The Strategic Counsel

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Final Report
MODERN AGRICULTURE AND AGRICULTURAL AWARENESS FOCUS GROUPS

Prepared for
Department of Agriculture and Agri-Food
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Prepared by
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Le résumé de ce rapport est aussi disponible en français.

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Statement of Political Neutrality

I hereby certify as Senior Officer of *The Strategic Counsel* that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the *Communications Policy* of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed: Donna Nixon

Donna Nixon, Partner

I. Executive Summary

Executive Summary

The Strategic Counsel is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) on the findings from a qualitative research study examining public perceptions and knowledge of the Canadian agriculture and agri-food industry.

A. Background

A key priority for AAFC is to communicate the role and importance of the agricultural sector in the lives of Canadians. The sector makes a significant contribution to the Canadian economy:

- Canada's agriculture and agri-food sector contributes $100 billion dollars annually to Canada's Gross Domestic Product;
- Canada is the 5th largest agriculture and agri-food exporter in the world. Agriculture accounts for more than $44 billion in exports; and
- the sector employs 2.1 million Canadians (the equivalent to 1 in every 8 jobs).

In addition to its economic heft, Canada has developed a strong reputation as a leader in agricultural research and innovation in areas related to disease prevention, improvements to crop varieties and yields, safety, quality and sustainability including environmental stewardship. The sector is certainly experiencing significant change, a component of which is driven by changing consumer tastes and demand. AAFC's website indicates that:

"Changing consumer and societal demands are influencing changes throughout the whole agriculture and agri-food system. Consumers are demanding more variety, more convenience, more environmentally-friendly and healthier food choices, as well as food that addresses their values, e.g. organic and halal products, accompanied by proper assurances of quality and safety."

AAFC's mandate is to work with farmers and food producers to support the growth and development of the agriculture and agri-food sector by means of policies, programs, research and technology that help producers and food manufacturers succeed in the domestic and global markets.

Despite the fact that the sector continues to modernize, diversify and innovate, recent surveys of the Canadian public have underscored a number of misperceptions about the agricultural sector and a relatively pessimistic public view with respect to its future outlook. It should be pointed out that a multi-year initiative, started with seed funding from Farm Credit Canada, called Agriculture More Than Ever (www.agriculturemorethanever.ca), and supported by the Canadian Federation of Agriculture, along with several provincial governments is working together to improve perceptions of the agricultural sector.

B. Research Objectives and Approach

AAFC wished to undertake a series of focus groups to gauge public perceptions of the industry in order to feed into strategies aimed at shifting current public perceptions (from views of the sector as a traditional farm enterprise to an industry with strategic priorities focused on innovation, competitiveness and market development) and the development of communications approaches and products. Ultimately, the goal is to increase the public's understanding and interest in the sector.

Obtaining a more in-depth understanding of the public's understanding as to where their food comes from, how it gets from farm to tables, as well as the health, safety and environmental attributes of agricultural products is considered fundamental to the development of a competitive sector with strong growth potential. Of note, Canadian consumers spend close to $200 billion on food, beverages and tobacco from retail stores and restaurants, accounting for just under one-fifth of their total personal spending.

The specific objectives of this research study included gaining insight into Canadians' views with respect to:

- current perceptions of the sector;
- views on the role and efficacy of government investment in agricultural innovation and science;
- identification of gaps in knowledge and understanding of the sector and AAFC's role and responsibilities, as well as areas of interest in terms of AAFC's mandate;
- perceived effectiveness of AAFC's various communications tools and tactics; and
- preferences with regard to how best to communicate with the public.

C. Key Findings

1. Awareness, Familiarity with and Knowledge of the Sector

Findings from this series of focus groups clearly indicate a relatively low level of awareness, particularly among urban dwellers, of the current state of the sector and its contribution to provincial, regional and the national economy. While those in the rural centers in which focus groups were held did exhibit a somewhat higher level of familiarity with the sector, they nonetheless felt they too were not as knowledgeable of the larger national picture and outlook.

Participants' comments and indeed their explicit remarks reflect a feeling of being quite disconnected from the sector, despite the trend of increasing interest in food quality. The views and impressions of most are formed on the basis of their experience as consumers. Few have actually visited a working farm, and many participants' ideas about agriculture and farming appear to be based on a rather idyllic and outdated view of the sector.

It was clear from the discussions that participants lack a comprehensive understanding of the sector and specifically the full range of players either directly or indirectly engaged in agriculture and agri-food in Canada. Perhaps not surprisingly, when participants think about the sector there is a tendency to envisage farms, livestock, crops, green pastures, endless wheat fields, and prairie landscapes. This type of imagery reinforces a view of the sector as traditional rather than modern, progressive and innovative.

Of note, a number of participants expressed confusion about the term 'agri-food'. It was thought that this term referred to plants (rather than livestock) or the industrial part of agriculture. In any case, the term is somewhat meaningless and, in some cases, has negative connotations especially when used in the context of technological advancement and innovation in the sector as it leads some to imagine practices involving chemical enhancement and bio-engineering of foods.

2. Outlook for the Sector

The forecast for the sector was somewhat mixed although, on balance, participants seemed somewhat more pessimistic than optimistic. This view was based on a number of perceptions, many of which are heavily influenced by alarmist documentaries and media reports on the state and future of agriculture in Canada.

- In almost every discussion, participants raised the issue of genetically modified foods (GMOs) and concerns about the impact and long-term effects of this practice
- Consolidation in the agricultural sector leading to the dominance of factory farms and fewer, large industrial players
- Encroachment of development on agricultural lands
- Declining interest of current and future generations in the sector
- Farming practices that are unsustainable and/or potentially environmentally harmful
- Population growth and simple economics of feeding a rapidly increasing number of people

Interestingly, some participants' views about the state and future of the sector were based solely on the fact that the produce and goods they purchase in grocery stores on a regular basis seem to be increasingly made or shipped from outside of Canada. This leaves them with a sense that the sector must be shrinking and that other nations, such as China, are becoming more dominant in this field. Although many participants are aware of Canada's dominance in world wheat markets, it was notable that many believe Canada is, overall, a net importer of agricultural products. This begs the question, why? Participants frequently questioned why, given our expansive geography and rich agricultural heritage, Canada is not more self-sufficient when it comes to food production. In particular, there is a concern that the sector remains focused principally on the extraction of primary resources rather than creating additional economic benefits through value-added activities, i.e., food manufacturing and processing, packaging, transportation and trade. Although participants didn't explicitly use the terms 'disinvestment' or 'hollowing out,' their comments suggest that they believe Canada's trade position in the sector and its competitiveness have declined sharply in the last several decades.

And, while participants felt generally confident in the quality of agricultural products produced within Canada, and certainly trust the federal government to ensure that quality standards are met, the growing influence of out-of-country players, particularly emerging economies leads to some concern, both with respect to sovereignty as well as safety.

Those holding a more optimistic view of the sector typically base this perspective on population projections which forecast a continued and increasing demand for the types of agricultural products Canada produces.

3. Innovation in the Sector

Participants' top-of-mind responses in terms of identifying sectors of the economy that they would deem to be innovative did not often include the agriculture and agri-food sector. For many, innovation has connotations of doing things differently, employing technology such as the Internet, and undertaking practices that will improve efficiencies and therefore profitability. Participants generally think about agriculture as not having changed much in the last 10 to 20 years. As such, compared to the rate of change in other sectors such as energy, education, and healthcare, there is a propensity to discount the agriculture and agri-food sector as being modern or innovative.

At a purely rational level, and when pushed to think more deeply about the topic, participants did believe the sector is innovative and must continue to innovate in order to remain competitive and profitable. However, it was challenging for participants to identify specific innovations that they had heard or read about. Many pointed to advancements in farm machinery and equipment in addition to work being done to produce hardier varieties of crops. The topic of GMOs was again raised in this context.

While recognizing that the sector faces a number of challenges, ranging from extreme and unpredictable climactic conditions to increased competition and population growth, most participants were somewhat pressed to identify how innovation might assist in addressing these issues.

4. Telling the Story of Modern Agriculture and Agri-Food

Participants expressed an interest in learning more about the sector and were, in fact, surprised to learn about the impact and contribution of the sector in terms of employment levels, output and exports. The information gleaned from reviewing brochures and videos produced by AAFC left them feeling much more optimistic about the outlook for the sector and more knowledgeable about the many innovations, research and development taking place. Of particular interest are those innovations and/or basic facts and statistics that:

- are relevant to the consumer from the standpoint of food safety, food quality or personal health;
- provide a glimpse into what's happening in each region/province of the country so that they have an idea of what is taking place closer to home; and
- offer new and/or surprising information and/or positions agriculture in non-traditional ways or uses.

Participants put forward a wide range of suggestions in terms of constructing the 'story.' These included heavier reliance on social media to tell the story, in addition to more traditional advertising such as billboards, and transit shelter ads as well as opportunities to discover more about the sector in a 'hands-on' way by means of interactive games/quizzes or on-the-farm activities.

Key to crafting a story is ensuring that both the narrative and the protagonist or spokesperson is relevant and credible. In this respect, participants suggested a clear articulation of the benefits to the consumer of innovations taking place in the sector. Additionally, it was felt that those engaged in research and development, including researchers and, most importantly, the producers, should speak on their own behalf. This approach would garner significantly more credibility and would be more likely to engage the general public by profiling those who are passionate about the sector and stand to benefit most from the innovations.

Finally, it is important to strike the appropriate balance in terms of the tone, between being factual, informative and educational on the one hand, but also relating information that is not overly onerous for the reader or viewer to process and does not come across as self-promotional. Bright and colourful graphics can be used to effectively create visual appeal, but should be used in conjunction with short facts or 'teasers' to leave the target audience feeling as if they have learned something new and interesting about the sector.

MORE INFORMATION

Supplier Name: The Strategic Counsel
PWGSC Contact Number: 01B68-140400/001/CY
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To obtain more information on this study, please e-mail por-rop@agr.gc.ca

II. Résumé du rapport

Résumé du rapport

Le Strategic Counsel a le plaisir de présenter à Agriculture et Agroalimentaire Canada (AAC) les résultats d'une étude de recherche qualitative sur les perceptions et les connaissances du public à l'égard de l'industrie agricole et agroalimentaire canadienne.

A. Contexte

L'une des grandes priorités d'AAC est de communiquer l'importance du secteur agricole et le rôle qu'il joue dans la vie des Canadiens. Ce secteur fait une contribution appréciable à notre économie :

- La part annuelle du secteur agricole et agroalimentaire au produit intérieur brut du pays s'élève à 100 milliards de dollars;
- Le Canada arrive au cinquième rang mondial des exportateurs de produits agricoles et agroalimentaires. L'agriculture réalise des exportations d'une valeur de 44 milliards de dollars;
- Le secteur emploie 2,1 millions de Canadiens (l'équivalent d'un emploi sur huit).

Outre ces données économiques, le Canada s'est bâti une solide réputation comme chef de file de la recherche et de l'innovation en agriculture dans des domaines tels que la prévention des maladies, l'amélioration des variétés et du rendement des cultures, la salubrité, la qualité et la durabilité, y compris la gérance environnementale. De toute évidence, de profonds changements sont en cours dans l'industrie, qu'il faut attribuer pour une part à l'évolution des goûts et de la demande des consommateurs. Comme l'indique le site Web d'AAC :

> *« L'évolution des exigences des consommateurs et de la société entraîne des changements dans l'ensemble du système agricole et agroalimentaire. Les consommateurs réclament des aliments plus variés, pratiques, respectueux de l'environnement et sains, ainsi que des aliments qui correspondent à leurs valeurs, comme les produits biologiques et halal, et des garanties de qualité et de salubrité. »*

Le mandat d'AAC est de collaborer avec les agriculteurs et les producteurs d'aliments pour favoriser la croissance et le développement du secteur au moyen de politiques, de programmes, de recherches et de technologies qui aident les producteurs et les fabricants de produits alimentaires à se tailler une place sur les marchés national et mondial.

Bien que l'industrie maintienne le cap sur ses objectifs de modernisation, de diversification et d'innovation, des enquêtes récentes auprès du public canadien mettent en évidence un certain nombre de perceptions erronées au sujet du secteur agricole ainsi qu'une opinion relativement pessimiste sur ses perspectives d'avenir. Rappelons qu'une initiative pluriannuelle intitulée L'agriculture plus que jamais (www.agricultureplusquejamais.ca) – tout d'abord financée par les fonds de démarrage de Financement agricole Canada, puis par la Fédération canadienne de l'agriculture et plusieurs gouvernements provinciaux – s'efforce d'améliorer l'image du secteur agricole.

B. Objectifs de recherche et méthodologie

AAC souhaitait la tenue d'une série de groupes de discussion afin de mieux cerner les perceptions des Canadiens à l'égard de l'industrie. Les résultats devaient permettre d'orienter les stratégies visant à modifier l'opinion actuelle (c.-à-d. à remplacer la vision des fermes traditionnelles par celle d'une industrie dont les priorités stratégiques sont l'innovation, la compétitivité et le développement des marchés) ainsi que les méthodes et les produits de communication élaborés. Le but de la démarche, à terme, est d'amener le public à mieux comprendre le secteur et à s'y intéresser davantage.

Quelle idée le public se fait-il de la provenance des aliments, de leur trajectoire de la ferme à la table? Que sait-il de la santé, de la salubrité ou des caractéristiques environnementales des produits agricoles qu'il consomme? C'est un fait admis que les réponses à ces questions sont fondamentales pour l'avènement d'un secteur concurrentiel à fort potentiel de croissance. Soulignons que les consommateurs canadiens consacrent près de 200 milliards de dollars à l'achat d'aliments, de boissons et de produits du tabac dans les magasins de détail et les restaurants, soit tout près d'un cinquième de leurs dépenses personnelles.

Cette étude de recherche avait pour objectifs particuliers de mieux faire comprendre les points de vue des Canadiens en ce qui concerne :

- les perceptions actuelles du secteur;
- le rôle et l'efficacité des investissements gouvernementaux dans les sciences et l'innovation en agriculture;
- les lacunes au chapitre des connaissances et de la compréhension du secteur en général, et du rôle et des responsabilités d'AAC en particulier, et les domaines d'intérêt liés au mandat d'AAC;
- l'efficacité des divers outils et stratégies de communication d'AAC;
- les méthodes à privilégier pour communiquer avec le public.

C. Principales constatations

1. Niveau de sensibilisation, de familiarité et de connaissances à l'égard du secteur

Les résultats de cette série de groupes de discussion font clairement ressortir un manque de sensibilisation, particulièrement prononcé chez les citadins, en ce qui concerne la situation du secteur et son apport à l'économie provinciale, régionale et nationale. Si le secteur paraît un peu plus familier aux participants des collectivités rurales où des groupes de discussion ont eu lieu, eux aussi s'estiment peu renseignés sur le profil de l'industrie à l'échelle nationale et sur ses perspectives d'avenir.

Les commentaires des participants, souvent explicites, expriment un sentiment de coupure par rapport au secteur, en dépit de l'intérêt croissant porté à la qualité des aliments. C'est surtout leur expérience à titre de consommateurs qui a façonné les opinions et les impressions des répondants. Peu d'entre eux ont jamais visité une exploitation en activité et, dans bien des cas, leur façon d'envisager l'agriculture semble ressortir à une vision idyllique et périmée du secteur.

Les discussions l'ont montré sans équivoque, les participants sont loin d'avoir une compréhension approfondie de l'industrie canadienne de l'agriculture et de l'agroalimentaire, et en particulier de l'éventail d'acteurs qui y prennent une part directe ou indirecte. Sans surprise, lorsqu'ils pensent à l'agriculture, les participants sont portés à imaginer des fermes, des animaux d'élevage, des cultures, de verts pâturages, des champs de blé s'étendant à perte de vue et des paysages sortis tout droit des Prairies. Ce type d'images vient appuyer leur vision d'une agriculture traditionnelle plutôt que moderne, novatrice ou axée sur le progrès.

Fait digne de mention, le terme « agroalimentaire » a laissé plusieurs participants perplexes. Certains pensaient qu'il faisait référence aux cultures (par opposition aux animaux d'élevage) ou encore aux aspects industriels de l'agriculture. En tout état de cause, ce terme présente peu d'intérêt et a parfois des connotations négatives, surtout dans le contexte d'avancées techniques et d'innovations sectorielles, où il évoque pour certains des pratiques faisant appel aux additifs alimentaires et à la bio-ingénierie.

2. Perspectives sectorielles

Les prévisions pour le secteur ont été mitigées, encore que la majorité penchait généralement vers le pessimisme. Ce phénomène s'explique par un certain nombre de perceptions, dont beaucoup sont fortement influencées par des documentaires et des reportages alarmistes sur l'état de l'agriculture au Canada et son évolution future. Voici quelques-unes des préoccupations évoquées :

- Les aliments génétiquement modifiés et leurs effets à long terme – cette question a été soulevée lors de chaque discussion ou presque.
- Les regroupements dans le secteur agricole, avec l'essor des grandes fermes qu'ils entraînent et la prédominance d'une poignée de gros acteurs industriels.
- L'empiètement du développement sur les terres agricoles.
- La désaffection des générations actuelle et futures pour le secteur.
- Les pratiques agricoles insoutenables ou susceptibles de nuire à l'environnement.
- La croissance démographique et les dimensions économiques liées au nombre toujours plus grand de bouches à nourrir.

Fait intéressant, le pessimisme de certains participants concernant la situation et l'avenir du secteur reposait sur un seul constat : les produits et marchandises qu'ils achètent régulièrement dans les magasins d'alimentation semblent de plus en plus souvent provenir d'ailleurs qu'au Canada. Ils en retirent l'impression que le secteur est en repli et que d'autres pays, comme la Chine, jouent désormais le premier rôle. Bien que la position de force du Canada sur les marchés mondiaux du blé soit généralement connue, beaucoup pensent que le pays est tout de même un importateur net de produits agricoles. La question est de savoir pourquoi. Les participants se sont souvent demandé pour quelle raison le Canada n'est pas plus autosuffisant sur le plan de la production alimentaire étant donné l'immensité de son territoire et son riche héritage agricole. Ils ont dit craindre que le secteur focalise ses efforts sur l'extraction de ressources primaires au lieu de générer des avantages économiques supplémentaires par l'entremise d'activités à valeur ajoutée, p. ex., la fabrication de produits alimentaires et la transformation des aliments, le conditionnement, le transport et le commerce. Bien que les participants n'aient pas explicitement parlé de désinvestissement ou d'érosion, leurs remarques laissaient entendre que la situation commerciale et la compétitivité du Canada dans ce secteur ont accusé un net recul dans les dernières décennies.

Au demeurant, si les participants font généralement confiance à la qualité des produits agricoles canadiens et s'en remettent au gouvernement fédéral pour faire respecter les normes de qualité, l'influence croissante des acteurs étrangers, notamment des économies émergentes, est un point qui les préoccupe, aussi bien sur le plan de la souveraineté alimentaire que de la salubrité.

Quant aux tenants d'une vision plus optimiste, ils citent à l'appui de leur point de vue des projections démographiques qui annoncent une hausse soutenue de la demande de produits agricoles provenant du Canada.

3. Innovations sectorielles

Les réponses immédiates des participants quand il s'agissait d'identifier des secteurs économiques novateurs ont rarement fait mention de l'agriculture et de l'agroalimentaire. De l'avis de beaucoup, l'innovation a pour connotations de nouvelles façons de faire, l'utilisation de technologies comme Internet, et l'adoption de pratiques plus efficaces et donc plus rentables. De façon générale, les participants ont l'impression que l'agriculture n'a guère changé depuis les dix à vingt dernières années. Ils ont tendance, compte tenu de l'évolution rapide d'autres secteurs comme l'énergie, l'éducation et les soins de santé, à rejeter d'emblée la notion que l'industrie agricole et agroalimentaire soit moderne ou innovante.

Sur un plan strictement rationnel et après avoir été incités à pousser plus loin la réflexion, les participants ont finalement reconnu que l'industrie était novatrice et qu'elle devait continuer de l'être pour rester concurrentielle et assurer sa rentabilité. Il leur a cependant été difficile de donner des exemples précis d'innovations dont ils avaient entendu parler ou qu'ils avaient découvertes à travers leurs lectures. Ils ont souvent évoqué les progrès des machines et du matériel agricoles ainsi que les travaux visant à produire des variétés végétales plus rustiques. La question des organismes génétiquement modifiés a aussi refait surface dans ce contexte.

Tout en constatant les défis auquel est confronté le secteur, qu'il s'agisse de conditions climatiques extrêmes et imprévisibles, de la concurrence serrée ou de la croissance de la population, la plupart des participants ont eu du mal à expliquer en quoi les innovations permettraient de surmonter ces difficultés.

4. L'agriculture et l'agroalimentaire modernes : une histoire à raconter

Les participants ont exprimé le désir d'en apprendre plus sur le secteur, surpris qu'ils ont été par son impact et sa contribution en termes de niveaux d'emploi, d'extrants et d'exportations. L'information glanée à partir des dépliants et des vidéos réalisés par AAC leur a donné une perspective plus optimiste sur l'avenir de l'industrie et l'impression d'être mieux renseignés sur les multiples innovations et travaux de recherche et développement en cours. Leur ont paru particulièrement intéressants les innovations, les faits et les statistiques :

- qui sont pertinents pour le consommateur dans l'optique de la salubrité des aliments, de la qualité des aliments ou de la santé personnelle;
- qui donnent un aperçu de la situation dans chaque région ou province du pays, interpellant ainsi tous les publics;
- qui présentent des faits nouveaux ou étonnants, ou qui mettent en lumière des utilisations ou des aspects non traditionnels de l'agriculture.

Les participants ont fait une foule de suggestions concernant la formulation de « l'histoire ». Par exemple, ils ont proposé de compter davantage sur les médias sociaux, en complément des supports classiques comme les panneaux publicitaires, et de mettre des annonces dans les abribus. La possibilité de faire découvrir le secteur de façon « pratique », à l'aide de jeux ou de quiz interactifs et d'activités à la ferme, a également été évoquée.

L'un des aspects essentiels de la formulation de l'histoire consiste à assurer la crédibilité et la pertinence aussi bien du récit que du protagoniste ou du porte-parole choisi. À cet égard, les participants ont recommandé d'établir des liens clairs entre les innovations mises au point dans le secteur et les avantages qui en découlent pour les consommateurs. Ils estimaient également préférable que les acteurs de la recherche et développement, notamment les chercheurs, et plus encore les producteurs parlent en leur propre nom. Selon eux, cette approche présenterait l'avantage d'une crédibilité accrue et aurait de meilleures chances d'interpeller le public, d'autant plus si les personnes choisies sont passionnées par le secteur et sont celles qui bénéficieront le plus des innovations décrites.

Enfin, il faut trouver le ton juste, c'est-à-dire un ton factuel, instructif et éducatif, tout en véhiculant une information intelligible pour le lecteur ou le téléspectateur, et sans tomber dans l'autopromotion. Des éléments graphiques de couleur vive peuvent venir rehausser l'attrait visuel, mais devraient être associés à des messages factuels brefs ou accrocheurs, afin que le public cible ait l'impression d'avoir appris quelque chose de nouveau et d'intéressant sur le secteur.

RENSEIGNEMENTS

Nom du fournisseur : The Strategic Counsel
Numéro de contrat TPSGC : 01B68-140400/001/CY
Date d'attribution du contrat : 13-11-2014
Pour obtenir de plus amples renseignements sur cette étude, veuillez nous écrire à l'adresse courriel : por-rop@agr.gc.ca

III. Methodology

Methodology

A. Research Background and Objectives

The specific objectives of this research study included gaining insight into public views with respect to:

- current perceptions of the agriculture and agri-food sector;
- views on the role and efficacy of government investment in agricultural innovation and science;
- identification of gaps in knowledge and understanding of the sector and AAFC's role and responsibilities, as well as areas of interest in terms of AAFC's mandate;
- perceived effectiveness of AAFC's various communications tools and tactics; and
- preferences with regard to how best to communicate with the public.

B. Methodology

A total of 18 focus groups were conducted in 8 locations across Canada: four groups in Toronto and two groups in the remaining locations, including Halifax, New Liskeard, Montreal (in French), Montmagny (in French), Selkirk, Calgary and Vancouver. All groups were two hours in length. The moderator's guide is included as Appendix B of this document.

Schedule and Composition of the Focus Groups

City	Date	Locations	Group Characteristics
Toronto	Monday, December 2 2013	**Research House** 2nd floor, 1867 Yonge Street **Toronto**, ON M4S 1Y5416 488 2333 tel 416 488 2368 fax	5:30 pm Ages 55+, mixed gender 7:30 pm Ages 35-54, mixed gender
	Tuesday, December 3 2013		5:30 pm Newcomers, mix gender and ages 7:30 pm Newcomers, mix gender and ages
Halifax	Wednesday, December 4 2013	**MQO Research** 3rd floor, 1883 Upper Water Street **Halifax**, NS B3J 1S9 902 422 8704 tel	5:30 pm Women, mix of ages 7:30 pm Men, mix of ages
New Liskeard	Monday, December 9 2013	**Waterfront Inn** 2 Cedar Avenue **New Liskeard**, ON P0J 1P0 705 647 8711 tel 705 647 8714 fax 1 800 461 4644	5:30 pm Women, mix of ages 7:30 pm Men, mix of ages
Montreal	Monday, December 9 2013	**Groupe Christal Inc.** Suite 411, 1610 Rue Ste-Catherine Ouest **Montreal**, QC H3H 2S2 514 448 5539 tel 877 748 5539 toll-free 514 938 1181 fax	5:30 pm Women, mix of ages 7:30 pm Men, mix of ages

Montmagny	Tuesday, December 10 2013	**Hotel Centre-Ville** 3 boulevard Taché Est **Montmagny** QC G5V 1B6 418 248 3623 tel	5:30 pm Mix of genders and ages 7:30 pm Mix of genders and ages
Selkirk	Wednesday, December 11, 2013	Salon B **Selkirk Inn & Conference Centre** 162-168 Main Street **Selkirk**, MB R1A 1R3 204 482 7722 tel 204 785-8568 fax	5:30 pm Women, mix of ages 7:30 pm Men, mix of ages
Calgary	Thursday, December 12 2013	**Qualitative Coordination** Suite 120, 707 10th Avenue SW **Calgary**, AB T2R 0B3 403 229 3500 tel 403 229 3311 fax	5:30 pm Ages 18-34, mixed gender 7:30 pm Ages 35-54, mixed gender
Vancouver	Monday, December 16 2013	**Vancouver Focus** 1156 Hornby Street **Vancouver**, BC V6Z 1V8 604 682 4292 tel 604 682 8582 fax	5:30 pm Ages 55+, mixed gender 7:30 pm Ages 18-34, mixed gender

The procedure for recruiting/screening participants adhered to Public Works and Government Services Canada and Marketing Research and Intelligence Association requirements. Recruiting was undertaken based on telephone numbers obtained from up-to-date telephone books for each of the target locations. A list of numbers was randomly selected from the telephone book. To increase the randomization, the list of numbers that recruiters were provided with was adjusted by increasing or decreasing the last digit of the number by 1 or 2 (i.e. if the number selected from the telephone book was 236-0296, the number given to a recruiter was either 236-0295 or 236-0297).

The target audience for this study was the general population of Canadians, 18 years and older. The recruiting script contained a series of standard screening questions so as to obtain participants of varying socio-economic status and backgrounds. All groups comprised a reasonable cross section by:

- gender;
- age;
- marital and family status, i.e. those with/without children and of varying family sizes/composition;
- education;
- occupation;
- ethnicity; and
- household.

A "blind" approach to recruiting was taken in that respondents were told the groups were being conducted for the Government of Canada, but not specifically Agriculture and Agri-Food Canada. This approach ensured that participants with a specific orientation to or interest in agriculture and agricultural issues, whether through experience or impressions, were not over or under-recruited and, ultimately, facilitated a more representative selection of participants to the groups. It also ensured that participants did not overly-familiarize themselves with issues related to the sector prior to attending the groups. As such, participants' views were very much ‘top-of-mind’ and, as such, the reader of this report can be fairly confident that the views expressed and summarized in this report reflect an ‘unbiased’ perspective.

A total of 12 participants were recruited for each group, with the aim of having a minimum of 10 participants attend. Each of the 18 focus groups comprised between 8 and 11 participants. All participants were offered a $75 incentive. This is the recommended honorarium for groups being conducted in major urban and in rural centres and is the incentive included in The Strategic Counsel’s standing offer submission to the federal government for the conduct of public opinion research.

All participants were requested to sign a document, prior to conducting the groups, giving their permission to video/audio-tape the groups, for purposes of review and analysis in the preparation of this report.

C. A Note on Interpreting Findings from Qualitative Research

The reader should note that the findings from focus groups are not statistically reliable and, unlike national surveys, the results cannot be extrapolated to the population at large. The exact proportion of participants holding any given view should not be seen to represent the proportion of those holding the same view in the target population.

Nevertheless, focus groups are considered to be a highly effective methodology for detecting and exploring the subtleties in and nuance of views and attitudes. In particular, the opportunity to hear participants expressing their views and opinions in their own words is of great value. Overall this format is less restrictive, as compared to more structured surveys, with respect to allowing participants to articulate their reactions and perceptions. By providing a semi-structured and mostly open-ended question format within a relatively free-flowing discussion forum, participants are able to engage in an interchange with other participants simulating the way in which the public is likely to debate and discuss issues among their friends, family and others. The range of socio-economic backgrounds around the table often yields varying perspectives on issues which adds to the researcher’s and clients’ understanding of the degree to which there is a consensus or a divergence of views.

IV. Perceived Importance of Agriculture to the Canadian Economy: Past, Present and Future

Perceived Importance of Agriculture to the Canadian Economy

In order to gauge participants' sense of the relative 'top-of-mind' importance of the agricultural sector to the Canadian economy, all discussions began with a broad question regarding how Canada's economy has evolved and might be expected to change in the future. Participants were asked to consider Canada's economy and key industrial sectors across three timeframes – past (approximately 20 years ago), present and future (20 years from now). No particular terms of reference were offered to direct participants' thinking as to how one determines which industries might be considered as 'key' to the Canadian economy, so the output from this exercise is very reflective of those sectors that tend to dominate participants' share of mind.

While the results of this exercise varied to some extent by location, reflecting obvious regional economic differences, participants were generally consistent in identifying those industries or sectors which they felt were critical to driving Canada's economy. The chart below summarizes the views of participants and illustrates a number of interesting perceptions about current and anticipated trends in the Canadian economy as well as the evolving role of agriculture. Participants' comments suggest an expectation that, over time, the Canadian economy has been and will continue to diversify beyond its traditional reliance on natural resources. Additionally, the sectors identified forecast the ongoing modernization of Canada's economy with a particular emphasis on research and development as well as technological innovation across a range of areas, including energy, the environment, media, medicine, retail and communications.

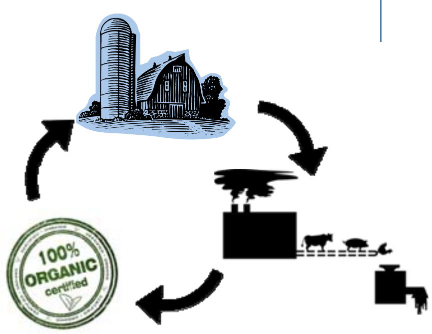
Most participants did not hesitate to note the significance of agriculture and farming to Canada's economy during past decades. However, there was much less consensus regarding the extent to which the agricultural sector is seen to be playing a key role at present, and whether it would continue to do so in the future. Some participants held the view that, by virtue of an increasing global population, Canada's agricultural sector would necessarily continue to expand in order to meet both domestic and international demand. Others felt that continuing consolidation within the sector (i.e., a small number of dominant multi-national players) along with advances in productivity and yields would mean a reduction in the overall 'footprint' of agriculture within the Canadian economy and, therefore, a general decline in the importance of the sector in terms of employment and impact.

There was a sense among a core group of participants in most of the focus groups that Canada's agricultural sector has evolved away from the family farm towards large industrial and factory farms and that this trend is seen to parallel a decline in the overall quality of foods produced in Canada. It is apparent that the heavy marketing of organic and locally-grown foods in recent years, in addition to changing consumer tastes and culinary activism, have enhanced concerns among some members of the public that quantity can only be achieved at the expense of quality. Participants' comments at this early stage of the discussion, and indeed throughout the two hours, also suggested an undertone of idealism or romanticism around the family farm which they view as out of step with modern-day agricultural practices and the international marketplace. Nevertheless, there appears to be at least modest hope that the sector can evolve in a way so as to ensure an appropriate balance between 'fresh, local, organic' and 'mass produced.'

Sectors Viewed as Significant Contributors to the Canadian Economy

PAST

- **Agriculture (Family Farming, Livestock)**
- Automotive
- Construction
- Fishing
- Lumber/Forestry/Logging
- Manufacturing
- Media (Print)
- Mining
- Oil & Gas
- Transportation (Rail)



PRESENT

- **Agriculture (Mass Industrial Production)**
- Automotive (Auto-parts)
- Energy (Oil & Gas)
- Information Technology (Multi-media, Animation, Software)
- Infrastructure (Building & Repairs)
- Media (Broadcast, Online)
- Mining
- Pharmaceutical
- Real Estate Development
- Retail (Small Business)
- Services (Banking)
- Tourism
- Trade (Import/Export)
- Transportation (Trucking)

FUTURE

- **Agriculture (Local & Organics/Factory Farming)**
- Biotechnology
- Education
- Energy (Oil & Gas, Renewable and Green Energy) & Environmental Technologies
- Healthcare
- Information & Communication Technologies (Digital, Animation)
- Medical Technology
- Pharmaceuticals
- R&D (Medical & Scientific)
- Real Estate Development
- Retail (Online)
- Services (Banking, Professional, Trades)
- Tourism
- Trade (Import/Export)
- Water

Of additional note, although unrelated to the perceived importance of agriculture, participants across the board were quick to cite the vital importance of the oil and gas sector to Canada's economic future. At the same time, they also believe that renewable energy sources will be a key growth area. The number of participants who, in the context of this discussion, identified public sector services (i.e., healthcare and education) as key 'economic drivers' for the future was also quite striking. While public sector policies and spending certainly contributes to the economic growth, and the public sector creates many jobs for Canadians, there did not appear to be any acknowledgement among participants with respect to the cost to taxpayers should the public sector take on an expanded role in healthcare and education.

When participants were asked to comment on any particular trends after reviewing the lists of dominant sectors – past, present and future – the common thread among responses was the continued focus on primary industries (i.e., extraction of natural resources) and concern regarding a decline in Canada's secondary manufacturing capacity or ability to generate additional value from its abundance of natural resources. An additional concern raised was the perception of increased foreign ownership in key industrial sectors and the commensurate implications for a loss of sovereignty in areas that are seen to be vital to Canada's economic future.

"One trend is that we consistently sell off our natural resources. We don't establish manufacturing [facilities] … let China take our [resources] and sell them back to us. The second trend that is disturbing is that we'll be Americanized by international groups. Anytime we build up value, we sell off to the golden goose. This has happened in the past … Hudson's Bay Company. We're a population of 25 or 30 million. The U.S. is ten times the population, so that's where the money goes."

"It's even happening in our real estate. In Toronto, there are buildings that nobody lives in."

A. Key Indicators of Sector Growth

For most participants, impressions as to those sectors which are growing or contracting are based mostly on what they read, hear or see in the media. Media reports on plant closures, industrial hollowing out, failing flagship enterprises and, by contrast, positive press on start-ups, investments in key sectors as well as employment data leaves a strong impression. The continuing media focus on the oil and gas sector, including coverage given to announcements by government spokespersons regarding pipelines and negotiations with the United States, has clearly contributed to cementing the importance of the energy sector to Canada's economy, across all regions.

"If an industry is in the news, it is either really up or really down."

Otherwise, most participants tend to focus on job creation and employment prospects as predictors of whether a sector is expanding or contracting, and its overall importance to the national economy.

Beyond these fairly rudimentary measures of sector vitality, some participants did indicate that they rely to some extent on key financial indicators such as corporate/sector profitability, sales, revenues, investment and share value/trading activity. In addition to media focus, advertising by industries was viewed as indicative of activity and growth.

Notably, very few considered the contribution of a sector to the Gross Domestic Product (GDP) as a vital statistic to determining the significance of an industry or sector. In fact, while some had heard of the term GDP, many had not. Even among those who recognized the term, many had only a vague understanding of what these initials stood for or what the term meant, i.e., how GDP was calculated. Very few were able to provide a clear definition of GDP. In essence, the term was relatively meaningless to the majority of participants in the context of evaluating the strength of an industry or sector.

"I think it means whether you manufacture or export more than you import."

"It is the average income."

"It's what you produce per capita."

B. Innovative Sectors of the Canadian Economy

A discussion around innovation in the Canadian economy was undertaken in two parts. First, participants were asked to think about what the characteristics or attributes of an innovative company, industry or sector might be. The output from this conversation was useful in the subsequent discussion which aimed to identify those sectors viewed as more innovative and the degree to which agriculture was among these.

Most commonly, innovation is associated with increased efficiency, leading to greater profitability.

"Delivering more for the same … taking the business to the next level."

In the minds of participants, innovation is associated with and/or leads to a range of behaviours or states, including the following:

- job creation or more accurately, job restructuring as ultimately there may be less requirement for human capital;
- new investment, i.e., increased number of businesses in the sector;
- improvements in quality;
- improvements in productivity, i.e., efficiencies, higher volume with fewer/same resources;
- increased automation, i.e., integration of the latest technologies;
- profitability;
- increased competitiveness as a result of lower costs of production;
- changing or upgrading, i.e., experiencing a lot of change;
- new products;
- green, i.e., sustainable both in terms of jobs and overall operation;
- creativity;
- fairness, i.e., fair pay, pension and benefits, good workplace conditions;
- research-based, i.e., finding new or different ways to do things;
- knowledge-based; and
- any type of work relying heavily on the Internet, i.e., online retailing.

From the list of characteristics or associations generated above, it was clear that participants generally tend to associate innovation with mainly positive outcomes, save for the possible negative impact on employment. Of particular note was the tendency in many of the groups for participants to focus on 'green' or 'sustainability' as an integral aspect of innovative industries or sectors, as well as the notions of 'fairness,' 'social innovation' and the 'public good.'

"Leading edge … for me it would be ethical, fair trade, and having at its core the ability to be sustainable and not waste resources."

"Something that isn't prohibitively expensive … it's about being creative … thinking of ways to help society as a whole, not just the wealthy."

Another way of defining innovation was as something 'new' or 'different' although whether it meant doing something better was debatable.

"A new way to do it. A better way. A safer way."

"To me innovative means novel. It doesn't mean it has to be successful. Innovation is something that is new or different."

Others felt that innovation implied an ability to react quickly to changing circumstances and on a global scale.

"When I think of modern, I think we can work globally. You can move goods faster."

"It has to do with industries being nimble and responsive. When I think of outdated industries, I think of industries that go through a boom and bust, and don't respond quickly enough. I think of mining, in response to world prices. Mining is such a heavy investment, that it will open, and it will close."

The question regarding which sectors could be described as innovative was challenging for many participants, particularly given the continuing tendency to think of Canada's economy as being predominantly reliant on the output from primary industries. Although many of these industries are adopting innovative business practices, a large number of participants tend to view them as highly labour intensive and, perhaps, requiring a less skilled labour force. The obvious sectors are cited when participants were asked to identify those industries or parts of Canada's economy that they would deem to be innovative – IT, any industry whose backbone is the Internet (e.g., Amazon). Other sectors that were most often identified as innovative or modern included:

- the auto sector;
- the energy sector;
- healthcare;
- the service sector, e.g., banking and retail; and
- social media.

Views as to whether agriculture could be included in this list were mixed, although, on balance, most participants felt Canada's agricultural sector could be considered 'relatively low tech' or not as innovative as the other sectors noted. One of the mental hurdles appears to be the simple fact that participants don't hear much about what's going on in this sector. As a result, they don't have a clear and well-formed impression of the many changes and improvements that have taken place in agricultural practices. As will be highlighted in a later section of this report, participants visualize agriculture as fields of crops, livestock, farms and tractors. The picture they formulate resembles agriculture as it might have looked in the last century. Although these images are typical of what one often sees on farms today, there is much more innovation and technological advancement happening behind the scenes than most participants would imagine.

When further probed regarding what participants would need to see or hear more about to be able to picture the sector as more modern and innovative, participants suggested a stronger sense of the competitiveness of the sector, new players coming into the industry as opposed to the current perception that employment and investment in the sector is declining, and a focus on producing 'healthy' foods ,i.e., movement away from genetically modified foods.

The terms innovation, modern and progressive are often used interchangeably. However, for many participants, there are subtle, yet important, distinctions and nuances that change the 'tone',i.e., positive or negative, and the way in which individuals interpret these terms.

The term 'innovation' tends to connote change through the adoption of technology, but not necessarily in a positive way. It also connotes a sense of evolution or advancement.

"Technology is making more money with fewer people employed."

'Modern' generates overtones of something new and current, but not necessarily different. 'Progressive' means something a little different again – better, gradual change, growing.

C. State of and Outlook for the Agricultural Sector in Canada

As noted earlier, participants appeared somewhat conflicted as to the extent to which the agricultural sector would contribute significantly to Canada's economic future. Many participants did question how Canada's current agricultural system would be able to meet the demands of a growing population under increasingly challenging demographic and climatic conditions.

"We have to eat. But, where is the food going to come from. How are we going to grow food in the future for all these people that are here? I don't know."

A number of participants began to question whether Canada is in fact a net importer or exporter of agricultural and food products. Again, there was no clear agreement other than that many felt Canadian wheat sales abroad were likely a significant contributor to a net positive national balance of payments.

On the one hand, many participants felt that global population projections, combined with Canada's natural abundance of agricultural land, positioned the country favourably to become a dominant agricultural exporter.

"As the world population grows, Canada has so much land. We can produce a lot of stuff. As the world population is projected to grow, the increase in demand [for food products] will be huge."

Countering this argument, there were almost an equal number of participants who felt that Canada's agricultural sector was shrinking. Many participants shared personal stories about friends or family members who were either forced to, for economic reasons, or chose to leave farming because the industry was simply no longer profitable to be run as a smaller, family-owned business. Even those who had no strong personal connection to the industry had the impression that Canada's agricultural sector must be declining if for no other reason than the fact that urban centres, like the Greater Toronto Area (GTA) for example, are experiencing rapid growth. Extensive urban sprawl in centres like the GTA leaves many individuals with the impression that previously viable agricultural lands are being sold for residential and industrial development.

"Agriculture is shrinking. The land is being used for other purposes. We are going to be out of land for this purpose."

Still others felt it was too difficult to predict the outlook for agriculture in Canada given the unpredictable and often extreme weather conditions faced by farming operations. These participants commented on the increased frequency and severity of droughts or floods which can dramatically alter the outlook for the agricultural sector.

A number of participants were somewhat perplexed, when confronted with the question about the state of agriculture in Canada today, and its outlook for the future. Many participants wondered why, given Canada's natural and rich agricultural bounty, we do not appear to be self-sufficient as a food producer.

"It's a very large industry, but a country that can't feed itself."

"We import too much fruit. It's put the fruit farmers out of business."

Still others commented that, the cost of entry into farming has become prohibitive such that only big business can afford to invest in the technology and machinery required to establish a profitable operation in this sector. A number of participants alluded to the financial and regulatory burdens placed on those wanting to get into farming.

"They put so many stipulations into effect that it makes it hard for any new person to get into the industry. It's really impossible because of the financial burden. No one wants to take a chance."

This same participant also indicated that the damage caused by the BSE[1] outbreak in Alberta, going back to 2002-2003, was contributing to ongoing barriers to entry into the farming sector due to the quarantines and other stipulations that government had put into place.

There is a predominant belief that the family farm is in decline with the exception of a few producers who are able to penetrate niche market areas or establish a highly specialized operation.

"I can see it fracturing along the lines of 90% will be the big corporate farm and there will be a stronger 10% against the use of GMO's and pesticides. And, I think the organic farming industry will be a lot stronger. It will be a minority, but the organic industry will grow."

Some participants believe that there has been significant foreign investment in Canada's agricultural sector. While they view this as a sign that the outlook for the sector is good, they also feel it is a trend that Canadians themselves will not necessarily benefit from as former 'owners' of the resource.

"Foreign investment in agricultural land in Canada has probably quadrupled."

Many participants focused on the impact of corporate farms replacing the family farm and there was a general sense that, while productivity may be improving, employment prospects in the sector were not. The comment below succinctly summarizes the apparent disconnect between individual citizens and farming, as an industry.

"You are taking jobs away from the families that used to have them. And, you are investing in hi-tech, in GMO's and all these other things. We are family citizens. We don't say 'geez, my life is better because we exported 72 million dollars worth of carrots last month'."

Within each discussion group, participants actively debated the current state of and outlook for Canadian agriculture. Unclear on the facts, there was a tendency among many to conclude that Canada must be a net importer of agricultural goods. This was especially true in centers such as Toronto where participants wondered about the impact of a combination of factors such as a rapidly increasing population, declining arable land being bought up by developers, and poor or unpredictable growing conditions as a result of climate change and extreme weather on agricultural production. Combined with the fact that, as many participants across all locations noted, much of the fruits, vegetables and food products they purchase have been imported from the U.S.A. and Central or South America, it is perhaps not surprising that participants were uncertain about the future of Canada's agricultural sector.

Of note, participants in focus groups held in more rural locations, like Selkirk, Manitoba, were equally divided on the question as to whether the industry was growing and profitable or possibly unsustainable.

"It's getting more challenging … harder to make a profit."

[1] Bovine spongiform encephalopathy (BSE), commonly known as mad cow disease, is a fatal neurodegenerative disease (encephalopathy) in cattle that causes a spongy degeneration in the brain and spinal cord. The first reported case in North America was in December 1993 from Alberta, Canada. Another Canadian case was reported in May 2003. The first known U.S. occurrence came in December of the same year, though it was later confirmed to be a cow of Canadian origin imported to the U.S.[45] Canada announced two additional cases of BSE from Alberta in early 2005.

I think it will grow and grow and grow and then it will collapse. With all the new technologies, there is always a cost. If you have an organic farm, which is not really modern, but it's coming back, you can add manure to your soil. It's not a new idea, but you are building your soil up. Once you go into fertilizers and pesticides, you are seeing bee colonies collapse. You are seeing very little eco-system. You are seeing top soil run off … contamination of water. In my opinion, this is not sustainable."

"I'm thinking it's actually going to go up [participant is expressing a positive view of the outlook for the sector], because we have really great farmland here [Selkirk, Man.]. And, as we enter the global market, there will be more trade. It won't be sustaining just us. But, I agree that if we aren't careful … we really need to look at our practices … we could be the bread basket of the world."

Regardless of their point of view on the future of the industry, whether participants felt optimistic or pessimistic, most agreed that it is vital to ensure Canada's agricultural sector is successful and growing.

V. Impressions of Canada's Agricultural Sector

Impressions of Canada's Agricultural Sector

The agriculture and agri-food industry evokes the usual array of visual imagery and associations, mostly pertaining to the types of crops grown and animals raised as well as the stereotypical scenery – prairie landscapes, pastoral scenery, livestock, barns, vegetables, crops and grains.

If we were to create a picture illustrating the types of images that are most commonly associated with the sector, the illustration below fairly adequately captures participants' thoughts and projections. The images evoked tend to create a rather quaint and perhaps somewhat idyllic image of the sector, reflecting more what participants would prefer than what, in reality, they feel is the case. In Toronto, for example, participants who generally felt they did not have a particularly strong personal connection to the sector, most often thought of prairie wheat fields, large combines and greenery. Notably, although Ontario does have a fairly significant agricultural sector, these participants were inclined to picture Western Canada as the 'center' of farming in Canada. And, in Selkirk, Manitoba, the imagery was similar – of endless fields of corn, soy and canola – although the picture would have included much larger farms or "corporations" as they were referred to in the discussion.

Imagery Associated with Agriculture and Agri-Food Sector in Canada

In another attempt to obtain spontaneous and unprompted impressions of the sector, participants were asked to think of a few words or phrases that come to mind when they think about Canadian agriculture. As expected, the results of this exercise generated both positive associations as well as expressions of concern.

Word Association

What words or phrases come to mind when you think about Canadian agriculture and agri-food?

Positive Associations	Expressions of Concern
• Provides life and health • Green • Local • Organic • Family-owned • Opportunity (associated with changing demographics of Canada and increased ethnic diversity) • Quality foods • Community gardens • Profitable ("a rich industry") • Dynamic	• Farm factories (and decline of the small family farm) • Depersonalized, industrialized, mass production • Big business ("Just the big, getting bigger") • Consolidation in the industry (a few major players – McCains) • Job losses • Risky • Crop failures, disease outbreaks • Foreign ownership • Need government support/'hand-outs" • Farms being taken over for real estate development • Expensive ("prices for food are going through the roof" and "cost of getting into agriculture is prohibitive") • Seasonality • Impact on the environment, pesticides, GMO's, bioengineering • Not innovative ("using the same practices forever") • Wasteful • Intensive farming practices • Hard work, long hours, tough job

In virtually all discussions, the topic of GMO's was raised in the context of participants' impressions of the sector. This was true in both urban and rural locations. In Selkirk, Manitoba, for example, participants spent some time debating the merits of using fertilizers, pesticides and producing genetically modified foods. This discussion was integrally linked to the increased size of farm operations and what is required to run a profitable business in the sector.

"I think one of the issues is that the Government of Canada subsidizes certain products that are very easily grown on the Prairies. So instead of getting a variety of fruits and vegetables that can be grown here organically, you are not getting any of the organic stuff that will help sustain the earth. Meanwhile, the GMO, soybeans, canola … every farm grows that. I know it's all GMO. That's what's profitable right now."

Participants expressed concerns that the dual objectives of profitability and producing 'healthy' foods may not be entirely compatible.

"Profit in itself is not bad. But, profit at the expense of other things … that's not good. Just as an example, using Roundup Ready[2] to make the operation profitable, you are spreading lots of pesticides throughout the environment. That will have an effect on the consumer who eats that product."

"In the summertime, when you are driving down by the fields, by the end of the week, it's been sprayed and harvested … all in one week, to mature the crop."

"Profit and health don't go together."

In order to further understand how participants view the agricultural and agri-food sector, each participant was requested to complete a short questionnaire indicating how they would rate the sector across a series of dimensions, i.e., innovative, successful, modern, etc. The results for this exercise, showing the mean scores only for each group, in each location, are shown in the table below. In reviewing these scores the reader should keep in mind that most groups comprised 8 to 11 individuals, so the average score shown reflects the feedback from a fairly small number of participants. As such, these scores should be interpreted with some caution and should be viewed as providing interesting insight into the overall level of knowledge and impressions of those participants who attended the groups. They are not reflective of what could be expected for the Canadian population as a whole.

In interpreting the results, a higher average score denotes a generally more positive assessment of the industry in respect of the seven dimensions which were assessed: successful, efficient, sufficiently regulated, well integrated, innovative, environmentally conscious and modern.

[2] GTS 40-3-2 (OECD UI: MON-04032-6, also known as Roundup Ready Soybean) is a genetically engineered variety of glyphosate-resistant soybeans produced by Monsanto. Glyphosate kills plants by interfering with the synthesis of the essential amino acids phenylalanine, tyrosine and tryptophan.

Views of Canada's Agriculture and Agri-Food Sector
Average Scores (on a 10-point scale)
Code: Lower Scores Highlighted in Red, Higher Scores Highlighted in Green

Dimensions Assessed*	Toronto	Toronto (newcomers)	Halifax	Montreal	Montmagny	New Liskeard	Selkirk	Calgary	Vancouver
Successful	5.6	6.3	6.0	6.7	7.5	7.6	6.4	6.9	5.4
Efficient	5.8	6.3	5.8	6.1	6.8	6.7	5.9	6.7	5.4
Sufficiently regulated	6.2	7.0	5.2	7.3	7.4	6.7	5.4	6.4	4.9
Integrated system of businesses	6.1	6.1	4.8	6.3	6.9	6.7	5.4	6.2	5.6
Promotes innovation	5.5	5.9	4.6	6.5	7.9	7.8	6.4	7.6	5.4
Environ-mentally conscious	5.6	7.7	5.2	5.7	6.8	7.3	5.0	6.4	5.3
Modern industry	5.6	6.0	5.1	6.3	6.8	7.2	6.2	7.2	5.4

***Participants ranked each dimension on a scale of 1 to 10, with the end-point representing a positive/negative position for that dimension. For example, 10 being a highly successful sector, 1 being a sector that is not very successful.**
Note that lower average scores do not necessarily mean all participants rated the industry poorly on that measure. It may reflect a diversity of opinion, both highly positive and highly negative.

In examining the average scores for each of these dimensions, some patterns of interest do emerge:

- In general, participants from the two largest urban centers on the East and West coasts, Halifax and Vancouver, tended to offer lower scores on all measures. Scores for Toronto participants (excluding newcomers) were also low across most of the dimensions.
- In particular, participants in Vancouver were least likely to describe the agricultural and agri-food industry as sufficiently regulated, with an average score on this dimension of slightly below 5 out of 10. They also offered the lowest average scores with respect to ratings of the sector as successful and efficient.
- Participants in Halifax were least likely, relative to the other eight locations in which groups were conducted, to view the sector as innovative, integrated or modern.
- Scores in the more rural locations such as Montmagny and New Liskeard, where participants did feel somewhat closer to and more knowledgeable about the sector, were generally higher across the board, particularly around perceptions of the industry as being innovative and successful. The one exception was in Selkirk, where participants had mixed feelings as to whether the sector could be described as environmentally conscious, with an average score of just 5 out of 10 on this measure.

- The average scores of newcomers also tended to be slightly higher compared to their counterparts in the other sets of Toronto-based groups, especially with respect to impressions of the industry as environmentally conscious and sufficiently regulated. Newcomers more positive assessment of the Canadian agricultural sector reflects their experience in their country of origin where, for most, farming practices were not generally seen to be held to the same standards as they are in Canada.
- In Quebec, the average scores for Montreal were somewhat lower as compared to Montmagny on some of the measures, most notably on a sense that the industry was environmentally conscious. Nevertheless, the average score is just under 6 out of 10, and higher than the ratings provided by participants in Halifax, Selkirk and Vancouver on this dimension.

VI. Knowledge and Understanding of the Agriculture and Agri-Food Sector

Knowledge and Understanding of the Agriculture and Agri-Food Sector

A. Knowledge of and Connection to the Sector

The vast majority of participants clearly felt somewhat distanced from the sector and readily admitted they did not feel well-informed about either basic facts and figures or what's happening in the sector. Many participants, as noted earlier, felt they had little direct connection to the sector, although it was more common among those attending groups held in more rural locations. Some have friends or family members working in agriculture, or had grown up on a farm. More commonly, a number of participants had the opportunity to visit a farm as part of a family or school expedition. However, these farms were usually not all-season working farms, but rather smaller niche operations such as berry or apple farms, pumpkin patches, maple syrup operations or a cabanes à sucre in Eastern/Northern Ontario and Quebec.

For those with friends in the farming sector, many of these were described as 'hobby' farms or organic farming operations. As a result, many do not feel terribly familiar and acknowledge that their views of the sector are primarily influenced by what they hear through the news media such as television, radio and online mostly, on food blogs, as well as documentaries like *Food Inc*.[3] or on shows such as *La semaine verte* or *Découvertes*, which were mentioned in Quebec.

Notably, even as consumers, as underscored by the comment of one participant in Selkirk, below, there is a tendency not to actively connect the dots between the food we see available to us in grocery stores, and how it got there or what was required to produce it, despite all the so-called 'farm to table' campaigns. In fact, it may even be the case that these types of movements or campaigns reinforce existing impressions of the sector which tend to focus on the farms, markets and retailers as the main components of the sector, neglecting the many other facets including transportation, processing facilities, etc.

"I feel agriculture is silent in Canada. You look at how the government in the big hubs like Toronto and Ottawa put out campaigns literally taking people to the farms so they understand we have agriculture in Canada. It was all over the TV. Where do the eggs come from? The supermarket. Where does the meat come from? The supermarket. People don't understand, unless you're from the rural sector."

Even in towns like Selkirk, Manitoba, participants seem somewhat wistful in emphasizing the declining visibility and perceived impact of agriculture on their lives.

"On the Prairies, 70 years ago, every corner had a farm. We used to have 6 to 8 people living on each of the corner sections. Now, with all the changes that are occurring, we might have 2 people living on each section. That reduces their impact on the community. They are less visible. There's less contact. Therefore, they are less a part of the economic picture of the town or city."

[3] Food, Inc. is a 2008 American documentary film directed by Emmy Award-winning filmmaker Robert Kenner. The film examines corporate farming in the United States, concluding that agribusiness produces food that is unhealthy, in a way that is environmentally harmful and abusive of both animals and employees.

1. Basic Facts about the Sector

Participants were asked if they had some sense of the size and contribution of the agriculture and agri-food sector to the Canadian economy. Although many felt the industry should be important or significant, there was a general belief that consolidation in the industry and declining employment prospects probably meant that fewer and fewer Canadians were employed in the sector. Nevertheless, estimates of the number of people employed ranged from 10,000 to 3 million. The wide variability in estimates is linked to a low understanding among participants as to who and what types of organizations and industries are encompassed by the term 'agriculture and agri-food.' When told that about one-in-eight jobs in Canada are in this sector, participants were usually taken aback, feeling this is somewhat higher than they had originally thought.

Similarly, many participants were uncertain as to Canada's heft as an exporter of agricultural and agri-food products in the international marketplace. About as many said Canada was likely a large exporter, mostly due to a perception that Canadian wheat sales represent a large percentage of overall exports, as said it was about average or less than average. So, again, participants were somewhat surprised to discover that Canada ranks as the fifth largest exporter of agricultural and agri-food products in the world. Apart from wheat, participants have some difficulty identifying what other agricultural products contribute to this rather impressive standing.

As an aside, those in the Toronto group comprised of newcomers only agreed that the citizenship materials given to immigrants to Canada should contain more information on the Canadians agricultural and agri-food sector. There was a clear interest in learning more about the sector. Most newcomers were quite vocal and firm in expressing their confidence with the Canadian government, its role and regulation of the sector. This group constitutes a key stakeholder and one which is generally positively disposed to and an advocate for the industry. Comments suggest that many are quite knowledgeable of the sector and seeking opportunities to become involved in the industry. This was the case for newcomers in Toronto as well as in Montreal.

2. Marketing Boards

The majority of participants were aware of marketing boards as a feature of Canada's agricultural production and marketing system. However, many were relatively unfamiliar with the notion of supply management. Once explained, the topic generated animated discussion with many questioning how quotas are set, debating the main benefits of a supply managed system and wondering how people are appointed to the various marketing boards. Some felt that supply management would ensure better quality agricultural products, while others thought it offered protection for domestic agricultural producers against foreign competitors.

Participants had mixed responses as to the impact of supply management on producers. On the positive side, they felt that price controls would benefit producers by offering greater income security. The downside, however, was related to concerns that quotas would be predominantly given to the larger agricultural corporations, with the small, independent, family-owned farm losing out.

"If you remove supply management, the price could drop. Many producers would go bankrupt and the prices would go back up again."

On balance, most participants were of the view that producers were the main beneficiaries of supply management, while consumers generally stood to lose. The drawbacks for consumers were perceived to be:

- less choice;
- restricted competition;
- reduced ability to purchase from a supplier of choice; and
- higher prices.

3. Awareness of the Canada-European Union Trade Agreement

Few indicated they had heard of anything recently in the news about the sector. And, only a very few participants had heard something about a recent agreement with the European Union. Even so, other than its perceived negative impact on fine cheese producers in Quebec, and possible benefit for those in the beef cattle industry, they had no specific knowledge of the terms of the agreement or how it might benefit the Canadian agricultural industry or Canadian consumers. Participants in Quebec were not different in terms of their level of awareness and knowledge of the Agreement.

Once the Canada-European Union Trade Agreement (CETA) was explained, participants were mixed on whether it would result in a net positive or net negative for Canadians. Most took a 'wait and see' attitude, while others expressed concern based on their perception that the North American Free Trade Agreement (NAFTA) has not been seen to yield any significant or obvious benefits for Canadian industry or consumers. Some participants also felt that, given the fact there are fewer, but larger players now dominating the Canadian agricultural sector, the Agreement could lead to price fixing in order to control supply and demand more closely. Ensuring that imported foods still meet Canadian standards was another point raised in opposition to the Agreement.

For some participants, a discussion of this trade agreement led to a sidebar conversation about the benefits of more open trade in agricultural and food products versus the 'eat local' movement. As one participant put it:

> ***"You can't eat only local. If you want a variety of stuff, you need stuff imported. It's your choice."***

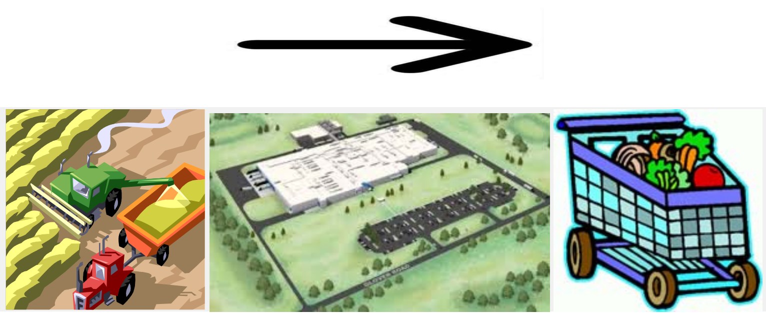
A small contingent of participants expressed generally positive views of the Agreement, on the basis that more competition in the sector, leading to lower food prices, would be a good thing for consumers, both from an economic standpoint, but also in terms of increasing the variety of products to which Canadian consumers have access. The flip side of this argument was, however, that the Agreement may have an adverse effect on Canadian producers who will now face stiffer competition, unless the products being imported are ones that can't be grown in Canada.

Others favoured the Agreement based on their understanding that the European Union has the most stringent GMO regulations in the world. There was also some consensus that CETA would benefit Canada simply by way of reducing our dependence on the American market.

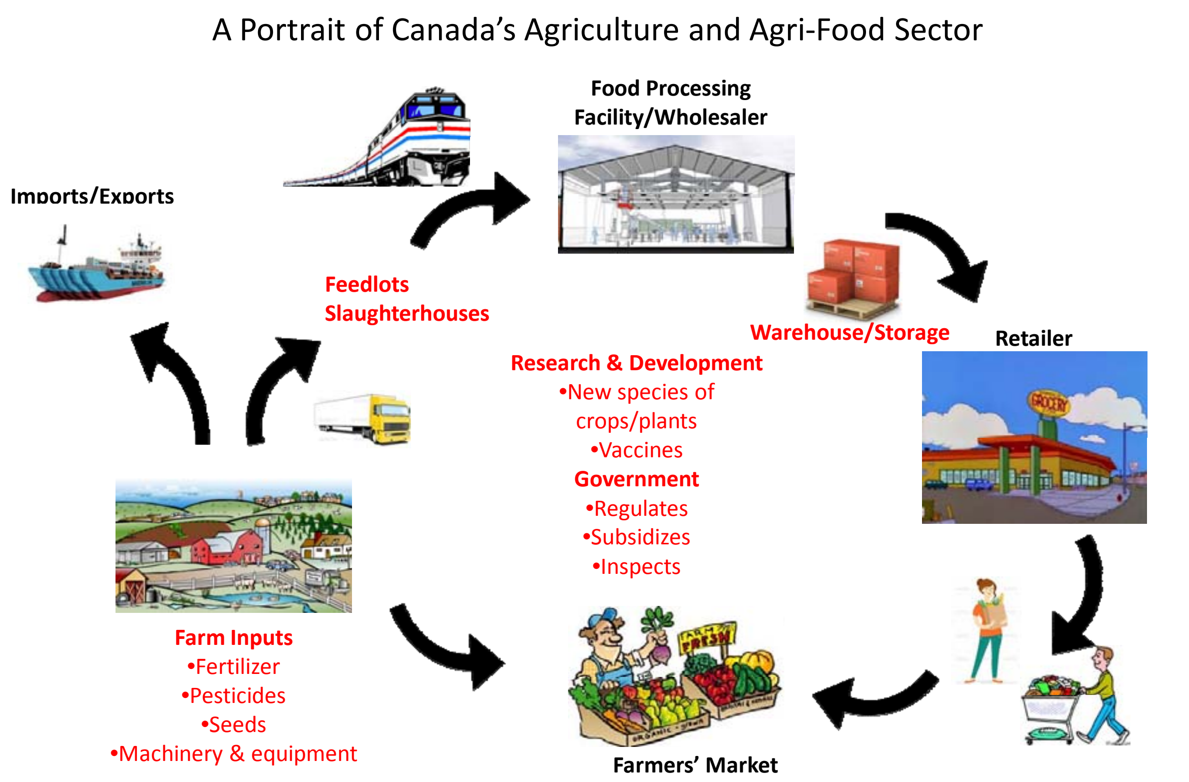
In the end, a number of participants concluded that they ***"trust [the people] who are negotiating these agreements must be doing it in the best interests of this country."*** At the same time, there was a general consensus among participants that better communication of the direct relevance and benefits of these types of trade agreements to Canadian consumers was desirable. Some were critical of both government and the media, suggesting that more effort could be taken to frame the outcomes from these types of trade agreements in a more relatable way for the average Canadian.

B. Understanding of the Entirety of the Sector

To further assess participants' knowledge and understanding of the sector, a portion of the discussion focused on identifying the main components and features of the sector. As stated earlier, this discussion frequently required some prompting to elicit the full array of players, as the general inclination was to think of the industry in three major parts: farms, food processing facilities or distributors, and retailers.



However, when further prompted, participants did begin to develop a more comprehensive picture of the sector, including inputs to the farming operation, transportation and logistics, and exports. This exercise typically required some additional nudging of participants to consider the role of government and research and development within the sector. The graphic shown below illustrates the result of this conversation which was fairly consistent across all groups, with sufficient prompting from the moderator. Those elements highlighted in **RED** depict parts of the sector that were less well known or that participants were less likely to mention without some additional prompting.



1. The Role of Government

Most participants were unlikely to identify government, top-of-mind, as playing a key role in the sector. However, once they began to flesh out the sector in more detail, and with some assistance from the moderator to have participants broaden their thinking beyond the obvious players, participants did suggest that government had a role to play mainly in the following areas:

- food safety;
- taxation;
- negotiating tariffs on imported foods;
- oversight of Marketing Boards (although note that participants had earlier discussed the role of marketing boards in the sector);
- loans and subsidies to farmers; and

- compensation during years when farm operations are affected by poor harvest due to disease or inclement weather.

The majority of participants had difficulty naming the federal department responsible for overseeing the agricultural sector in Canada. There was some confusion with the Canadian Food Inspection Agency, but many simply guessed it must be called the FDA (the acronym for the U.S. Food and Drug Administration), Agriculture, the Department of Agriculture, Fisheries, or Food and Agriculture. In Montmagny, participants were quicker to cite the MAPAQ, Quebec's agricultural ministry.

When specifically told the name of the department – Agriculture and Agri-Food Canada (AAFC) – there appeared to be some confusion about the term "agri-food." Some participants were unclear what this meant, while others thought the term distinguished foods produced from livestock (agriculture) from those produced from fruits, vegetables and grains (agri-food). Still others felt that "agriculture" meant anything that occurred on the farm or before leaving the farm, while everything after that became "agri-food." In line with this view, a number of participants suggested that ***"agriculture is the land where everything is grown. Agri-food is the food part."*** Some participants associated the term "agri-food" with processing, mass production, and products that are not grown in a sustainable way. ***"Agriculture is producing raw materials. And, agri-food is then turning raw materials into food products."***

Of particular interest were the number of participants, not necessarily restricted to any particular group or location, under the impression that AAFC's role and responsibilities also encompassed oversight and regulation of the fisheries and perhaps other natural resources. In some respects this view is perfectly understandable. From the consumer's perspective, the food supply chain comprises all foods including fish and seafood. Their view of Canada's agricultural system and framework is not through the lens of policy-makers and regulators, but rather what the selection of products available to them is at farmer's markets, retail outlets and in the grocery store, and what ends up on their table.

2. The Role of Research and Development

The role of research and development (R&D) within the agricultural and agri-food sector generally tends to be an afterthought for most participants. In the absence of substantial additional prompting, many participants simply overlooked this feature of the industry.

"It's [R&D] is just not visible."

When specifically prompted to consider who or what organizations undertake research and development in this sector, many pointed to the industry such as companies like Monsanto and academic or research institutes. Industry again is usually pointed to in response to a question regarding the source of R&D funding, although some participants believe that government does and should contribute in this area.

In New Liskeard, participants believed that less of the important and valuable R&D was taking place today relative to previous decades. They noted the closure of a number of agricultural colleges in Ontario which not only affected employment and a potentially skilled labour force in the sector, but also the extent of research being carried out. At the same time, these participants did acknowledge the role being played in this area by researchers at Guelph University ("Guelph University is awesome"). These same participants felt that the extent and quality of research may be at risk as universities are challenged to find the funding to engage in this activity.

"I don't think universities don't want to do it … I think they have less money to do it."

There were clear suspicions and participants expressed some skepticism about R&D and its benefits to consumer, at the commencement of a discussion on this topic. For the most part, participants felt that the primary impetus for undertaking R&D in this sector is to increase efficiencies, enhance Canada's competitiveness, increase productivity and produce higher yields or supply. To some extent, there was a sense that some R&D is aimed at improving the quality such as the nutritional benefits and general healthiness of foods to meet changing consumer tastes and demands, by finding ways to reduce the use of chemical fertilizers. This sentiment may be more reflective of participants' desires and expectations, rather than actual knowledge of what is taking place with respect to R&D in the sector.

Participants most often thought that research was predominantly taking place at the input stage i.e., development of new varieties of seeds/crops with the objective of obtaining higher yields or improved weather/pest resistance, and in the transportation and processing of agricultural products, aimed at keeping foods fresher for longer periods of time. In terms of government's role in R&D, a number of participants felt that, apart from some funding to research activities, much of the actual research undertaken by government pertains to examining the implications of various agricultural policies. In essence, government is seen as undertaking research at a more abstract or theoretical level, while companies like ConAgra Foods and Monsanto as well as some of the research institutes are perceived to be undertaking research with more concrete applications.

Within the context of a discussion on R&D, participants were asked to think of ways in which they may have benefited, as consumers, over the last 10 years from advances resulting from research and development in the agricultural and agri-food sector. Few participants could directly link R&D back to themselves, indicating a considerable cognitive gap which is principally a result of a lack of knowledge and an inability to see the direct relevance of R&D in the sector to consumers. When pressed, the kinds of advances participants did mention included things like:

- the ability to purchase fresh agricultural products all year round (which they attributed to advancements in the way in which goods are now transported, and the preservatives used in products while they are being transported long distances, in some cases, the latter advancement being viewed as more of a negative than a positive);
- improvements to farm equipment and machinery (incorporation of GPS technology in planting);
- increasing the shelf life of foods;
- production of genetically modified foods (again not necessarily seen as a positive);

- cloning of plants/crops and the production of new types of foods (packaged foods as well as varieties of vegetables – ***"orange cauliflower … don't know if this is a 'natural' product or not"***);
- production of gluten-free foods to address increased frequency of food allergies in the general population;
- investigation into animal related or animal-borne diseases;
- bio-fuels (ethanol from corn); and
- food labeling, indicating the nutritional value and content of packaged foods and regulations regarding elimination of trans fats in foods.

Participants were asked whether they typically associate R&D in the agricultural and agri-food sector with positive outcomes and benefits to consumers, or whether they would be concerned about the purpose and objectives of the research. This question generated mixed responses. Some participants indicated they would likely feel some concern based on a perception that government was cutting back its role in funding and oversight of R&D. In their view, this would mean that it would be left to companies to self-regulate and that, in addition to the self-interested motivations of the private sector, companies would have no incentive to publicly share the results of proprietary research, particularly if the findings were not favourable to their cause. By contrast, there was a sense that, with government involvement, this would increase the likelihood of having the results of research and development activities shared publicly, regardless of whether the results were favourable or unfavourable, positive or negative. Nevertheless, participants questioned the level of commitment from government to agricultural research and the generally held view was that governments were withdrawing from this area or at least cutting back.

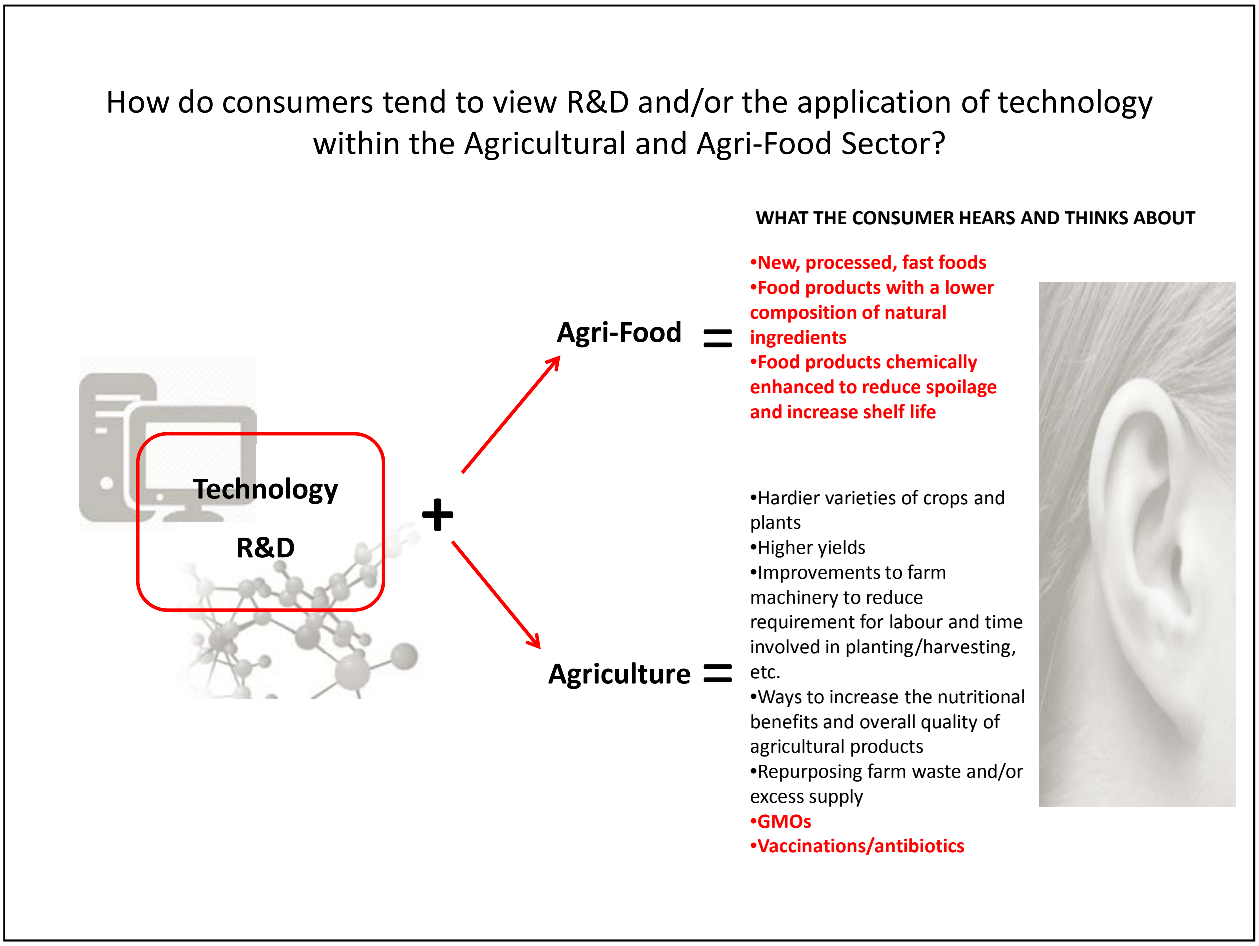
"I think the government is involved in farm input research, but less and less and less. That's what concerns me. I think R&D in products is done more by industries that are not independent. They are in it to make more money."

A number of participants in both groups in Selkirk, Manitoba raised concerns about the increasing practice of monoculture, whereby large farm operations in the area are producing or growing a single crop or species across a large span of farmland and for a number of consecutive years. There is acknowledgement that this practice allows these operations to become much more efficient, due to the standardization in harvesting practices with minimal labour involved. However, participants expressed some concerns about the impact of diseases or pests which could easily and quickly wipe out an entire crop or the entire industry, given the susceptibility of uniform crops to these types of pathogens.

"The industry is motivated to do these things without really understanding the long-term effects."

In summary, if participants' comments are even to some extent representative of the conclusions to which the broader public may leap, R&D without appropriate context and a clear statement of relevance to consumers is certain to raise some alarm bells among the public. There is a natural tendency to be somewhat wary of research taking place in this sector given the concerns that have been raised by media, food writers and experts, documentarians, environmentalists and advocates for the organic and local food movements.

Based on participants' comments, it is also fair to say that concerns are heightened when consumers hear about research in the context of agri-food versus agriculture generally, as the term itself has connotations of bio-engineering, processing or chemical enhancement. The diagram below provides a visual summary of how the public may jump to certain conclusions and/or interpret discussions of R&D and technological advancements in both agriculture and agri-food contexts. The issues highlighted in **RED** reflect the tendency of consumers to leap to more negative assessments, on balance.



VII. Challenges Facing Canada's Agriculture and Agri-Food Sector

Challenges Facing Canada's Agriculture and Agri-Food Sector

A. Challenges

Participants recognized that the sector is facing a number of challenges, although most of those identified focused more so on challenges confronting agricultural producers rather than those on the agri-food side of the business. The challenges identified were varied, but generally could be grouped into a number of broad categories.

Environmental

- Growing in extreme weather conditions, drought, floods, heat, cold
- Unpredictability and intensity of weather
- The Greenhouse effect
- Soil erosion/quality of soil
- Water shortages

Diseases, Insects and Pests

- Improving resistance

The Competitive Environment

- Increasing competition from developing and emerging markets such as China
- Lower prices on some imported goods, compared to those produced domestically
- Access to financing
- Cost of labour and other inputs such as electricity/energy

Demographics and Consumer Tastes

- Increased demand as a result of population growth
- Sophistication of consumers and desire for healthier, more nutritious products
- Labour shortages in the sector
- An aging population

Transportation

- Loss reduction/prevention
- Reducing spoilage
- Just-in-time delivery

B. R&D Solutions

It was difficult for participants to cite specific applications of research and development to the challenges highlighted above. Other than those already raised (see Section V.B.4) pertaining mostly to ways in which the agricultural sector could increase efficiencies and address environmental issues, participants stalled on any ideas as to how R&D was playing or could play a role in respect of many of the other important issues facing the sector.

In Toronto, some participants commented that they suspected there was research going on with respect to producing hardier crops, plants or seeds based on signage posted along Highway 400 indicating that testing was being done. When asked who was likely funding the R&D, government was mentioned along with universities and industry, although it was felt that industries, in partnership with universities, are likely doing the bulk of the research.

Very few participants, across all groups, were aware of specific research projects being undertaken or supported by government. And, as noted earlier, there is a perception that federal government is reducing its funding to agricultural research.

"I think they are doing a very bad communication job."

VIII. Telling Canada's Agriculture and Agri-Food Story

Telling Canada's Agriculture and Agri-Food Story

Participants in all groups were shown a series of educational and marketing tools produced by AAFC. The information shown to participants varied slightly between those groups in and outside of Quebec.

Groups held outside Quebec	Groups in Quebec
• We grow a lot more than you may think (brochure) • Banner ads • We Grow Innovation (video) • Carrot Trimmer (video)*	• Une culture en pleine croissance (brochure) • Banner ads • Des innovations à découvrir (brochure) • Une culture d'innovation (video)

*Note that this video was shown in its unedited form.

The order in which brochures, banner ads and videos were shown was rotated in each group so as to avoid any ordering effect on assessments of their utility and value. Participants were asked to consider each of the tools on their own merit. The discussion of each of the tools was general in nature, but focused on ascertaining participants' level of interest in the information being imparted and preference for the format, e.g., brochure, video, etc.

A. Assessment of Marketing and Educational Tools

Overall, the brochure ***"We grow a lot more than you may think"*** was generally well-received as it contained pertinent and interesting facts and tidbits of information that piqued participants' curiosity about the sector. It's biggest failing, however, was the format (in print) as many participants indicated they would be unlikely to pick the brochure up if they were to come across it, for environmental reasons, but also because the cover page was not sufficiently intriguing or participants were simply more inclined to obtain this type of information in other formats (online, on television, documentaries, etc.).

The video ***"We Grow Innovation"*** received mixed reviews. While its 'story-like' format, outlining innovations taking place in different regions of the country, is of interest, the style of the video worked well for some and was distracting or off-putting for others. Many participants felt that the video would appeal more to those working in the sector, but also thought that innovations described could be re-framed to be made more relevant to consumers.

Many participants were enthralled by the ***"Carrot Trimmer"*** video primarily because it put those doing and benefiting from the research at the center of the piece. Additionally, the video was presented in a style that seemed to speak more directly to the lay person, i.e., someone with a non-research/non-scientific background. It was also praised for its more authentic tone, in that it did not come across as a slick self-promotional piece for AAFC.

In most groups, with the exception of those held in Quebec, the banner ads were generally favoured. The visuals and the play-on-words was intriguing and many participants said the somewhat humourous style of the ads would at least give them pause to discover what they were all about. In Quebec, however, the approach did not appear to work as well. Their curiousity was not sparked and, in fact, some of the imagery and the humour simply did not generate the intended reaction.

Participants in Quebec only were shown the ***"Innovations to Discover"*** brochure which had somewhat narrower appeal as compared to the shorter ***"We grow a lot more than you may think"*** brochure. It did, however, appeal to those seeking more information or depth in the area of agriculture and agri-food.

The chart below summarizes the reactions to each of the tools tested in the groups.

Assessment of Marketing and Educational Tools

We grow a lot more than you may think	**What worked:** • General length of the brochure (a fairly quick read) and layout (easy to scan) • Key facts about the industry – provides information that participants found both surprising and interesting and it puts the industry in a context/perspective • Map showing "Where Ag's At" as a quick synopsis of regional agricultural commodities • The apple/maple leaf on the cover page are distinctly Canadian • Some found it interesting to read about AAFC's vision • The innovative agricultural stories found on the last two pages, particularly the piece on probiotics, turning straw into gold, and thinking outside the beehive. Some also found the visual on this page to be quite striking, driving home the fact that farms and urban centers can co-exist, right next door to each other • Colourful appearance is appealing and eye-catching
	What didn't work as well: • Depending on the audience, perhaps too dense/text driven • Many participants are disinclined to pick up paper copy • Some found it overly-glossy and a bit superficial. There was a concern raised regarding the cost to produce the brochure for mass distribution • The perfection of the apple on the cover of the brochure reinforces concerns about GMO's • Appears to be more directed to urban dwellers
We Grow Innovation	**What worked:** • The relevance of the main message and key facts • Viewed as "straight … to the point"

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- The regional scan allows participants to see what's happening in their province/region
- Leaves participants with a more confident feeling about the industry (i.e., a lot happening) and its profitability

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What didn't work as well:

- Music and pace were distracting and, for some, tended to reinforce its 'propaganda' feel
- Participants were unsure of the purpose of the video (less informational and more overt marketing on behalf of AAFC)
- Perhaps overly hi-tech in approach
- The video game format reduced the authenticity and credibility of the message as coming from the Government of Canada
- Focus seemed to be more on government and less on the individuals working in agriculture. In this respect it seemed more like an infomercial for government (self-promotional)
- Some participants felt the video would benefit from a voice-over
- A few participants suggested the video could be shorter and include an interactive feature for those wanting to know more about a specific province/region/innovation

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<tr><td rowspan="2">Carrot Trimmer</td><td>

What worked:

- Interesting, engaging and informational. "I feel like I'm learning something."
- Speaks more directly to the benefit to consumers
- Tone is more authentic and demonstrates the passion these individuals have for their industry
- While the actual innovation may not have appeared to be very 'high-tech', for some this helped to underscore the message that these individuals are working to improve their industry

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What didn't work as well:

- For some participants, the style was not as engaging as the 'We Grow Innovation' video. It appeals to those seeking more in-depth information on a specific innovation, while 'We Grow Innovation' appeals to those seeking a quick overview
- The nature of the 'innovation' lacks a sort of 'wow' factor in that it seems less innovative and more like an improvement on an existing technology. "It doesn't scream innovation."

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<tr><td rowspan="2">Innovations to Discover</td><td>

What worked:

- Appreciated by those who had a deeper interest in agriculture and agri-food

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What didn't work as well:

- Small number of participants found the bilingual format bothersome
- A number of grammatical errors in the French copy were also noted

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	• Publication was seen as too detailed, requiring too much effort on the part of the reader
Banner Ads	**What worked:** • Clever play-on-words and the visual • Combination of visual and tagline is effective • Participants could see these being used in grocery stores
	What didn't work as well: • Depending on how the banners are used and in what venues (i.e., billboards, transit ads, etc.) they might appear, some participants felt that they would be more intriguing with the inclusion of a short 'agricultural factoid'. Otherwise, there is a risk that the ads could be taken simply as a 'pretty picture'

B. Creating the Story

Having reviewed a number of informational and promotional materials, participants were led through an exercise in which they provided recommendations on the best approach to take in order to raise awareness and understanding of the contribution of Canada's agriculture and agri-food sector to the economy as well as the kinds of research and development that are taking place within the sector. In response, some participants immediately questioned what the actual goal of this type of initiative would be and questioned whether this would be a good or appropriate use of government funding. Others, in the majority, felt there were obvious and important reasons to ensure the public is better informed about the current state of and changes taking place in this sector, if for no other reason than to bolster a sense of public confidence and reinforce the opportunities that exist for skilled workers.

Each element or component of creating the story was considered separately in order to elicit suggestions regarding key messages, spokespeople, format, tone and style. The feedback received on each of these elements is summarized in the chart that follows.

Telling the story of Canadian Agriculture and Agri-Food

Storyline and Key Messages

- How do these innovations affect us as ordinary citizens/consumers?
- Less about the research/technology itself, more about the impact on consumers
- Weave in messages about health and sustainability
- Context/historical perspective
- Show how consumers are connected to this industry (i.e., "everyone has some sort of connection")
- Targeted – regionally specific
- Start the story at the local level, then expand or extend to the national level

From Whose Vantage Point

- Consumers
- Farmers "people getting their hands dirty"
- Scientists
- Researchers (from universities)
- Others who work in the agri-food/food sector (i.e., chefs)
- Show the chain (and connections) between farmer, scientists, retailers, consumers
- Put the farmer at the center – show how various technologies and scientific advancements have improved conditions for the farmer and products for consumers

Enhancing Credibility

- Connecting with the day-to-day lives of consumers
- Making it relevant
- Demonstrating a benefit to consumers/Canadians
- Clearly articulate the goal or purpose – why is this important
- Partnerships (with researchers, farmers, industry)

Telling the story of Canadian Agriculture and Agri-Food

Channels

- Bus shelter/Transit ads
- Billboards/Electronic billboards
- Grocery stores (near the produce)
- Ads in cinemas
- Social media (YouTube – dedicated channel and advertising, Facebook, Blogs)
- Google/MSN advertising
- QR Codes (which would allow consumers to scan and go deeper if they wish)
- Road show (kiosks)
- Earned media (real stories)
- Radio
- Kits for school teachers/students (including quizzes, interactive features, PPT decks, etc.)
- Open Farm days/Farm tours
- Waiting rooms (where people have time to read)
- Documentaries or dedicated shows (i.e., Discovery Channel, Prairie Farm Report)

Format/Tone/Style

- Q&A format (versus statement of facts)
- Serious, but with an element of humour, light-heartedness
- Inject element of surprise (i.e., airbags made of cornstarch, shampoo containing oats)
- Direct
- Optimistic
- Informational/Educational
- Leverage sense of pride
- Genuine
- Authentic
- Real
- Objective ("not a sales job")
- Community-feel
- A quick snapshot – vignette style

Graphics/Visuals/Features

- Attractive and colourful visuals – Food
- Settings that ordinary people can relate to
- Farmers Market
- Typically Canadian
- Include interactive features

Appendix A: Recruiting Scripts

Recruiting Scripts

AAFC Modern Agriculture Focus Groups (FINAL Recruiting Script – Nov. 27, 2013)

RECRUITING SPECIFICATIONS SUMMARY

- There will be a total of 18 focus groups.
- Each group is expected to last 2hours. The groups should be scheduled for 5:30 p.m. and 7:30 p.m in each location.
- Please recruit 10 participants for minimum 8 to show
- Incentives will be $75 per person
- Participants <u>must</u> be comfortable expressing themselves.
- Participants should be made aware that they will be viewing materials (online videos, website, print materials). As such, if they have a visual impairment that would may prohibit or limit the ability of the individual to actively participate in the group discussion, they should be excluded. If participant requires glasses, they should be made aware that they should bring them along to the discussion group.

Specifications for the focus groups are as follows:

REGION	URBAN/RURAL	LOCATION	DATE	TIME	GROUP NUMBER	COMPOSITION
ONTARIO	**Urban**	**Toronto**	**Dec. 2nd**	5:30 p.m.	1	Ages 55+, mixed gender
				7:30 p.m.	2	Ages 35-54, mixed gender
			Dec. 3rd	5:30 p.m.	3	Newcomers, mix of gender and ages
				7:30 p.m.	4	Newcomers, mix of gender and ages
	Rural	**New Liskeard**	**Dec. 9th**	5:30 p.m.	7	Women, mix of ages
				7:30 p.m.	8	Men, mix of ages
ATLANTIC CANADA	**Urban**	**Halifax**	**Dec. 4th**	5:30 p.m.	5	Women, mix of ages
				7:30 p.m.	6	Men, mix of ages
QUEBEC (all groups in French)	**Urban**	**Montreal**	**Dec. 9th**	5:30 p.m.	9	Women, mix of ages
				7:30 p.m.	10	Men, mix of ages
	Rural	**Montmagny**	**Dec. 10th**	5:30 p.m.	11	Mix of genders and ages
				7:30 p.m.	12	Mix of genders and ages

PRAIRIES	**Rural**	**Selkirk**	**Dec. 11th**	5:30 p.m.	13	Women, mix of ages
				7:30 p.m.	14	Men, mix of ages
	Urban	**Calgary**	**Dec. 12th**	5:30 p.m.	15	Ages 18-34, mixed gender
				7:30 p.m.	16	Ages 35-54, mixed gender
BRITISH COLUMBIA	**Urban**	**Vancouver**	**Dec. 16th**	5:30 p.m.	17	Ages 55+, mixed gender
				7:30 p.m.	18	Ages 18-34, mixed gender

RECRUITING SCRIPT (FOR ALL GROUPS)

INTRODUCTION:

Hello/Bonjour, my name is ____________. I'm calling from *The Strategic Counsel*, on behalf of the Government of Canada. We are a national public opinion research firm organizing a series of discussion groups to explore various issues of importance to the country and Canadians.

Your participation is completely voluntary and all your answers are confidential. They will be used for research purposes only. We are simply interested in hearing your opinions. No attempt will be made to sell you anything or change your point of view. And, any personal information that you share with us will remain confidential. The report that is produced from the series of discussion groups we are holding will not contain comments that are attributed to specific individuals.

EXPLAIN FOCUS GROUPS AS NECESSARY: Eight to ten people like you will be taking part, all of them randomly recruited just like you. The format is a "round table" discussion lead by a research professional. For their time, participants will receive an honorarium of $75.

But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix/variety of people in each of the groups. May I ask you a few questions?

Yes **CONTINUE**
No **THANK AND TERMINATE**

PRELIMINARY SCREENING QUESTIONS:

S1. Do you or does anyone in your immediate family work ...(READ LIST)?

❑	In Market Research or Marketing	***IF YES, THANK AND END***
❑	In Public Relations or Media (TV, Print)	***IF YES, THANK AND END***
❑	In Advertising and communications	***IF YES, THANK AND END***
❑	As an employee of a political party	***IF YES, THANK AND END***
❑	In the agricultural sector, including farming, the manufacture and sale of farm implements and equipment or farm supplies, such as fertilizer, pesticides, etc.	***IF YES, THANK AND END***
❑	In food production, manufacturing or processing	***IF YES, THANK AND END***

IF NO TO ALL, CONTINUE.

S2. How old are you? __________ ***RECORD AGE AND CLASSIFY IN GROUPS BELOW.***

❑	Under 18 years of age	***THANK AND END***
❑	18-34 years of age	***CONTINUE***
❑	35-54 years of age	***CONTINUE***
❑	55+	CONTINUE
❑	Prefer not to answer (VOLUNTEERED)	THANK AND END

NOTE THE SPECIFIC AGE BREAKS FOR GROUPS IN TORONTO (NON-NEWCOMERS), CALGARY AND VANCOUVER. ALL OTHER GROUPS SHOULD HAVE GOOD MIX ACROSS ALL AGE RANGES (I.E., AT LEAST 2 PARTICIPANTS FROM EACH ELIGIBLE AGE CATEGORY IN EACH GROUP. NO MORE THAN 2 PARTICIPANTS IN THE 55+ AGE GROUP).

S3. Have you ever attended a consumer group discussion, an interview or survey which was arranged in advance and for which you received a sum of money?

Yes	1	**MAX. ⅓ PER GROUP**
No	2	**GO TO Q1**

S4. How long ago was it? ______________________________

TERMINATE IF IN THE PAST 6 MONTHS

S5. How many consumer discussion groups have you attended in the past 5 years?

____

TERMINATE IF MORE THAN 4 DISCUSSION GROUPS

S6. And on what topics were they?

____

TERMINATE IF ANY ON AGRICULTURE-RELATED TOPIC AREAS

ADDITIONAL RECRUITING CRITERIA:

1. Are you a first generation Canadian? That is, were you born in another country and moved to Canada?

❑	Yes	***CLASSIFY AS POTENTIAL NEWCOMER***	**CONTINUE**
❑	No	***CLASSIFY AS GENERAL POPULATION***	**SKIP TO Q.3**

---

2. How long have you lived in Canada?

❑	Less than 10 years	***CLASSIFY AS NEWCOMER***	**CONTINUE**
❑	10 years or more	***CLASSIFY AS ESTABLISHED***	**CONTINUE**

TWO GROUPS IN TORONTO SHOULD COMPRISE NEWCOMERS ONLY (I.E., THOSE WHO QUALIFY AT Q.1). ALL OTHER GROUPS IN HALIFAX, TORONTO, MONTREAL, CALGARY AND VANCOUVER SHOULD COMPRISE A MINIMUM OF 3 NEWCOMERS PER GROUP (SOME GENDER AND AGE RESTRICTIONS APPLY TO THESE GROUPS AS WELL).

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3. Can you please tell me how would you describe your ethnicity?

❑	Aboriginal	***CONTINUE***
❑	African	***CONTINUE***
❑	Arab	***CONTINUE***
❑	British/European	***CONTINUE***
❑	Canadian	***CONTINUE***
❑	Caribbean	***CONTINUE***
❑	Chinese	***CONTINUE***

❑	Other East/Southeast Asian (e.g. Filipino, Korean, Japanese)	CONTINUE
❑	French	CONTINUE
❑	Latin/Central/South American	CONTINUE
❑	South Asian/East Indian (i.e., Pakistani, Punjabi, East Indian, Tamil)	CONTINUE
❑	Other	CONTINUE

GET A GOOD MIX AS PER RECRUITING CRITERIA FOR EACH GROUP. FOR ALL GROUPS INCLUDING NEWCOMERS OR ESTABLISHED IMMIGRANTS, SKEW SHOULD BE TOWARD NON-BRITISH/EUROPEAN ETHNICITIES. MAXIMUM 2 PER GROUP OF BRITISH/EUROPEAN HERITAGE.

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4. Are you….

❑	Employed full-time	CONTINUE
❑	Employed part-time	CONTINUE
❑	Self-employed	CONTINUE
❑	A college or university student	SKIP TO Q.6 (MAXIMUM 1 PER GROUP)
❑	Not working outside the home but looking for work	SKIP TO Q.6 (MAXIMUM 1 PER GROUP)
❑	Not working outside the home and not looking for work	SKIP TO Q6 (MAXIMUM 1 PER GROUP)
❑	Retired	SKIP TO Q.6 (MAXIMUM 1 PER GROUP)

NOTE THE SPECIFIC AGE BREAKS FOR GROUPS IN TORONTO, CALGARY AND VANCOUVER.

5a. Do you work in the public or private sector?

❑	Public sector (i.e., government, hospital, school, etc.)	CONTINUE
❑	Private sector	CONTINUE

LIMIT PUBLIC SECTOR PARTICIPANTS TO MAXIMUM OF 3 PER GROUP.

5b. Which one of the following best describes the field in which you work?

❑	Health care (includes medical devices and pharmaceuticals)	***CONTINUE***
❑	Education	***CONTINUE***
❑	Manufacturing	***CONTINUE***
❑	Financial services	***CONTINUE***
❑	Information, Communications and Technology (ICT)	***CONTINUE***
❑	Transportation	***CONTINUE***
❑	Resources (i.e., forestry, mining, oil and gas)	***CONTINUE***
❑	Professional Services	***CONTINUE***
❑	Digital media	***CONTINUE***
❑	Other ____	***CONTINUE***

GET A GOOD MIX ACROSS FIELDS IN ALL GROUPS.

---

6. What is your marital status?

❑	Married/common-law	***CONTINUE***
❑	In a relationship or dating	***CONTINUE***
❑	Single (never married and currently not in a relationship or dating)	***CONTINUE***
❑	Divorced/Separated	CONTINUE
❑	Widowed	CONTINUE
❑	Prefer not to answer (VOLUNTEERED)	CONTINUE

GET A GOOD MIX IN ALL GROUPS.

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7. Do you have any children under the age of 18 that live with you in your household?

❑	Yes	*CONTINUE*
❑	No	*CONTINUE*

GET A GOOD MIX IN ALL GROUPS.

---

8. What is the highest level of education that you have completed?

❑	High school or less	*CONTINUE*
❑	Some college	*CONTINUE*
❑	Graduated college	*CONTINUE*
❑	Some university	*CONTINUE*
❑	Undergraduate degree	*CONTINUE*
❑	Graduate degree	*CONTINUE*

GET A GOOD MIX IN ALL GROUPS.

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9. Which of the following best describes your household income?

❑	Less than $25,000	*CONTINUE*
❑	$25,000 - $39,999	*CONTINUE*
❑	$40,000 - $59, 999	*CONTINUE*
❑	$60,000 - $89,999	*CONTINUE*
❑	$90,000 - $99,999	*CONTINUE*
❑	$100,000 - $149,999	*CONTINUE*
❑	$150,000 - $199,999	*CONTINUE*
❑	$200,000 or more	*CONTINUE*
❑	Prefer not to answer (VOLUNTEERED)	*CONTINUE*

GET A GOOD MIX IN ALL GROUPS.

---

10. How often would you say you use the Internet to search for information on topics that interest you?

❑	Never	***CONTINUE***
❑	Rarely	***CONTINUE***
❑	Sometimes	***CONTINUE***
❑	Often	***CONTINUE***
❑	Very often	***CONTINUE***

LIMIT THE NUMBER OF THOSE WHO SAY 'NEVERY/RARELY' TO ONE PER GROUP IN ALL GROUPS.

---

11. Gender (by observation)

❑	Male	***CONTINUE***
❑	Female	***CONTINUE***

50/50 GENDER SPLIT IN ALL GROUPS WITH THE EXCEPTION OF THOSE GROUPS COMPRISING ONLY MEN/WOMEN.

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12. If you won a million dollars what would be the first two things you would do with the money? ***(MUST HAVE TWO RESPONSES TO ACCEPT. <u>TERMINATE</u> IF FLIPPANT, REFUSES TO ANSWER OR EXHIBITS DIFFICULTY IN RESPONDING.)***

13. During the discussion, you could be asked to look at materials that are pinned up on a wall and to read handouts. You will also be asked to actively participate in a conversation about these materials. Can you think of any reason why you may have difficulty reading the materials or participating in the discussion? You may also be asked to write down a few thoughts on paper. Are you comfortable writing in (English/French)?

TERMINATE IF RESPONDENT OFFERS ANY REASON SUCH AS SIGHT OR HEARING PROBLEM, A WRITTEN OR VERBAL LANGUAGE PROBLEM, A CONCERN WITH NOT BEING ABLE TO COMMUNICATE EFFECTIVELY OR IF YOU AS THE INTERVIEWER HAVE A CONCERN ABOUT THE PARTICIPANT'S ABILITY TO PARTICIPATE EFFECTIVELY.

Invitation

As I mentioned earlier, the group discussion will take place the evening of **DATE @ TIME** ***(REFER TO CHART ON PAGE 1)*** **for 2 hours** and participants will receive **$75** for their time. Would you be willing to attend?

Yes	**1**	**CONTINUE**
No	**2**	**THANK AND END**

Prior to the group we will call you to confirm your attendance. May I have the phone number at which it is easiest to reach you?

Phone Number: ______________________________________

E-mail Address: _______________________________________

Please consider this as a firm appointment. We would appreciate it if you would show up for the group at least 10 to 15 minutes early. The discussions will start promptly and late entries will not be permitted. You may be required to view some written material during the course of the discussion. If you need glasses to do so, please be sure to have them handy at the time of the group.

Groupes de discussion sur l'agriculture moderne organisés pour le compte d'Agriculture et Agroalimentaire Canada (AAC) (Script de recrutement FINAL – 27 nov. 2013)

DÉTAILS DU RECRUTEMENT

- Il y aura 18 groupes de discussion en tout.
- La durée prévue de chaque rencontre est de deux heures. Les rencontres doivent avoir lieu à 17 h 30 et à 19 h 30 dans chaque localité.
- Veuillez recruter dix participants afin d'assurer la présence d'au moins huit personnes.
- L'incitatif sera de 75 $ par personne.
- Les participants doivent pouvoir s'exprimer aisément.
- Il faut prévenir les participants qu'on leur présentera du matériel visuel (vidéos en ligne, sites Web, documents imprimés). Par conséquent, toute personne ayant une déficience visuelle pouvant limiter ou empêcher sa participation active à la discussion de groupe devrait être exclue. Il faut rappeler aux participants d'apporter leurs lunettes, s'il y a lieu, le jour de la rencontre.

Caractéristiques des groupes de discussion :

RÉGION	MILIEU URBAIN/RURAL	LIEU	DATE	HEURE	N^{O} DU GROUPE	COMPOSITION
ONTARIO	**Urbain**	**Toronto**	**2 déc.**	17 h 30	1	55 ans et plus, groupe mixte H-F
				19 h 30	2	35 à 54 ans, groupe mixte H-F
			3 déc.	17 h 30	3	Nouveaux arrivants, groupe mixte H-F, tous âges
				19 h 30	4	Nouveaux arrivants, groupe mixte H-F, tous âges
	Rural	**New Liskeard**	**9 déc.**	17 h 30	7	Femmes, tous âges
				19 h 30	8	Hommes, tous âges
CANADA ATLANTIQUE	**Urbain**	**Halifax**	**4 déc.**	17 h 30	5	Femmes, tous âges
				19 h 30	6	Hommes, tous âges
QUÉBEC (tous les groupes seront en français)	**Urbain**	**Montréal**	**9 déc.**	17 h 30	9	Femmes, tous âges
				19 h 30	10	Hommes, tous âges
	Rural	**Montmagny**	**10 déc.**	17 h 30	11	Groupe mixte H-F, tous âges
				19 h 30	12	Groupe mixte H-F, tous âges

PRAIRIES	**Rural**	**Selkirk**	**11 déc.**	17 h 30	13	Femmes, tous âges
				19 h 30	14	Hommes, tous âges
	Urbain	**Calgary**	**12 déc.**	17 h 30	15	18 à 34 ans, groupe mixte H-F
				19 h 30	16	35 à 54 ans, groupe mixte H-F
COLOMBIE-BRITANNIQUE	**Urbain**	**Vancouver**	**16 déc.**	17 h 30	17	55 ans et plus, groupe mixte H-F
				19 h 30	18	18 à 34 ans, groupe mixte H-F

SCRIPT DE RECRUTEMENT (pour tous les groupes)

INTRODUCTION :

Bonjour, mon nom est ___________. Je vous appelle du *Strategic Counsel* pour le compte du gouvernement du Canada. Nous sommes une société canadienne de recherche sur l'opinion publique et nous organisons une série de groupes de discussion afin d'explorer diverses questions d'importance pour le pays et pour les Canadiens.

Votre participation est entièrement volontaire et toutes vos réponses seront confidentielles; elles serviront seulement aux
fins de la recherche. Nous souhaitons simplement connaître votre opinion. Il n'est pas question d'essayer de vous vendre quoi que ce soit ni de changer votre point de vue. Par ailleurs, tout renseignement personnel que vous nous fournirez restera confidentiel. Notre rapport sur cette série de groupes de discussion ne contiendra aucun commentaire attribué à des participants individuels.

EXPLIQUER EN QUOI CONSISTENT LES GROUPES DE DISCUSSION, AU BESOIN : Huit à dix personnes comme vous prendront part au groupe, chacune ayant été recrutée au hasard selon le même processus. La rencontre consistera en une table ronde menée par un spécialiste en recherche. En remerciement de leur temps, les participants recevront une rétribution de 75 $.

Avant de vous inviter à participer, je dois vous poser quelques questions qui nous permettront de former des groupes suffisamment diversifiés. Puis-je vous poser quelques questions?

Oui **CONTINUER**
Non **REMERCIER ET TERMINER**

QUESTIONS DE PRÉSÉLECTION :

S1. Est-ce que vous, ou un membre de votre famille immédiate, travaillez...(LIRE LA LISTE)?

❑	Dans le domaine des études de marché ou du marketing	***SI OUI, REMERCIER ET TERMINER***
❑	Dans le domaine des relations publiques ou des médias (télévision, presse)	***SI OUI, REMERCIER ET TERMINER***
❑	Dans le domaine de la publicité et des communications	***SI OUI, REMERCIER ET TERMINER***
❑	Comme employé dans un parti politique	***SI OUI, REMERCIER ET TERMINER***
❑	Dans le secteur agricole, notamment l'agriculture, la fabrication et la vente de machines et d'équipement agricoles ou de fournitures de ferme, par exemple des engrais, des pesticides, etc.	***SI OUI, REMERCIER ET TERMINER***
❑	Dans le secteur de la production alimentaire, de la fabrication de produits alimentaires or de la transformation des aliments	***SI OUI, REMERCIER ET TERMINER***

SI NON À TOUTES LES QUESTIONS, CONTINUER.

S2. Quel âge avez-vous? __________ ***NOTER L'ÂGE ET COCHER LA CATÉGORIE CORRESPONDANTE CI-DESSOUS.***

❑	Moins de 18 ans	***REMERCIER ET TERMINER***
❑	18 à 34 ans	***CONTINUER***
❑	35 à 54 ans	***CONTINUER***
❑	55 ans ou plus	CONTINUER
❑	Préfère ne pas répondre (DÉCLARATION SPONTANÉE)	REMERCIER ET TERMINER

BIEN NOTER LES INTERVALLES D'ÂGE PRESCRITS POUR LES GROUPES DE TORONTO (À L'EXCLUSION DES GROUPES DE NOUVEAUX ARRIVANTS), CALGARY ET VANCOUVER. TOUS LES AUTRES GROUPES DOIVENT AVOIR UNE COMPOSITION DIVERSIFIÉE SUR LE PLAN DE L'ÂGE (PLUS PRÉCISÉMENT : INCLURE DANS CHAQUE GROUPE AU MOINS DEUX PARTICIPANTS PROVENANT DE CHAQUE CATÉGORIE D'ÂGE ADMISSIBLE. INCLURE AU MAXIMUM DEUX PARTICIPANTS DE LA TRANCHE D'ÂGE DES 55 ANS ET PLUS).

S3. Avez-vous déjà participé à un groupe de discussion de consommateurs, à une entrevue ou à un sondage organisé à l'avance en contrepartie d'une somme d'argent?

Oui	1	**MAX. ⅓ PAR GROUPE**
Non	2	**PASSER À LA Q1**

S4. Il y a combien de temps? ______________________________

TERMINER SI C'ÉTAIT DANS LES SIX DERNIERS MOIS

S5. À combien de groupes de discussion de consommateurs avez-vous participé au cours des cinq dernières années?

____

TERMINER SI LE RÉPONDANT A PARTICIPÉ À PLUS DE QUATRE GROUPES DE DISCUSSION

S6. Sur quels sujets portaient-ils?

____

TERMINER SI CERTAINS SUJETS ÉTAIENT LIÉS À L'AGRICULTURE

CRITÈRES DE RECRUTEMENT SUPPLÉMENTAIRES :

1. Êtes-vous un Canadien / une Canadienne de première génération? Autrement dit, êtes-vous né dans un autre pays et avez-vous déménagé au Canada?

❑	Oui	***CLASSER COMME NOUVEL ARRIVANT POTENTIEL***	**CONTINUER**
❑	Non	***CLASSER DANS LA POPULATION GÉNÉRALE***	**PASSER À LA Q.3**

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2. Depuis combien de temps habitez-vous au Canada?

❑	Moins de dix ans	***CLASSER COMME NOUVEL ARRIVANT***	**CONTINUER**
❑	Dix ans ou plus	***CLASSER COMME ÉTANT ÉTABLI***	**CONTINUER**

DEUX DES GROUPES DE TORONTO SE COMPOSERONT UNIQUEMENT DE NOUVEAUX ARRIVANTS (C.-À-D., DE PERSONNES AYANT RÉPONDU OUI À LA Q.2). TOUS LES AUTRES GROUPES TENUS À HALIFAX, TORONTO, MONTRÉAL, CALGARY ET VANCOUVER DOIVENT INCLURE AU MOINS TROIS NOUVEAUX ARRIVANTS PAR GROUPE (DES RESTRICTIONS LIÉES AU SEXE ET À L'ÂGE S'APPLIQUENT ÉGALEMENT À CES GROUPES).

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3. Pourriez-vous me dire comment vous décririez votre appartenance ethnique?

❑	Autochtone	***CONTINUER***
❑	Africaine	***CONTINUER***
❑	Arabe	***CONTINUER***
❑	Britannique ou européenne	***CONTINUER***
❑	Canadienne	***CONTINUER***
❑	Caraïbéenne	***CONTINUER***
❑	Chinoise	***CONTINUER***

❑	Est-asiatique ou sud-est asiatique (p. ex. : philippine, coréenne, japonaise)	***CONTINUER***
❑	Française	***CONTINUER***
❑	Latino-américaine, centraméricaine ou sud-américaine	***CONTINUER***
❑	Sud-asiatique ou indienne d'Asie (p. ex. : pakistanaise, punjabi, indienne d'Asie, tamile)	***CONTINUER***
❑	Autre	***CONTINUER***

ASSURER UNE COMPOSITION DIVERSIFIÉE EN SUIVANT LES CRITÈRES DE RECRUTEMENT FOURNIS POUR CHAQUE GROUPE. POUR TOUS LES GROUPES QUI COMPRENNENT DE NOUVEAUX ARRIVANTS OU DES IMMIGRANTS ÉTABLIS, PRIVILÉGIER LES ETHNICITÉS NON BRITANNIQUES OU NON EUROPÉENNES. INCLURE AU MAXIMUM DEUX PERSONNES PAR GROUPE D'ORIGINE BRITANNIQUE OU EUROPÉENNE.

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4. Est-ce que ….

❑	Vous avez un emploi à temps plein	***CONTINUER***
❑	Vous avez un emploi à temps partiel	***CONTINUER***
❑	Vous êtes travailleur autonome / travailleuse autonome	***CONTINUER***
❑	Vous êtes étudiant / étudiante au niveau collégial ou universitaire	***PASSER À LA Q.6 (MAXIMUM 1 PAR GROUPE)***
❑	Vous ne travaillez pas à l'extérieur de la maison mais cherchez du travail	***PASSER À LA Q.6 (MAXIMUM 1 PAR GROUPE)***
❑	Vous ne travaillez pas à l'extérieur de la maison et ne cherchez pas de travail	***PASSER À LA Q.6 (MAXIMUM 1 PAR GROUPE)***
❑	Vous êtes à la retraite	***PASSER À LA Q.6 (MAXIMUM 1 PAR GROUPE)***

BIEN NOTER LES INTERVALLES D'ÂGE PRESCRITS POUR LES GROUPES DE TORONTO, CALGARY ET VANCOUVER.

5a. Travaillez-vous dans le secteur public ou dans le secteur privé?

❑	Secteur public (p. ex., gouvernement, hôpital, école, etc.)	***CONTINUER***
❑	Secteur privé	***CONTINUER***

POUR CHAQUE GROUPE, LIMITER À TROIS LE NOMBRE DE PARTICIPANTS DU SECTEUR PUBLIC.

5b. Lequel des secteurs d'activité suivants décrit le mieux le domaine dans lequel vous travaillez?

❑	Soins de santé (y compris les matériels médicaux et les produits pharmaceutiques)	***CONTINUE***
❑	Éducation	***CONTINUE***
❑	Fabrication	***CONTINUE***
❑	Services financiers	***CONTINUE***
❑	Information, communications et technologie (ICT)	***CONTINUE***
❑	Transports	***CONTINUE***
❑	Ressources (p. ex. : foresterie, exploitation minière, pétrole et gaz)	***CONTINUE***
❑	Services professionnels	***CONTINUE***
❑	Médias numériques	***CONTINUE***
❑	Autres secteurs ____	***CONTINUE***

POUR TOUS LES GROUPES, ASSURER UNE COMPOSITION DIVERSIFIÉE EN TERMES DE SECTEURS D'ACTIVITÉ.

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6. Quel est votre état matrimonial?

❑	Marié ou vivant en union de fait	***CONTINUER***
❑	En couple ou fréquentant quelqu'un	***CONTINUER***
❑	Célibataire (n'a jamais été marié, n'est pas dans une relation de couple et ne fréquente personne actuellement)	***CONTINUER***
❑	Divorcé ou séparé	CONTINUER
❑	Veuf / veuve	CONTINUER
❑	Préfère ne pas répondre (DÉCLARATION SPONTANÉE)	CONTINUER

ASSURER UNE COMPOSITION DIVERSIFIÉE POUR TOUS LES GROUPES.

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7. Avez-vous des enfants de moins de 18 ans qui vivent avec vous?

❑	Oui	***CONTINUER***
❑	Non	***CONTINUER***

ASSURER UNE COMPOSITION DIVERSIFIÉE POUR TOUS LES GROUPES.

---

8. Quel est le plus haut niveau de scolarité que vous avez atteint?

❑	Études secondaires ou moins	***CONTINUER***
❑	Études collégiales non complétées	***CONTINUER***
❑	Diplôme d'études collégiales	***CONTINUER***
❑	Études universitaires non complétées	***CONTINUER***
❑	Diplôme de premier cycle	***CONTINUER***
❑	Diplôme d'études supérieures	***CONTINUER***

ASSURER UNE COMPOSITION DIVERSIFIÉE POUR TOUS LES GROUPES.

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9. Laquelle des catégories suivantes décrit le mieux le revenu de votre ménage?

❑	Moins de 25 000 $	***CONTINUER***
❑	25 000 à 39 999 $	***CONTINUER***
❑	40 000 à 59 999 $	***CONTINUER***
❑	60 000 à 89 999 $	***CONTINUER***
❑	90 000 à 99 999 $	***CONTINUER***
❑	100 000 à 149 999 $	***CONTINUER***
❑	150 000 à 199 999 $	***CONTINUER***
❑	200 000 ou plus	***CONTINUER***
❑	Préfère ne pas répondre (DÉCLARATION SPONTANÉE)	***CONTINUER***

ASSURER UNE COMPOSITION DIVERSIFIÉE POUR TOUS LES GROUPES.

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10. À quelle fréquence diriez-vous que vous utilisez Internet pour chercher de l'information sur des sujets qui vous intéressent?

❑	Jamais	***CONTINUER***
❑	Rarement	***CONTINUER***
❑	Quelquefois	***CONTINUER***
❑	Souvent	***CONTINUER***
❑	Très souvent	***CONTINUER***

POUR TOUS LES GROUPES, LIMITER LE NOMBRE DE PERSONNES QUI RÉPONDENT « JAMAIS » OU « RAREMENT » À UNE PAR GROUPE.

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11. Sexe (d'après observation)

❑	Homme	***CONTINUER***
❑	Femme	***CONTINUER***

ASSURER UNE PROPORTION ÉGALE D'HOMMES ET DE FEMMES DANS TOUS LES GROUPES À L'EXCEPTION DES GROUPES UNISEXES.

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12. **S'il vous arrivait de gagner un million de dollars, quelles sont les deux premières choses que vous feriez avec cet argent?** ***(DOIT DONNER DEUX RÉPONSES POUR ÊTRE ACCEPTÉ. TERMINER SI LE RÉPONDANT DÉMONTRE PEU DE SÉRIEUX, REFUSE DE RÉPONDRE OU A DE LA DIFFICULTÉ À RÉPONDRE.)***

13. Au cours de la discussion, vous pourriez avoir à examiner du matériel affiché au mur et à lire de la documentation. On vous demandera également de participer activement aux discussions portant sur ce matériel. Pensez-vous avoir de la difficulté, pour une raison ou une autre, à lire les documents ou à participer à la discussion? On pourrait aussi vous demander de noter quelques réflexions sur papier. Êtes-vous à l'aise pour écrire en (anglais/français)?

TERMINER SI LE RÉPONDANT SIGNALE UN PROBLÈME DE VISION OU D'AUDITION, UN PROBLÈME DE LANGUE PARLÉE OU ÉCRITE, S'IL CRAINT DE NE POUVOIR COMMUNIQUER EFFICACEMENT, OU SI VOUS, EN TANT QU'INTERVIEWEUR, AVEZ DES DOUTES QUANT À SA CAPACITÉ DE PARTICIPER EFFICACEMENT AUX DISCUSSIONS.

Invitation

Comme je l'ai mentionné plus tôt, le groupe de discussion aura lieu le soir du **DATE à HEURE *(SE REPORTER AU TABLEAU DE LA PAGE 1)* et durera deux heures.** Les membres de groupe recevront chacun **75 $** en remerciement de leur participation. Est-ce que vous accepteriez de participer?

Oui	**1**	**CONTINUER**
Non	**2**	**REMERCIER ET TERMINER**

Nous vous appellerons avant la rencontre afin de confirmer votre présence. Pourrais-je avoir le numéro de téléphone où vous êtes le plus facile à joindre?

Numéro de téléphone : ____

Courriel : ____

Veuillez considérer ce rendez-vous comme ferme. Nous vous prions d'être sur les lieux au moins dix à quinze minutes avant le début de la rencontre. Les discussions commenceront à l'heure et les retardataires ne seront pas admis. Vous pourriez avoir à examiner des documents écrits au cours de la rencontre. Si vous portez des lunettes, assurez-vous de les avoir avec vous le soir de la discussion.

Appendix B: Moderator's Guides

Moderator's Guides

AAFC MODERN AGRICULTURE FOCUS GROUPS
Moderator's Guide
FINAL 2 – Dec. 3rd, 2013

INTRODUCTION (10 MINUTES) – 5:30/7:30

- Introduce moderator and welcome participants to the focus group.
  - As we indicated during the recruiting process, we are conducting focus group discussions on behalf of the Government of Canada.
  - Before we begin the discussion I'd like to take a few minutes to brief you on how a focus group works, for those of you who haven't attended one before.

- The discussion will last approximately 2 hours. Feel free to excuse yourself during the session if necessary.

- Explanation re:
  - Audio/video-taping – The session is being video/audio-taped for analysis purposes, in case we need to double-check the proceedings against our notes. These video-tapes remain in our possession and will not be released to anyone without written consent from all participants. Can I confirm that all of you have signed the consent form permitting us to videotape and record the proceedings?
  - One-way mirror – There are observers behind the glass who represent the government and others who are working either directly or indirectly on the topics and materials we'll be discussing.
  - Confidentiality – Please note that anything you say during these groups will be held in the strictest confidence. We do not attribute comments to specific people. Our report summarizes the findings from the groups, but does not mention anyone by name. The results will be grouped together and reported on as a whole, rather than on a group-by-group basis. And, it can be accessed through the Library of Parliament or Archives Canada. Please see me at the end of the group if you wish more information on how to access the report.

- Describe how a discussion group functions:
  - Discussion groups are designed to stimulate an open and honest discussion. My role as a moderator is to guide the discussion and encourage everyone to participate. Another function of the moderator is to ensure that the discussion stays on topic and on time.
  - Your role is to answer questions and voice your opinions. We are looking for minority as well as majority opinion in a focus group, so don't hold back if you have a comment but feel that your opinion may be different from others in the group. There may or may not be others who share your point of view. Everyone's opinion is important and should be respected. We want to hear from everyone around the table.
  - I would also like to stress that there are no wrong answers. We are simply looking for your opinions and attitudes. This is not a test of your knowledge. We did not expect you to do anything in preparation for this group.

- Please note that the moderator is not an employee of the Government of Canada and may not be able to answer some of your questions about the program we will be discussing. If important questions do come up over the course of the group, we will try to get answers for you before you leave. **(NOTE TO MODERATORS: PARTICIPANTS SHOULD BE INFORMED <u>AT THE END OF THE GROUP</u> (ESPECIALLY IF THERE ARE QUESTIONS) THAT MANY OF THE ANSWERS CAN BE FOUND AT www.agr.gc.ca, A GOVERNMENT OF CANADA WEBSITE).**

- (Moderator introduces herself/himself). Participants should introduce themselves, using their first names only. Please tell me a little bit about yourself – a 30 second introduction.

WARM-UP (10 MINUTES) – 5:40/7:40

- To start the discussion, I'd like to get your impressions on certain features of the economy. Let's do this in stages. First, take the paper and pen in front of you and draw 2 vertical lines on the page to create 3 columns. Label your 3 columns – PAST, PRESENT, AND FUTURE.
    - In the first column, write down what you think were the 3 most important sectors or industries to the Canadian economy in the past – say 20 or 30 years ago. NOTE: MODERATOR TO EXPLAIN WHAT IS MEANT BY SECTOR (I.E., NOT BROAD SECTOR SUCH AS MANUFACTURING OR SERVICES, MORE PRECISE).
    - In the second column write down the 3 most important sectors or industries that you believe are making a significant contribution to the Canadian economy (at the national level) today.
    - Finally, in the third column write down the 3 sectors that you feel will be most vital to the Canadian economy in the future – say over the next 2-3 decades. Which sectors or industries do you think will be most important? DISCUSS PARTICIPANTS' VIEWS AMONG LARGE GROUP
- If I had asked you to write down the 3 most important sectors or industries that you believe contribute significantly to the [**name of province**] economy today, would they be the same ones you have written in your second column? Discuss.
- When you are thinking about those sectors or industries that make an important contribution to our economy, whether in the past, present or future, how are you making this determination? What are you taking into account? How do you define "significant contribution"? PROBE FOR:
    - % contribution to GDP
    - Employment/jobs created (directly/indirectly)
    - Size of sector (revenues)
    - Vitality of sector
    - Importance to a thriving/healthy society
    - Level of trade/international exports
- Now, let me ask you a slightly different question. When you think of 'modern or innovative' industries or sectors of the economy, which ones are most top-of-mind for you? List and discuss responses. PROBE FOR:
    - Why would you describe this industry/sector as modern or innovative? What is happening in that sector? What makes it modern/innovative, in your view?

IMPORTANCE AND IMPRESSIONS OF AGRICULTURE & AGRI-FOOD SECTOR (20 MINUTES) – 5:50/7:50

- DEPENDING ON RESPONSES TO PREVIOUS QUESTIONS: Where does the agricultural and agri-food sector fit in terms of the contribution it makes to the national/provincial economy? How important is it? PROBE FOR:
    - Do you feel this sector is growing or declining in Canada/in your province? Explain.
    - What do you think the outlook is for this sector in the next 2-3 decades? Explain.
- **INDIVIDUAL IMAGE ASSOCIATION EXERCISE:** We're going to be spending the remainder of our time this evening talking about the agricultural and agri-food sector. So, let's spend a few minutes getting your impressions of this sector. I want you to take a moment and tell me what pictures or images pop into your head when I mention agriculture and agri-food, as an industry or sector. I don't want you to think about words, but more about images and pictures … what is the image that you see in your head … the one (or several) that you mostly associate with this sector. Does everyone have a picture (pictures) formed in their head now? Let's go around the table and have each of you verbally draw that picture for me. ROUND TABLE DISCUSSION.
- Continuing in this vein, if you were to describe this sector, what words would you use? What words come to mind when you think about agriculture and agri-food? UNPROMPTED DISCUSSION. GENERATE WORDS AND LIST ON FLIP CHART. PROBE FOR:
    - Supply management – Have you heard of this term? What does it mean? EXPLAIN SUPPLY MANAGEMENT IF NECESSARY. **[In Canada, certain parts of the agricultural sector (i.e., eggs, chicken, dairy and turkey industries) operate under what is called a supply management system. This means that the system is controlled by either a national or provincial marketing board that sets quotas for the amount of a commodity that can be marketed by producers. The goal is to stabilize the price at**

which the farmer sells his product and avoid wild market fluctuations, providing income security for farmers without the use of subsidies. In addition, under supply management tariffs are applied to limit the volume of imports into Canada of products that are produced in Canada.] Generally, is this a positive or a negative for producers? What about for consumers?

- **INDIVIDUAL ASSIGNMENT:** Now, I'd like to pass out a short assignment for each of you to complete, individually. You will notice that the questions ask you to indicate how you would rate the sector along a spectrum of dimensions. EXPLAIN AND GIVE PARTICIPANTS APPROX. 5 MINUTES TO COMPLETE. DISCUSS RATINGS FOR EACH DIMENSION. PROBE FOR:
  - o How many gave it a rating of 8-10 on [insert dimension]? What did you consider when you gave this rating?
  - o How many gave it a rating of 5 or below on [insert dimension]? What did you consider when you gave this rating?

KNOWLEDGE OF THE AGRICULTURE & AGRI-FOOD SECTOR (25 MINUTES) – 6:10/8:10

- Before we continue to explore your impressions and views of this sector, I'd like to get some sense of how familiar you are with this sector. How knowledgeable would you say you are? How much would you say you know about this sector? Are you very knowledgeable, somewhat, not very knowledgeable, not at all knowledgeable? Probe for:
  - o In what ways do you interact with this sector? (PROBE FOR: Only at the grocery store/market, via friends who farm/friends in the industry.) How many of you have ever visited a farm or an agricultural producer? What about any other type of agricultural or agri-food facility?
  - o How do you get information on this sector … on what's happening in this sector in Canada/your province? Where would you typically go to get information? What sources would you use? List.
- **LARGE GROUP EXERCISE:** Let's take a moment to draw a sketch (an overview) of what this sector looks like and what the sector encompasses or includes. Can you tell me what the key parts of this sector are? MODERATOR TO DRAW A DIAGRAM OF THE SECTOR BASED ON DIRECTIONS FROM GROUP. KEEP THIS DIAGRAM ON THE WALL FOR REMAINDER OF SESSION. DEPENDING ON WHAT THE GROUP INCLUDES IN THE PICTURE, PROBE FOR:
  - o Where does each of the following fit in this picture?
    - ▪ Scientists, researchers
    - ▪ Agriculture and Agri-Food Canada (what is its role?)
    - ▪ Transportation
    - ▪ Trade/exports
    - ▪ Wholesalers
    - ▪ Retailers
    - ▪ What about the inputs like fuel, fertilizers, etc. that go into farming?
  - o What are the parts of the sector that we tend to think less about or are simply not as top-of-mind for us?
  - o Can you guess how many Canadians are currently working in this sector in some capacity? MODERATOR TO EXPLAIN THAT 2.1 MILLION CANADIANS ARE EMPLOYED IN THIS SECTOR (1 IN 8 JOBS). Does that surprise you?
  - o What about trade? Is Canada a large agricultural exporter in your view? What are some of the agricultural products that Canada is best known for around the world? MODERATOR TO EXPLAIN THAT CANADA IS THE 5TH LARGEST AGRICULTURAL EXPORTER IN THE WORLD. Does this surprise you?
- Have you heard anything recently in the media about this sector? Elaborate. PROBE FOR:
  - o Have any of you heard anything about the Canada-European Union Comprehensive Economic Trade Agreement (CETA)? What do you know about it? Do you see this agreement as a positive or negative for Canada? Explain.
  - o How does/will it impact the agriculture and agri-food sector? How does it benefit ordinary Canadians, like you? Explain. IF GROUP HAS NOT HEARD MUCH ABOUT CETA, OFFER EXPLANATION BELOW:
    - ▪ **CETA IS A TRADE AGREEMENT RECENTLY REACHED BETWEEN CANADA AND THE EUROPEAN UNION. IT IS THE FIRST BILATERAL FREE TRADE AGREEMENT BETWEEN THE EUROPEAN**

UNION AND A G8 COUNTRY. THE AGREEMENT IS WIDE-RANGING, COVERING EVERYTHING FROM THE AUTOMOTIVE SECTOR TO AGRICULTURAL TARIFFS AND INTELLECTUAL PROPERTY. FOR EXAMPLE, IT REMOVES 99% OF TARIFFS BETWEEN THE TWO ECONOMIES, WHICH SHOULD BENEFIT CANADIAN AGRICULTURE. MUCH LIKE NAFTA, THIS AGREEMENT WILL GIVE CANADIAN COMPANIES MUCH BETTER ACCESS TO EUROPEAN MARKETS AND VICE VERSA. [MODERATOR TO EXPLAIN G8 AND NAFTA AS NECESSARY.]

  - On balance, who do you think stands to benefit from this agreement more – Canada or the European Union? Why do you say that?

- In the first assignment you were asked to rate Canada's agricultural and agri-food sector in terms of it being modern or innovative. If I draw a horizontal line on the flip chart with the two end points being '***a 20th century industry, one that hasn't changed much in the last 20-25 years'*** and a '***21st century, progressive industry, one that is changing significantly***,' where would you put agricultural and agri-food along this spectrum? MODERATOR TO DRAW HORIZONTAL LINE ON FLIP CHART WITH TWO END-POINTS LABELED AS INDICATED. Why do you say that? PROBE FOR:
  - What would it take for you to consider this sector to be further to the right along this spectrum (i.e., to be seen as more of a modern, progressive and innovative sector)? What kinds of changes does it need to make, how does it need to adapt, how would it be different?
  - What would the features of a modern, progressive agricultural and agri-food sector be?
- Do you think that science, research and innovation are an important feature of this sector? Why/why not? PROBE FOR:
  - To what extent do you think research, science, innovation and technology play a role in the agricultural and agri-food sector?
  - When we talk about innovation and technology in association with agriculture, is your first blush response a negative or positive one? Elaborate.
  - Do you feel you have a good understanding of how science and innovation contribute to our evolving agriculture and agri-food sector? Explain. PROBE FOR:
    - Why would it be important for the Canadian agricultural and agri-food sector to continue to innovate over the coming decades? What are some of the challenges you think this sector will have to meet in the future? And, how can research, science and innovation help to meet those challenges? Where do you think the push for innovation and transformation of the sector is mostly coming from? PROBE FOR:
      - Increased profitability – how should we respond?
      - Increased competitiveness against low cost food producers in emerging markets – how should we respond?
      - Evolving consumer preferences – how should we respond?
      - Sustainability/stewardship of environment and resources – how should we respond?
      - Growing in diverse climatic conditions
  - In what ways is this sector modern? Are there examples of how research, science and innovation have had an impact in this sector? Can you think of some relatively recent innovations in this sector (say over the last 50 years or so)? How has research and development (R&D) contributed to improvements in this sector? PROBE FOR:
    - What parts of the sector have undergone the most innovation? If we go back to the diagram of the sector that we drew earlier, can you identify for me some of the innovations that have taken place in each part of this sector?
  - Are there any innovations that you and other consumers have benefited from personally? List. PROBE FOR:
    - Drought resistant farming techniques
    - Increased crop yields (faster growing cycles for some crops, development of bio-pesticides, etc.)
    - Producing foods with higher nutritional benefits
    - Environmentally sound agricultural practices
  - Who or what is the biggest player in agricultural research in this country? PROBE FOR:
    - How do you see the role of AAFC in research? What is it doing/should it be doing?

  - Are supply managed systems, such as those we discussed earlier, a feature of a modern, progressive agricultural and agri-food system? Why/why not? Elaborate.

TELLING THE AGRICULTURE AND AGRI-FOOD STORY (30 MINUTES) – 6:35/8:35

- **LARGE GROUP EXERCISE**: Just to finish off this section let's try to create a bit of a story about Canadian agriculture and the agri-food sector. Say, we have all been asked to develop an information tool to tell people more about how Canada's agriculture and agri-food sector is modernizing and the ways in which it has and is evolving – your objective is to make this sector look, sound and feel like it's important and progressive. Before you create the actual story, you need to develop the concept. I'll give each of you a few pages that contain the instructions and some materials that you might want to refer to when we are developing a story concept. We need to think about how we are going to tell this story. And, we can be as creative and innovative as we want to be. Here's what you need to think about? MODERATOR TO PASS OUT KITS AND POST THE BOLDED WORDS BELOW ON FLIP CHART AS REMINDER TO GROUPS:
  - First, we want to make sure that we grab their attention, make the story interesting and relevant to them. So, think of way you would do this. What's the best way to engage people?
  - All stories have certain elements to them:
    - **A great opening line, picture or scene** … again something that gets the audience's attention right away and makes them want to continue listening.
    - A protagonist, narrator or somebody/something that is at the center of the story … so you need to think about **who's or what's going to be at the center of your story**. From what perspective do you want to tell this story?
    - Finally, what kind of information would you want to include in the story – these are facts, figures, topics, general information. What is going to be the focus of your story? **What kinds of topics would you cover**? What are the key messages that you would want to include? How does the plot flow generally? (Even if you don't have all the facts, simply make a note about the things you want to include. For example, what would you like to hear more about?)
    - Next, **how will you tell the story** … **what's the vehicle**? This doesn't have to be in book format, although it could. What other options would you consider? For example, you could make a video, animated cartoon, a graphical novel, or a documentary … it's up to you to decide?
    - Then, you'll need to think about the **tone and the style** … the way you want to present your story? Should the story be humourous, serious, suspenseful/a mystery … how do you want to do this.
    - Finally, what **pictures or images** do you want to include that will support your story?
  - So, let's start. We're not looking for a final, completed story, but I want to make sure we address all the elements in our plan. (MODERATOR TO STEER PARTICIPANTS AWAY FROM ISSUES SUCH AS GENETICALLY MODIFIED FOODS AND FOOD SAFETY – THESE ARE UNDER PURVIEW OF HEALTH/CFIA, ALTHOUGH GMO'S MAY COME UP AS PART OF A MODERN, INNOVATIVE SECTOR IN A POSTIVE WAY.)
- PROBE FOR:
  - In creating these stories what is the best way to underscore the importance of agriculture and agri-food to the Canadian economy? What are some approaches we could take? How do you make this sector more relevant to people like you?
  - Does the farmer play a key role in telling this story?
  - Is government part of this story? Is anyone interested in knowing more about the role of government? What is the role of government specifically in transforming this sector? What's the best way of weaving this into the story? How should we be talking about the role of the federal government? What is it that you think the public needs to know more about in terms of government's role?
  - What are the questions or topics that most interest us in terms of this sector? Or, we could add new ones. What are the top 5 questions or topics you would like to know more about in terms of how this sector is modernizing and transforming? What do you think the general public would be interested in learning more about?

- MODERATOR TO HAND OUT '*WE GROW A LOT MORE THAN YOU THINK*' BROCHURE. Here is a very short brochure that AAFC has produced as a means of telling the story. Take a moment to flip through it. How does it compare to what we have generated in terms of our story concept? PROBE FOR:
  - Is it taking the right approach?
  - Does it contain the right kind of information to help tell the story of modernization? What's missing?
  - Which section of the brochure interested you most? PROBE FOR:
    - Do the stories about magic beans, probiotics, and bees interest you? Explain.

INNOVATION IN AGRICULTURE – GETTING THE MESSAGE/STORY OUT (20 MINUTES) – 7:05/9:05

- I'd like to show you a short 4-minute video about innovation in the agricultural sector. MODERATOR TO PLAY VIDEO TITLED '*WE GROW INNOVATION*.' What's your overall reaction to this video? Probe for:
  - Did you like it/dislike it?
  - Did you find it informative or not?
  - Is it a useful information tool?
  - Was there anything you found surprising? Explain. What was the most surprising piece of information … something you didn't know about … that you took away from this video?
  - Does it spark your interest in knowing more about the sector? What specifically would you like to know more about?
- IF TIME PERMITS, PLAY SECOND VIDEO TITLED *'CARROT TRIMMER'*. ASK SAME SERIES OF QUESTIONS AS ABOVE.
- Now, thinking of this format – a video – how does this compare to other formats for getting information out to the general public? What are the best ways of sharing stories about innovation taking place in this sector and for helping you to better understand what's going on in the sector? GENERATE LIST. PROBE FOR REACTION TO:
  - Brochures/mailers
  - Mobile applications
  - Twitter feed
  - Facebook – what kind of content would be interesting to share on Facebook or by e-mail?Anything else?
  - Push e-mails
  - Subscriber website (via AAFC website)
  - YouTube – would you be interested in subscribing to a Youtube channel where people spoke about advances in this sector?
  - Open farm days – what do you think of this idea? Would you participate?
  - Grocery stores – what kind of presence?
  - Marketplaces – what kind of presence?
  - Booths/kiosks – where should they be set up?
  - Special exhibits in museums (i.e., Science/Technology museums)
- Going back to the story concepts that you developed … let's think again about the best way of getting people's attention on this topic? Is this an interesting or boring topic to talk about? Elaborate.
- How do you make what's happening in this sector more interesting and intriguing to people like you? SHOW SAMPLE OF BANNERS. PROBE FOR:
  - Do you find this approach eye-catching, intriguing or interesting? Does it pique your interest? Why/how?
- Who in your view has the most credibility to speak about research, scientific progress and innovation in the agricultural and agri-food sector? Who would you find most interesting to listen to? What kind of credentials does this person(s) need to have? PROBE FOR:
  - Scientists/researchers
  - Agricultural producers/farmers
  - CEO's of food manufacturing/food processing companies
  - Media spokespeople
  - The Minister of AAFC or departmental spokesperson
  - Food experts (i.e., from the Food Network)

- Chefs
- Some combination?
- Anyone else? Think outside the box.

WRAP-UP (5 MINUTES) – 7:25/9:25

- We've worked through a lot of material tonight. Distilling it right down to the key topics or stories that you would like to hear more about from the Government of Canada, what would they be? What areas of innovation in this sector are you most interested in hearing more about? Is it important that the innovations you hear about are those that have an impact in your region? ROUND TABLE.

THANK PARTICIPANTS AND CONCLUDE DISCUSSION. (7:30/9:30)

GROUPES DE DISCUSSION SUR L'AGRICULTURE MODERNE D'AAC
Guide du modérateur
VERSION FINALE 2 – 3 DÉC. 2013

INTRODUCTION (10 MINUTES) – 17 h 30/19 h 30

- Le modérateur se présente et souhaite la bienvenue aux participants au groupe de discussion.
  - Comme nous l'avons mentionné lors du processus de recrutement, nous organisons des groupes de discussion pour le compte du gouvernement du Canada.
  - Avant de commencer, j'aimerais prendre quelques minutes pour vous expliquer comment un groupe de discussion fonctionne, pour les personnes qui n'en ont jamais fait l'expérience.

- La discussion durera environ deux heures. N'hésitez pas à quitter la salle, au besoin, pendant la séance.

- Points à expliquer :
  - Enregistrement audio/vidéo : La séance sera enregistrée sur bande audio et vidéo, ce qui nous permettra de vérifier l'exactitude de nos notes au moment de l'analyse, s'il y a lieu. Les enregistrements resteront en notre possession et ne seront pas transmis à qui que ce soit sans le consentement écrit de tous les participants. J'aimerais d'ailleurs confirmer que vous avez tous signé le formulaire de consentement qui nous autorise à filmer et à enregistrer la discussion?
  - Miroir d'observation : Il y a des observateurs derrière le miroir. Ce sont des représentants du gouvernement, ou des personnes qui travaillent de près ou de loin sur les sujets et les documents dont nous allons discuter ce soir.
  - Confidentialité : Tout ce que vous direz au cours de la discussion demeurera strictement confidentiel. Si nous rapportons des commentaires, ce sera de manière anonyme. Notre rapport résumera les résultats obtenus dans les groupes sans fournir de noms. Ces résultats seront compilés et présentés de façon globale plutôt que groupe par groupe. Vous pourrez consulter le rapport par l'entremise de la Bibliothèque du Parlement ou de Bibliothèque et Archives Canada. Venez me voir à la fin de la séance si vous souhaitez avoir plus de détails à ce sujet.

- Description du fonctionnement d'un groupe de discussion :
  - Les groupes de discussion visent à susciter une discussion ouverte et honnête. En tant que modérateur, mon rôle est de guider la discussion et d'encourager tout le monde à participer. Je dois aussi m'assurer que la discussion ne s'écarte pas du sujet et qu'elle respecte les délais prévus.
  - Votre rôle à vous est de répondre aux questions et de donner votre opinion. Toutes les opinions du groupe nous intéressent, qu'elles soient minoritaires ou majoritaires; il ne faut donc pas hésiter à vous exprimer même si vous croyez que le groupe aura un avis différent du vôtre. Peu importe que d'autres participants partagent ou non votre point de vue, votre opinion est importante et doit être respectée. Nous souhaitons entendre tout le monde s'exprimer.
  - J'aimerais également souligner qu'il n'y a pas de mauvaises réponses. Nous voulons simplement connaître votre opinion et comprendre votre attitude. Ce n'est pas un test de connaissances. Vous n'aviez pas à vous préparer en vue de cette rencontre.

- Veuillez noter que je ne suis pas à l'emploi du gouvernement du Canada et que je ne serai peut-être pas en mesure de répondre à certaines de vos questions au sujet du programme dont nous allons discuter. Si des questions importantes sont soulevées, nous tâcherons de vous donner les réponses avant la fin de la rencontre. **(NOTE AU MODÉRATEUR : INFORMER LES PARTICIPANTS À LA FIN DE LA RENCONTRE (SURTOUT S'IL Y A DES QUESTIONS) QU'ILS TROUVERONT UNE FOULE DE RÉPONSES AU www.agr.gc.ca, UN SITE WEB DU GOUVERNEMENT DU CANADA).**

- (Le modérateur se présente). Les participants doivent se présenter en donnant uniquement leur prénom. Je vous invite à dire quelques mots à votre sujet, à vous présenter en 30 secondes.

RÉCHAUFFEMENT (10 MINUTES) – 17 h 40/19 h 40

- Pour lancer la discussion, J'aimerais recueillir vos impressions sur certains aspects de l'économie. Nous allons procéder par étapes. Tout d'abord, prenez le stylo et la feuille qui sont devant vous, et tracez deux lignes verticales sur la page afin de créer trois colonnes. Nommez vos trois colonnes : PASSÉ, PRÉSENT ET FUTUR.
  - Dans la première colonne, notez les trois secteurs ou industries qui vous paraissent avoir été les plus importants pour l'économie canadienne dans le passé – il y a 20 ou 30 ans, disons. NOTE : EXPLIQUER CE QU'ON ENTEND PAR « SECTEUR » (P. EX. : IL NE S'AGIT PAS D'UN SECTEUR AU SENS LARGE, COMME LE SECTEUR MANUFACTURIER OU LE SECTEUR DES SERVICES; CE DOIT ÊTRE PLUS PRÉCIS).
  - Dans la deuxième colonne, notez les trois principaux secteurs ou industries qui vous paraissent faire une contribution importante à l'économie canadienne actuelle (à l'échelle nationale).
  - Finalement, dans la troisième colonne, notez les trois secteurs qui vous paraissent être les plus vitaux pour l'économie canadienne de l'avenir – disons, dans les 20 à 30 prochaines années. Quels secteurs ou industries seront les plus importants d'après vous? DISCUTER EN PLÉNIÈRE.
- Si je vous avais demandé de noter les trois principaux secteurs ou industries qui vous paraissent faire une contribution importante à l'économie de [**nom de la province**] à l'heure actuelle, est-ce que vous auriez noté les mêmes secteurs que dans votre deuxième colonne? DISCUTER.
- Lorsque vous déterminez quels secteurs ou industries font une contribution importante à notre économie, toutes époques confondues, sur quoi repose votre jugement? De quoi tenez-vous compte? Comment définissez-vous une « contribution importante » ? DEMANDER DES PRÉCISIONS :
    - Contribution au PIB, en pourcentage
    - Nombre d'emplois créés (directs ou indirects)
    - Taille du secteur (revenus)
    - Vitalité du secteur
    - Importance pour une société prospère ou saine
    - Volume des échanges commerciaux ou des exportations internationales
- Maintenant, je vais vous poser une question légèrement différente. Quand vous pensez à des industries ou des secteurs de l'économie qui sont « modernes » ou « novateurs », lesquels vous viennent à l'esprit en premier? FAIRE UNE LISTE DES RÉPONSES ET EN DISCUTER. DEMANDER DES PRÉCISIONS :
  - Qu'est-ce qui vous fait dire que cette industrie ou ce secteur sont modernes ou novateurs? Qu'est-ce qui se passe dans ce secteur? Qu'est-ce qui le rend moderne ou novateur, d'après vous?

IMPORTANCE DU SECTEUR DE L'AGRICULTURE ET DE L'AGROALIMENTAIRE ET IMPRESSIONS LE CONCERNANT (20 MINUTES) – 17 h 50/19 h 50

- SELON LES RÉPONSES DONNÉES AUX QUESTIONS PRÉCÉDENTES : Quelle place occupe le secteur agricole et agroalimentaire en termes de contribution à l'économie nationale/provinciale? Est-ce un secteur important? DEMANDER DES PRÉCISIONS :
  - Avez-vous l'impression que ce secteur connaît une croissance ou un déclin au Canada/dans votre province? Veuillez expliquer.
  - Selon vous, quelles sont les perspectives de ce secteur pour les 20 à 30 prochaines années? Veuillez expliquer.
- **EXERCICE INDIVIDUEL D'ASSOCIATION D'IMAGES :** Nous allons consacrer le reste de la séance au secteur agricole et agroalimentaire. J'aimerais prendre quelques minutes pour recueillir vos impressions sur ce secteur. Réfléchissez quelques instants et dites-moi quelles images surgissent dans votre esprit quand je parle de l'agriculture ou de l'agroalimentaire en tant qu'industrie ou en tant que secteur. Ne pensez pas à des mots, mais plutôt à des images et à des symboles… Quelle est l'image que vous voyez en pensée… l'image, ou les images, que vous associez le plus à ce secteur… Est-ce que tout le monde a une ou plusieurs images en tête? Faisons un tour de table pour que chaque personne puisse me décrire ce qu'elle voit. TOUR DE TABLE.

- Dans le même ordre d'idées, si vous deviez décrire ce secteur, quels mots utiliseriez-vous? Quels mots vous viennent à l'esprit quand vous pensez à l'agriculture et à l'agroalimentaire? DISCUSSION SPONTANÉE. OBTENIR DES MOTS ET LES NOTER SUR LE TABLEAU-PAPIER. DEMANDER DES PRÉCISIONS :
  - Gestion des approvisionnements – Connaissez-vous ce terme? Qu'est-ce qu'il veut dire? EXPLIQUER LE SENS, AU BESOIN. **[Au Canada, certaines industries du secteur agricole (p. ex. : l'industrie des œufs, du lait, du poulet et du dindon) exercent leurs activités dans le cadre de ce qu'on appelle un système de gestion des approvisionnements. Ce système est régi par une agence de commercialisation nationale ou provinciale qui impose aux producteurs des quotas sur le volume de denrées qu'ils peuvent commercialiser. L'objectif est de stabiliser le prix de vente du produit et d'éviter les fluctuations excessives du marché, afin d'assurer aux fermiers une certaine sécurité économique sans recourir à des subsides. Par ailleurs, en vertu du système de gestion des approvisionnements, des droits de douane sont appliqués afin de limiter le volume des importations au Canada de marchandises déjà produites au pays.]** De façon générale, est-ce un système avantageux ou désavantageux pour les producteurs? Et pour les consommateurs?
- **EXERCICE INDIVIDUEL :** Maintenant, j'aimerais vous distribuer un court exercice à faire individuellement. Comme vous le verrez, il s'agit d'évaluer le secteur selon une série d'aspects. EXPLIQUER L'EXERCICE ET DONNER AUX PARTICIPANTS 5 MINUTES ENVIRON POUR LE FAIRE. DISCUTER DES COTES ATTRIBUÉES À CHAQUE ASPECT. DEMANDER DES PRÉCISIONS :
  - Combien d'entre vous ont donné une cote de 8 à 10 pour [mentionner l'aspect]? De quoi avez-vous tenu compte en donnant cette cote?
  - Combien d'entre vous ont donné une cote de 5 ou moins pour [mentionner l'aspect]? De quoi avez-vous tenu compte en donnant cette cote?

CONNAISSANCE DU SECTEUR DE L'AGRICULTURE ET DE L'AGROALIMENTAIRE (25 MINUTES) – 18 h 10/20 h 10

- Avant d'explorer davantage vos impressions et votre point de vue sur ce secteur, j'aimerais savoir jusqu'à quel point c'est un secteur qui vous est familier. Est-ce que vous en savez beaucoup à son sujet? Diriez-vous que vous êtes très bien informés, assez bien informés, pas très informés ou pas du tout informés sur ce secteur? DEMANDER DES PRÉCISIONS :
  - Quels types d'interactions avez-vous avec ce secteur? (DEMANDER DES PRÉCISIONS : interactions à l'épicerie ou au marché seulement, par l'intermédiaire d'amis qui sont fermiers ou qui travaillent dans l'industrie?) Combien parmi vous ont déjà visité une ferme ou rendu visite à un producteur agricole? Combien ont visité un autre type d'installation agricole ou agroalimentaire?
  - Comment obtenez-vous de l'information sur ce secteur… sur ce qui se passe dans ce secteur au Canada/dans votre province? Habituellement, où vous procurez-vous de l'information? Quelles sources utilisez-vous? ÉNUMÉRER.
- **EXERCICE EN PLÉNIÈRE :** J'aimerais que nous prenions quelques moments pour nous donner une vue d'ensemble du secteur à l'aide d'un schéma, le délimiter, préciser ce qu'il englobe. Pourriez-vous me dire quels sont les éléments clés de ce secteur? DESSINER LE SCHÉMA À PARTIR DES INSTRUCTIONS DU GROUPE. LE LAISSER AFFICHÉ AU MUR JUSQU'À LA FIN DE LA SÉANCE. SELON CE QUE LE GROUPE INCLUT DANS LE SCHÉMA, DEMANDER DES PRÉCISIONS :
  - Où se situe chacun des éléments suivants dans ce schéma?
    - Les scientifiques, les chercheurs
    - Agriculture et Agroalimentaire Canada (quel est le rôle de ce ministère?)
    - Les transports
    - Le commerce, les exportations
    - Les grossistes
    - Les détaillants
    - Les intrants agricoles, par exemple le carburant, les engrais, etc.?
  - Quels sont les éléments du secteur auquel on pense moins, en général, ou qui ne nous viennent pas immédiatement à l'esprit?

- Savez-vous combien de Canadiens travaillent dans ce secteur? EXPLIQUER QUE 2,1 MILLIONS DE CANADIENS Y TRAVAILLENT (UN EMPLOI SUR HUIT). Est-ce que cela vous surprend?
- Et sur le plan des échanges commerciaux, le Canada est-il un grand exportateur de produits agricoles, selon vous? Quels sont certains des produits agricoles pour lesquels le Canada est connu à travers le monde? EXPLIQUER QUE LE CANADA ARRIVE AU 5^E RANG MONDIAL DES EXPORTATEURS AGRICOLES. Est-ce que cela vous surprend?

- Avez-vous entendu parler de ce secteur dans les médias récemment? Veuillez donner des détails. DEMANDER DES PRÉCISIONS :
  - Est-ce que certains d'entre vous ont entendu parler de l'Accord économique et commercial global (AECG) entre le Canada et l'Union européenne? Qu'est-ce que vous savez à ce sujet? Pensez-vous que cet accord est une bonne chose ou une mauvaise chose pour le Canada? Veuillez expliquer.
  - Quel impact cet accord a-t-il, ou va-t-il avoir, sur le secteur de l'agriculture et de l'agroalimentaire? En quoi va-t-il profiter à des Canadiens comme vous et moi? Veuillez expliquer. SI LE GROUPE SAIT PEU DE CHOSES AU SUJET DE L'AECG, DONNER L'EXPLICATION SUIVANTE :
    - **L'AECG EST UN ACCORD COMMERCIAL RÉCEMMENT SIGNÉ PAR LE CANADA ET L'UNION EUROPÉENNE. C'EST LE PREMIER ACCORD BILATÉRAL DE LIBRE-ÉCHANGE CONCLU ENTRE L'UNION EUROPÉENNE ET UN PAYS DU G8. IL S'AGIT D'UN ACCORD DE VASTE PORTÉE, QUI COUVRE TOUTES LES INDUSTRIES, DU SECTEUR DE L'AUTOMOBILE JUSQU'AUX DROITS DE DOUANE APPLICABLES AUX PRODUITS AGRICOLES ET AUX DROITS DE PROPRIÉTÉ INTELLECTUELLE. PAR EXEMPLE, L'ACCORD SUPPRIME 99 % DES DROITS DE DOUANE ENTRE LES DEUX ÉCONOMIES, CE QUI DEVRAIT PROFITER À L'AGRICULTURE CANADIENNE. TOUT COMME L'ACCORD DE LIBRE ÉCHANGE NORD-AMÉRICAIN (ALENA), L'AECG DONNERA AUX ENTREPRISES CANADIENNES UN BIEN MEILLEUR ACCÈS AUX MARCHÉS EUROPÉENS, ET RÉCIPROQUEMENT. [DONNER DES EXPLICATIONS SUR LE G8 ET L'ALENA, AU BESOIN.]**
  - Dans l'ensemble, qui profitera le plus de cet accord, selon vous : le Canada ou l'Union européenne? Pourquoi?
- Dans le premier exercice, on vous a demandé d'évaluer le secteur agricole et agroalimentaire canadien sur le plan de la modernité et de l'innovation. Si je dessine une ligne horizontale sur le tableau-papier et que ses deux pôles sont : « ***une industrie du XX^e siècle, qui n'a pas beaucoup changé au cours des 20 à 25 dernières années »*** et « ***une industrie du XXI^e siècle, qui est axée sur le progrès et qui évolue considérablement »***, où est-ce que vous situeriez l'agriculture et l'agroalimentaire sur cette ligne? DESSINER LA LIGNE HORIZONTALE SUR LE TABLEAU-PAPIER EN INSCRIVANT LES DEUX PÔLES INDIQUÉS. Qu'est-ce qui vous fait dire ça? DEMANDER DES PRÉCISIONS :
  - Qu'est-ce qui vous inciterait à placer ce secteur un peu plus à droite sur la ligne (c.-à-d. à le considérer comme plus moderne, novateur, axé sur le progrès)? Quels types de changements doivent s'y produire, comment doit-il s'adapter, en quoi serait-il différent?
  - Quelles seraient les caractéristiques d'un secteur agricole et agroalimentaire moderne et axé sur le progrès?
- Est-ce que vous pensez que la science, la recherche et l'innovation sont une caractéristique importante de ce secteur? Pourquoi/pourquoi pas? DEMANDER DES PRÉCISIONS :
  - Dans quelle mesure pensez-vous que la recherche, la science, l'innovation et la technologie jouent un rôle dans le secteur agricole et agroalimentaire?
  - Lorsqu'on mentionne l'innovation et la technologie en lien avec l'agriculture, votre première réaction est-elle négative ou positive? Veuillez donner des détails.
  - Avez-vous l'impression de bien comprendre en quoi la science et l'innovation contribuent à notre secteur agricole et agroalimentaire et à son évolution? Veuillez expliquer. DEMANDER DES PRÉCISIONS :
    - Pourquoi serait-il important que le secteur canadien de l'agriculture et de l'agroalimentaire continue d'innover au cours des prochaines décennies? Quels sont, d'après vous, certains des défis que le secteur devra relever dans l'avenir? En quoi la recherche, la science et l'innovation peuvent-elles aider à relever ces défis? À votre avis, qu'est-ce qui milite le plus en faveur de l'innovation et de la transformation du secteur? DEMANDER DES PRÉCISIONS :
      - La nécessité d'une rentabilité accrue – comment devrions-nous réagir?

        - La nécessité d'une compétitivité accrue par rapport aux producteurs d'aliments à bas prix dans les marchés émergents – comment devrions-nous réagir?
        - L'évolution des préférences des consommateurs – comment devrions-nous réagir?
        - La durabilité ou la gérance de l'environnement et des ressources – comment devrions-nous réagir?
        - La possibilité de cultiver des aliments dans des conditions climatiques diverses
    - Sur quels plans ce secteur est-il moderne? Avez-vous des exemples de l'impact que la recherche, la science et l'innovation ont eu sur ce secteur? Pouvez-vous donner des exemples d'innovations relativement récentes qui se sont produites dans ce secteur (disons, dans les 50 dernières années environ)? En quoi la recherche et développement (R. et D.) a-t-elle contribué à des améliorations dans le secteur? DEMANDER DES PRÉCISIONS :
        - Quelles parties du secteur ont fait l'objet d'innovations importantes? Si nous revenons au schéma que nous avons dessiné plus tôt, pouvez-vous me donner des exemples d'innovations qui ont eu lieu dans chaque partie du secteur?
    - Y a-t-il des innovations dont vous et d'autres consommateurs avez profité personnellement? FAIRE LA LISTE. DEMANDER DES PRÉCISIONS :
        - Techniques agricoles résistantes à la sécheresse
        - Rendement accru des cultures (cycles de croissance plus rapides pour certaines cultures, mise au point de biopesticides, etc.)
        - Production d'aliments qui offrent plus d'avantages nutritionnels
        - Pratiques agricoles sans danger pour l'environnement
    - Quel est le plus grand joueur dans le domaine de la recherche agricole canadienne? DEMANDER DES PRÉCISIONS :
        - Comment envisagez-vous le rôle d'AAC en matière de recherche? Que fait le ministère sur ce plan, ou que devrait-il faire?
        - Est-ce que les systèmes de gestion des approvisionnements, comme ceux dont nous avons parlé plus tôt, ont leur place dans un système agricole et agroalimentaire moderne, axé sur le progrès? Pourquoi/pourquoi pas? Veuillez donner des détails.

RACONTER L'HISTOIRE DE L'AGRICULTURE ET DE L'AGROALIMENTAIRE (30 MINUTES) – 18 h 35/20 h 35

- **EXERCICE EN PLÉNIÈRE** : Pour conclure cette section, nous allons essayer de créer une petite histoire sur le secteur canadien de l'agriculture et de l'agroalimentaire. Imaginez qu'on nous demande de mettre au point un outil d'information qui expliquera au public de quelle façon ce secteur se modernise, comment il a évolué et continue d'évoluer. Votre objectif est de faire voir, de faire sentir et de faire comprendre aux gens que ce secteur est important et qu'il est axé sur le progrès. Avant de créer l'histoire en tant que telle, vous devez cerner le concept. Je vais vous distribuer quelques pages qui contiennent des instructions et des documents que vous pourrez consulter, au besoin, pour élaborer votre concept. Il faut refléchir à la manière dont nous voulons raconter cette histoire, en sachant que nous avons carte blanche sur le plan créatif. Voici donc les éléments auxquels vous devez réfléchir. DISTRIBUER LES TROUSSES ET INSCRIRE LES MOTS EN CARACTÈRES GRAS CI-DESSOUS SUR LE TABLEAU-PAPIER EN GUISE DE RAPPEL :
    - Tout d'abord, nous voulons nous assurer de capter l'attention du public, de rendre l'histoire intéressante et pertinente. Essayez de voir comment vous vous y prendriez. Quel est le meilleur moyen d'interpeller les gens?
    - Toute histoire comporte certains éléments :
        - **Une phrase, une image ou une scène d'ouverture accrocheuse** … qui va immédiatement attirer l'attention de l'auditoire et lui donner envie d'écouter la suite.
        - Un protagoniste, un narrateur ou un autre élément central… Vous devez déterminer **ce qui sera au cœur de votre histoire (personnes, choses)**. Selon quel point de vue voulez-vous raconter l'histoire?
        - L'information que vous voulez inclure : par exemple, des faits, des chiffres, certains sujets, de l'information générale. Quel est le centre d'intérêt de l'histoire? **Quels types de sujets allez-**

vous aborder? Quels sont vos messages clés? Comment progresse l'histoire, de façon générale? (Si vous n'avez pas tous les faits en main, notez simplement les faits que vous voudriez couvrir. Par exemple, les sujet dont vous aimeriez entendre parler davantage)

    - Maintenant, **comment allez-vous raconter l'histoire**… **quel sera son support**? Ce n'est pas obligé d'être un livret, bien que ce soit une possibilité. Quels sont d'autres supports envisageables? Vous pourriez opter pour une vidéo, un dessin animé, un roman en images, un documentaire… À vous de décider!
    - Ensuite, vous devez choisir **un ton et un style**… déterminer la manière dont vous voulez présenter votre histoire. Est-ce qu'elle devrait être humoristique, sérieuse, pleine de suspense… Comment voulez-vous procéder?
    - Finalement, quelles **photos ou images** voulez-vous utiliser pour accompagner ou illustrer votre histoire?
  - Nous allons commencer. Le but n'est pas de formuler une histoire complète, mais je voudrais que nous passions en revue tous les éléments de notre plan. (DÉTOURNER LES PARTICIPANTS D'ENJEUX TELS QUE LES ALIMENTS GÉNÉTIQUEMENT MODIFIÉS ET LA SALUBRITÉ DES ALIMENTS – CES ENJEUX SONT DU RESSORT DE SANTÉ CANADA ET DE L'AGENCE CANADIENNE D'INSPECTION DES ALIMENTS. CEPENDANT, LES OGM PEUVENT ÊTRE CITÉS À TITRE D'ÉLÉMENTS POSITIFS DANS UN SECTEUR AGRICOLE MODERNE ET NOVATEUR.)
- DEMANDER DES PRÉCISIONS :
  - En créant ces histoires, comment peut-on le mieux faire ressortir l'importance de l'agriculture et de l'agroalimentaire pour l'économie canadienne? Quelles sont les approches possibles? Comment peut-on rendre ce secteur plus pertinent pour des gens comme vous?
  - Est-ce que le fermier joue un rôle central dans la narration de l'histoire?
  - Est-ce que le gouvernement a sa place dans l'histoire? Est-ce que le rôle du gouvernement intéresse quelqu'un? Quel rôle particulier le gouvernement joue-t-il dans la transformation du secteur? Quel est le meilleur moyen d'intégrer cet élément d'information? Comment devrions-nous présenter le rôle du gouvernement fédéral? D'après vous, sur quels points en particulier est-ce que le public devrait être mieux informé du rôle joué par le gouvernement?
  - Quels sont les enjeux ou les sujets qui nous intéressent le plus en lien avec ce secteur? Nous pourrions allonger la liste. En ce qui concerne la modernisation et la transformation du secteur, quels sont les cinq principaux enjeux ou sujets sur lesquels vous aimeriez être mieux renseignés? Et à votre avis, quels sujets sont les plus susceptibles d'intéresser le public?
- DISTRIBUER LA BROCHURE « *UNE CULTURE EN PLEINE CROISSANCE* ». Il s'agit d'une courte brochure publiée par AAC qui raconte l'histoire du secteur. Prenez quelques instants pour la feuilleter. Comment se compare-t-elle au concept que nous avons créé? DEMANDER DES PRÉCISIONS :
  - Est-ce que c'est la bonne approche?
  - Est-ce que les éléments d'information présentés dans la brochure aident à raconter l'histoire de la modernisation? Est-ce qu'il manque quelque chose?
  - Quelle partie de la brochure vous a le plus intéressés? DEMANDER DES PRÉCISIONS :
    - Est-ce que les histoires sur les haricots, les probiotiques et les abeilles vous intéressent? Veuillez expliquer.
- DISTRIBUER LA BROCHURE « *DES INNOVATIONS À DÉCOUVRIR*». DEMANDER DES PRÉCISIONS :
  - Est-ce que c'est la bonne approche?
  - Est-ce que les éléments d'information présentés dans la brochure aident à raconter l'histoire de la modernisation? Est-ce qu'il manque quelque chose?
  - Quelle partie de la brochure vous a le plus intéressés? DEMANDER DES PRÉCISIONS :

L'INNOVATION AGRICOLE – DIFFUSER LE MESSAGE/L'HISTOIRE (20 MINUTES) – 19 h 05/21 h 05

- J'aimerais vous montrer une vidéo de quatre minutes qui porte sur l'innovation dans le secteur agricole. FAIRE JOUER LA VIDÉO INTITULÉE « *UNE CULTURE D'INNOVATION* ». Quelle est votre réaction générale à cette vidéo? DEMANDER DES PRÉCISIONS :
    - Est-ce qu'elle vous a plu/déplu?
    - L'avez-vous trouvée instructive/pas instructive?
    - Est-ce un bon outil d'information?
    - Y a-t-il quelque chose qui vous a surpris? Veuillez expliquer. Quelle information avez-vous trouvée la plus étonnante… un fait que vous ignoriez et que vous avez appris en regardant cette vidéo?
    - Est-ce que la vidéo vous donne envie d'en apprendre davantage sur le secteur? Sur quoi précisément aimeriez-vous en apprendre davantage?
- Maintenant, si vous pensez au support qu'est la vidéo, comment se compare-t-il à d'autres supports pour ce qui est de diffuser de l'information au grand public? Quels sont les meilleurs moyens de communiquer des histoires sur le thème de l'innovation dans le secteur agricole et de vous aider à mieux comprendre ce qui s'y passe? CRÉER UNE LISTE. DEMANDER DES PRÉCISIONS SUR LA RÉACTION DES PARTICIPANTS À CES SUPPORTS :
    - Brochures, imprimés publicitaires envoyés par la poste
    - Applications mobiles
    - Fil Twitter
    - Facebook : quel type de contenu serait-il pertinent de partager sur Facebook ou par courriel? Autre chose?
    - *Push e-mails*
    - Site Web par abonnement (par l'intermédiaire du site Web d'AAC)
    - YouTube : seriez-vous intéressés à vous abonner à une chaîne YouTube qui présenterait les avancées dans ce secteur?
    - Journées agricoles portes ouvertes (dans les fermes) : que pensez-vous de cette idée? Seriez-vous intéressés à participer à cette activité?
    - Épiceries : quel type de présence?
    - Marchés : quel type de présence?
    - Kiosques : où devrait-on les installer?
    - Expositions spéciales dans les musées (p. ex., musées des sciences ou de la technologie)
- Revenons aux concepts que vous avez élaborés… Réfléchissons un peu plus à ce qui permettrait le mieux d'attirer l'attention des gens sur le sujet? Est-ce un sujet qui vous paraît intéressant ou ennuyant? Donnez des détails.
- Comment peut-on rendre plus intéressants ou captivants les nouveaux développements qui ont lieu dans ce secteur pour des gens comme vous? MONTRER DES EXEMPLES DE BANNIÈRES. DEMANDER DES PRÉCISIONS :
    - Trouvez-vous cette approche accrocheuse, captivante ou intéressante? Est-ce qu'elle pique votre curiosité? Pourquoi/comment?
- Selon vous, qui a le plus de crédibilité pour parler de recherche, de progrès scientifique et d'innovation dans le secteur agricole et agroalimentaire? Qui vous semblerait le plus intéressant à écouter? Quels titres de compétences cette ou ces personnes doivent-elles détenir? DEMANDER DES PRÉCISIONS :
    - Scientifiques ou chercheurs
    - Producteurs agricoles ou fermiers
    - PDG d'entreprises de fabrication ou de transformation des aliments
    - Porte-parole auprès des médias
    - Ministre d'AAC et porte-parole ministériel
    - Experts en alimentation (p. ex., du Food Network)
    - Chefs
    - Plusieurs de ces personnes?
    - Quelqu'un d'autre? Donnez libre cours à votre imagination.

RÉCAPITULATION (5 MINUTES) – 19 h 25/21 h 25

- Nous avons examiné une foule de questions ce soir. Pour revenir à l'essentiel, quels sont les principaux sujets dont le gouvernement du Canada devrait parler davantage? Quels types d'innovations dans le secteur agricole et agroalimentaire suscitent le plus d'intérêt pour vous? Est-il important que les innovations présentées soient celles qui ont un impact dans votre région? TOUR DE TABLE.

REMERCIER LES PARTICIPANTS ET CLORE LA DISCUSSION. (19 h 30/21 h 30)

Appendix C: Participant Exercise

Participant Exercise

Assignment #1 – AAFC Focus Groups **Group 1 / 2 / 3 / 4 TORONTO**

When you think about Canada's agricultural and agri-food sector, please circle the point on the scale that best reflects where you feel it is situated in terms of each of the following descriptions.

1 A sector that is not very successful	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 A highly successful sector**

1 A very inefficient system	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 A very efficient system**

1 Not sufficiently regulated	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Sufficiently regulated**

1 A system of businesses that is not integrated	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 A well integrated system of businesses**

1 A sector that does not promote innovation	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 A sector that promotes innovation**

1 A sector that is not very environmentally conscious	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 A sector that is very environmentally conscious**

1 One of Canada's least modern industries	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 One of Canada's most modern industries**

Exercice n° 1 – Groupes de discussion d'AAC **Groupes 1 / 2 MONTRÉAL/MONTMAGNY**

Veuillez encercler sur l'échelle d'évaluation la cote qui vous semble le mieux refléter où se situe le secteur canadien de l'agriculture et de l'agroalimentaire par rapport à chacune des descriptions qui suivent.

1 Un secteur peu performant	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Un secteur très performant**

1 Un système très inefficace	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Un système très efficace**

1 Un secteur insuffisamment réglementé	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Un secteur suffisamment réglementé**

1 Un système d'entreprises qui n'est pas intégré	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Un système d'entreprises qui est bien intégré**

1 Un secteur qui n'encourage pas l'innovation	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Un secteur qui encourage l'innovation**

1 Un secteur peu sensibilisé à l'environnement	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Un secteur très sensibilisé à l'environnement**

1 L'une des industries les moins modernes du Canada	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 L'une des industries les plus modernes du Canada**