Canadian Food Inspection Agency Agence canadienne d'inspection des aliments

Public opinion research with food businesses to support compliance with food safety regulations: 2020-2021

Canadian Food Inspection Agency

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For more information, please contact the Canadian Food Inspection Agency at:
cfia.enquiriesarchive-archivedemandederenseignements.acia@inspection.gc.ca

Ce rapport est aussi disponible en français.

Canada

Public opinion research with food businesses to support compliance with food safety regulations: 2020-2021
Final Report
Prepared for the Canadian Food Inspection Agency
Supplier name: Quorus Consulting Group Inc.
March 2021

This public opinion research report presents the results of a telephone survey conducted by Quorus Consulting Group Inc. on behalf of the Canadian Food Inspection Agency, with 1,081 businesses in Canada during January and February 2021.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique auprès des entreprises alimentaires à l'appui de la conformité à la réglementation sur la salubrité des aliments : 2020-2021.

Canadian Food Inspection Agency
1400 Merivale Road
Ottawa, Ontario
K1A 0Y9

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Table of Contents

Executive summary

Background and research objectives

Since publishing the *Safe Food for Canadians Regulations* (SFCR) in Canada Gazette in June 2018, the Canadian Food Inspection Agency (CFIA) has been implementing a phased-in approach for some elements of the regulations. January 2020 marked the beginning of a new phase, implementing regulations for Fresh Fruit or Vegetables businesses. Additionally, July 2020 marked another milestone, in which the regulations were extended to businesses in the Manufactured Foods Sector (MFS), which were not previously federally registered. Given the enforcement of COVID-19 related restrictions, resource limitations for small and micro businesses were a key focus.

The CFIA requested public opinion research to understand the Canadian food industry's views on food safety and food safety regulations, and the impact of the COVID-19 pandemic on the food industry, as well as the growth of e-commerce. This research helped inform the effective implementation, communications and compliance with the SFCR. Specific objectives included gaining a better understanding of industry's awareness, motivations, perceptions and attitudes towards:

- the various roles and responsibilities within the food safety system
- federal food regulations as they apply to online sales
- resource needs and barriers to complying with regulatory requirements, to identify root causes of non-compliance and support compliance promotion communications
- current services, and expectations on future services and programs

The research also gathered feedback on:

- regulatory challenges food businesses faced during COVID-19
- compliance promotion tools and communications products
- the effectiveness of SFCR communications

Methodology

National telephone survey

The research consisted of a national telephone survey with businesses in the food industry in Canada based on a selected list of North American Industry Classification System (NAICS) codes provided by the CFIA. The data was weighted according to the population counts per industry vertical and province as per InfoCanada information. All research was conducted in accordance with the professional standards established by the Government of Canada Public Opinion Research Standards.

Data collection occurred between January 28th and February 25th, 2021. A total of 1,081 businesses participated in the study, with an average completion length of 23 minutes and a response rate of 10% across the sample. For this study, a quota for "Retail Only" businesses was established to minimize the dominance of this segment in the overall sample. Data was monitored to also ensure that multiple locations from the same franchises were not overrepresented in the sample.

The margin of error of this sample size is +/- 3.0%, 19 times out of 20. The research findings can be extrapolated to the broader audience considering the margin of error associated with this sample size. The margins of error for the results in this study will vary based on a variety of factors. For instance, results for sub-groups with smaller sample sizes will have a higher margin of error.

Focus groups and interviews

The research methodology consisted of 6 online focus groups and 10 online in-depth interviews, with participants in Atlantic Canada, Ontario (both within and outside of the GTA), Quebec, the Prairies and British Columbia. Data collection consisted of online focus groups, each lasting no more than 1.5 hours, and online 1-on-1 in-depth interviews, each lasting no more than 45 minutes.

Participants invited to participate in the focus groups and in-depth interviews were recruited through a combination of random contacts by telephone and through the telephone survey that was conducted as part of this study. For each focus group, Quorus recruited 8 participants to achieve 6-8 participants per focus group. Recruited participants were offered an honorarium of $150 for focus group participants and $100 for online in-depth interview participants.

Participants represented a good mix of types of business (for example importers, exporters, manufacturers, retailers), size of business (micro, small, medium and large food businesses) and location.

The recruitment of focus group and in-depth interview participants followed the screening, recruiting and privacy considerations as set out in the Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research.

Food safety activities

In 2021, 74% of businesses very clearly understood the food safety regulations that apply to their foods (provided a rating of 6 or 7 in a 7-point scale to rate understanding). Most of the remaining businesses (20%) gave a rating of 4 or 5, “somewhat clearly” understanding the food regulations.

Qualitative research showed the understanding of the regulations varied depending on the size of the business, mostly because larger businesses have dedicated, and/or more staff assigned to review and coordinate the compliance of the regulations. Therefore, representatives from large businesses felt it was easy to stay on top of changes to regulations.

Participants involved in understanding the food regulations for their business agreed that reading these regulations involves a lot of time, but that, by and large, the regulations are usually easy to understand. There is a sense that the new regulations are quite broad and that they can be subject to interpretation, something many participants did not feel comfortable doing on their own

Participants from small food businesses tended to find it more challenging to stay on top of changes in the regulations, and understanding them as well, mainly because they have just a few people dedicated to playing many roles within the company.

Respondents were presented with a list of various food safety-related measures and were asked to note the ones that applied to their company. The most popular food safety activities included establishing a traceability program (77%), an internal training program on food safety (70%), followed by regularly sending staff on food safety training (52%).

Food safety activities that do not apply to retail-only businesses were presented only to businesses not exclusively in retail. The most popular of these food safety activities among these businesses included having written or documented operating procedures on food safety (76%) and having preventive controls in place in a written plan (66%).

Qualitative research confirmed that the use of technology has been a key factor in the success of complying with the SFCR, especially to trace food, but also to stay on top of regulation changes and updates, and to process new licences. Just being at ease with the use of the Internet seemed to be critical and especially a challenge for older respondents.

Regardless of their participation in a private certification scheme[1], respondents were asked to indicate whether they support the role of private certification schemes in achieving compliance with food safety regulations. More than 4 in 5 respondents (83%) supported the role of private certification schemes, an increase from results observed in 2020 (79%).

Businesses that use a certification system, are part of a quality program, or have hired a consultant had a smooth compliance experience when the SFCR was introduced and came into effect. Certifications and programs mentioned include Global Food Safety Initiative (GFSI), Safe Quality Food (SQF) and the CanadaGAP Program. These certifications are seen as rigorous quality processes at least on par with the regulations required by the CFIA, and therefore participants are confident they comply with the SFCR as well.

Awareness of the CFIA and the *Safe Food for Canadians Regulations* (SFCR)

Nearly 9 in 10 businesses were at least somewhat familiar with the CFIA (89%). More specifically, 57% rated their level of familiarity either a 6 or a 7 on a 7-point scale (where 1

[1] Private certification schemes are voluntary systems that set process and product requirements as well as the means of demonstrating conformity with these requirements.

meant not at all familiar and 7 meant very familiar). Another 32% considered themselves somewhat familiar (a rating of 4 or 5).

In 2021 and 2020, all businesses surveyed were asked specifically if they had heard, seen or read something about the *Safe Food for Canadians Regulations* (SFCR). 7 in 10 (70%) respondents were aware of the SFCR, up from 66% observed in 2020.

During the qualitative sessions, awareness of the SFCR was clearly different between large and small businesses. All large businesses were aware and familiar with the SFCR, and therefore the CFIA. Participants from large businesses heard about the SFCR years ago, when it was announced it would take place in 2019 or even earlier. However, awareness of the SFCR among small businesses was lower and dependent on the type of food products they managed or their type of business. For example, several participating small businesses explained they did not have products regulated by the CFIA (or at least they did not think they did), and therefore were not aware of the SFCR, and some were not very familiar with the CFIA.

Among businesses aware of the SFCR, the most common sources of information about the regulations were colleagues and industry events (33%), or the CFIA specifically (28%), followed by general, unspecified online sources (21%), and general government sources (16%).

Businesses that have third-party auditors or consultants (primarily large businesses) rely on these as their source for information on changes or updates to the regulations.

The experience from small businesses was quite different. Most have heard just recently, while others have not heard about SFCR at all. In addition, participants from small food businesses expressed they do not always know how to find out if there have been changes to the regulations or not, other than regularly checking the CFIA website.

Irrespective of whether they had seen, read or heard anything about the new regulations, businesses were asked if they thought the new regulations would apply to their business. Over 7 in 10 (71%) businesses believed the new regulations apply to their business, up from 64% in 2020.

Irrespective of the size of the businesses, participants considered the new regulations to be broader or less specific than previous regulations. A few felt that even when they contacted the CFIA for clarification, the agency did not give specific guidance or regulation interpretation specific to the business, but rather provided more general information which could be frustrating for businesses looking for specificities.

When specifically asked about the three key elements of the SFCR, results reveal that 82% of businesses were aware that the new regulations required most businesses to have product traceability processes. Awareness decreases to 71% for the written preventive control plan and to 66% for the licence.

Awareness of new SFCR requirements among specific sectors

Among businesses that grow fruit, vegetables or grains, more than half (57%) were aware of the new SFCR requirements introduced for the Fresh Fruit and Vegetable sector on January 15th, 2020.

Among processing or manufacturing businesses whose main product includes confectionary items or processed grain-based foods, nearly two thirds (63%) were aware of the new requirements as of July 15th, 2020.

Confidence in meeting regulations and impressions of the CFIA

Over 8 in 10 businesses (81%) had a traceability process in place that allows them to trace back their food to the company that supplied it.

Businesses not exclusively in retail were asked which of the three SFCR key elements would be the biggest challenge for food businesses. Results were somewhat evenly split, as 29% selected written preventive controls as the biggest food safety challenge, followed by traceability of food products (25%), and 21% selected licensing. In 2021, 25% of respondents indicated none of the key elements would be a challenge for food businesses.

Qualitative research revealed that in terms of the three main elements of the SFCR, licensing was the most well-known process among businesses. The process of renewing a licence was usually seen as easy and clear. Nearly all participants used the My CFIA portal for their licence renewals. As for Preventive Control Plans (PCPs), small food businesses were less aware of this requirement, but those who were aware tended to already have a plan in place. In terms of traceability, one of the more notable challenges for larger businesses was in having small suppliers who were not SFCR compliant, since this could affect their own ability to comply as well.

Another challenging aspect of SFCR, especially for smaller businesses, was the labeling of food products. Many mentioned different labelling issues based on changes to the regulations. There was a lot of confusion as to how these rules have changed and how to apply them.

Roughly 4 in 5 businesses (79%) felt very confident (gave a rating of 6 or 7 on a 7-point confidence scale) that they would meet food safety regulations and requirements if they were to be inspected. As the number of new regulations and requirements increased from previous waves, businesses feeling “very confident” have dropped from 92% in 2019 to the current 79%.

The majority of those who were very confident that they would meet regulations and requirements if they were inspected today attribute this confidence to the fact that they believe they follow the rules and /or comply with regulations (56%). Another 23% were confident because they are inspected regularly / have received positive feedback.

Among those who provided lower confidence ratings (somewhat or not very confident), 29% felt that there is always room for improvement, 28% felt they follow the rules, and 27% were not familiar with all of the current regulations or requirements.

Respondents were asked to specify their level of awareness of the CFIA's establishment-based risk assessment (ERA) on a scale of 1 to 7, where 1 meant nothing at all and 7 meant a great deal. Nearly 1 in 5 businesses (18%) had read or heard a great deal (scores of 6 or 7), while 29% were somewhat aware (scores of 4 or 5).

Roughly half of businesses strongly agreed that the CFIA is fair when inspecting food businesses (52%), that inspections are conducted in a consistent manner (48%) and that inspections follow rigorous logic (47%).

Agreement drops slightly when assessing if information from the CFIA arrives in a timely manner (44%) and that it is easy to understand the guidance provided by the CFIA (40%). Over 1 in 10 respondents agreed that the CFIA is not responsive when asked regulatory questions (15%), and that regulatory guidance is inconsistent (14%).

When asked about their perception of the CFIA during the qualitative sessions, most large businesses said they see the CFIA as the agency that ensures the food produced in Canada is of excellent quality and safe for consumption. They felt the CFIA was doing a very good job at ensuring safe food is produced and available in Canada, and that the inspections were done as regularly as they should be, according to the nature and risk-level of their business. The regulatory guidance provided by the CFIA was also perceived of good value, especially if they had a contact already within the CFIA that could be contacted right away or who could point them in the right direction to get the information needed.

On the other hand, many small businesses perceived the CFIA simply as a regulator and wished they could get more support from the CFIA to be able to comply with the regulations.

Another issue pertained to inspectors. While larger businesses seemed to have the same inspector or team of inspectors in regular contact and doing frequent visits to their business, small businesses expressed they had a different inspector every time the CFIA visited their business. Participants from small businesses noticed some inspectors performed their inspection with the lens of a large business operation, and therefore the interpretation of regulations did not apply.

Many participants highlighted the importance of improving the communication and relationship with inspectors and with the CFIA in general. Overall, participants would like to see the role of the CFIA to be more of a partner or mentor, rather than an external auditor, to be able to work together towards the same goal of food safety. This sentiment was more prominent among small businesses; however, a few large businesses shared this opinion as well.

Impact of COVID-19 pandemic

Canadian food businesses were asked to gauge the impact of the COVID-19 pandemic on a variety of points of interest, including the ability to meet food safety regulations and the effects on business operations.

Nearly a quarter of respondents (23%) described a positive or mostly positive impact on business operations, while 48% felt that business operations were negatively impacted, and 29% felt that their business was operating as usual with no effect.

When businesses were asked about the impact the COVID-19 pandemic had on their business' ability to comply with food regulations, unanimously businesses confirmed there was very little impact. There was some impact seen on general operations given the explicit request to respect public health guidelines. The impact of the pandemic for food businesses was more likely to be seen on revenues. A few businesses mentioned having a reduced client base given that they sold food products to restaurants, and many of these had to shut down for a period of time. Another example of an impact on revenue was the cases where businesses had to close their plant due to a COVID-19 outbreak, or because their business was considered non-essential.

Roughly 1 in 5 (18%) of businesses were forced to close at least a few days, while 82% did not have to shut down for any period of time throughout the pandemic.

Among businesses that closed for any period of time during the COVID-19 pandemic, 38% closed for a few months, 35% closed for a few weeks, and 12% for a few days. 1 in 10 businesses (10%) that closed during the pandemic remain closed but plan to reopen, while an additional 5% were not certain if or when they will be able to reopen.

Among businesses that were forced to close but have since reopened amidst the pandemic, more than half (54%) have reopened with reduced hours of operation compared to the hours worked before March of 2020, 40% have reopened with the same hours of operation, while 6% were operating with longer hours than before the pandemic.

When asked to specify the reason business operations were halted, nearly one third of these businesses (32%) did so to be able to put in place safety precautions, while 29% closed as they were considered non-essential. A reduction in sales forced 27% of businesses to shut down, while 15% chose to shut down in order to protect both staff and the general public.

Roughly half of businesses (53%) reported experiencing moderate changes to business operations surrounding the COVID-19 pandemic, while 26% described large changes.

Respondents were asked to rate a series of statements surrounding their ability to meet food safety regulations during the COVID-19 pandemic, using a scale of 1 to 7, where 1 meant “do not agree at all” and 7 meant “strongly agree”. Over one third (35%) strongly agreed (scores of 6 or 7) that the CFIA provided clear guidance for rules and regulations, and 34% strongly agreed the CFIA has been flexible in the enforcement of regulations during COVID-19. 1 in 5 respondents (20%) strongly agree that they were struggling to adapt to safety practices due to the pandemic, and 12% strongly agreed that COVID-19 has made it difficult for them to comply with food safety regulations.

Contact with the CFIA

Based on results from 2021, 70% of businesses have had some sort of contact with the CFIA over the past 12 months. The most common interaction with the CFIA over the past 12 months had been to look for information about food safety regulations or requirements on the CFIA’s website (47%). The next most common was requesting a permission, licence registration or certificate (30%), followed by having been inspected (28%), and contacting the CFIA for information on (rather than requesting) a permission, licence or certificate (26%).

Businesses having contacted the CFIA over the past 12 months most often did so through the CFIA website (57%), by contacting the CFIA by email (40%), or by phone (38%). A smaller proportion contacted the CFIA in person (7%), much lower than in recent years, likely due to the constraints of the pandemic. The proportion of those using email has overtaken contact over the phone.

Nearly 3 in 5 respondents (59%) were very satisfied with the overall service received from the CFIA in the past 12 months.

The responsiveness of service, quality of customer service, and high quality of information provided by the CFIA all seem to be key satisfaction drivers. Among those “very satisfied”, 35% provided this rating because the service was seen as responsive, another 35% felt the CFIA was helpful and provides good customer service, and 32% because of the high-quality information the CFIA provided. In addition, 22% of these respondents have had no problems or issues with the CFIA’s service that would otherwise lead them to provide a lower rating.

Those who were the least satisfied especially argue for more information from the CFIA, better customer service, and that it was difficult to keep up with regulations and processes.

Large businesses were more confident in contacting the CFIA, especially because many knew a specific person to contact, or knew how they would be reconnected to the right person. Small businesses on the other hand, tended to not proactively communicate with the CFIA – those who did had to try to find a person to talk to at the CFIA, often unsuccessfully, as the general line did not always have the answer to their questions

A few respondents mentioned receiving e-newsletters from the CFIA. Large businesses seemed more aware of the CFIA e-newsletters. Several participants across the groups would like targeted e-newsletters with information related to their food category(ies) specifically.

My CFIA

The survey also examined awareness and likelihood to use the digital service developed for convenient service delivery, My CFIA. Based on the most recent wave of surveys, nearly 2 in 5 businesses (39%) were aware of the My CFIA portal, with 27% of all responding businesses having used it.

Among the 27% of businesses that had used My CFIA, 70% did so to request a new licence, 55% to renew their licence, 44% to register their business, 32% to obtain a permit, and 23% to obtain an export certificate.

Overall, satisfaction with the portal was positive, as half of users (50%) gave a satisfaction rating of 6 or 7 (on a 7-point scale), and 36% a rating of 4 or 5. Across recent waves, this year's results showed the highest proportion of businesses "very satisfied", likely due to the higher number of respondents who had enrolled and had the opportunity to experience available services.

According to participants who provided a lower satisfaction score for My CFIA (136 businesses in total gave a satisfaction rating from 1 to 5) the most common reason was that the design was not user-friendly (64%). Other reasons provided included that the information was unclear (16%), and that the application process was difficult (13%). Survey participants who provided a higher satisfaction score (134 businesses in total gave a satisfaction rating of 6 or 7), appreciated the user-friendly design (44%), described it as straightforward (23%), found accurate information or the information they needed (18%), and found the platform accessible and with a responsive service (13%).

Businesses that have not used My CFIA were asked to specify which licences or permissions their company had with the CFIA. Over a quarter of businesses (27%) had a Safe Food for Canadians Licence, 17% had another type of licence or certificate, and 11% had a food export certificate. Nearly 3 in 5 respondents who have not used My CFIA (59%) were not sure of which licences or permissions their business had from the CFIA.

Awareness of the My CFIA portal was high among all participants. The portal was well evaluated by participants. Most remember using it, mainly to process new licences, and found this tool made licence renewals easy and quick. A few felt the sign-up process could be streamlined and that the portal could be enhanced if they could use this tool to receive communications and updates from the CFIA.

Information needs from the CFIA

Nearly 1 in 3 businesses not exclusively in retail (36%) strongly agreed that the CFIA takes the needs of businesses into account when developing new information products, and a similar proportion (31%) strongly agreed that over the past 12 months they had spent less time searching for food safety information.

Nearly 2 in 5 respondents (38%) indicate that they did not have any challenges when it comes to finding food safety information. The main challenges for businesses when it comes to finding food safety information were the lack of clear information (13%), the CFIA website not being easy to navigate (8%), as well as going through too much information (7%).

When asked specifically to identify the topics for which information was difficult to find, nearly half (46%) of all respondents felt there was no topic in particular. Some topics identified included food safety topics in general (5%), labelling (5%) and food product information (4%).

More than half of businesses (54%) indicated using the CFIA website when looking for regulatory information, while 35% used the Government of Canada website.

During the qualitative sessions, participants said the CFIA website was a powerful tool, with a lot of pertinent information. This was the main source of information for many businesses, large and small. The CFIA website has been used for a range of purposes, including finding information about licensing, importing or exporting, labeling, regulations and compliance.

Participants recognized all the information for food businesses is available at the CFIA website, however, it has been challenging finding what they need when they need it. The CFIA website was generally perceived as a tool with too many steps to get to the information they needed.

Many large businesses were aware of the licensing interactive tool and had used it. Most found it useful. Irrespective of the size of the business, fewer participants were aware of the preventive control plan and traceability interactive tools. Most thought it was good they existed although they might not use it themselves, mostly because they already have a PCP and/or a traceability program in place. A few participants mentioned a tool with information about labelling would be a good addition, so that they could easily tell if they need changes to their labels or not.

Regarding the virtual assistant, very few participants had noticed it on the CFIA website, and nearly no one had tried using it. The expectations of this tool were rather low.

Ask CFIA

In 2021, the survey also examined awareness and likelihood to use the newest digital service developed for convenient service delivery, Ask CFIA. Nearly 1 in 5 businesses (18%) were aware of Ask CFIA, with 5% having used it.

Overall, satisfaction with Ask CFIA was positive, as more than 2 in 5 users (44%) gave a satisfaction rating of 6 or 7 (on a 7-point scale), and 38% a rating of 4 or 5.

Among businesses who provided a satisfaction rating of 5 or lower, the main issues were that they felt the information was either unclear or inaccurate (36%) or that the answer they received took too long (24%). Conversely, those with higher satisfaction ratings were mostly praising how accessible and responsive the service was (29%) and that they received accurate information and the answer to what they were looking for (27%).

When asked to describe why they had used the Ask CFIA service, nearly a quarter of users (24%) described a lack of clarity on the information they had found, while more than 1 in 5 (21%) felt that it was a convenient and easy alternative.

Businesses that could not find or were unclear on the information they had found were asked to specify the amount of time they had spent searching online before utilizing Ask CFIA. Over 1 in 3 respondents (37%) spent more than 1 hour searching, while 19% spent 16 to 30 minutes.

The study explored the likelihood to use Ask CFIA in the future among those who were previously unaware of the service. To make sure all respondents had at least some information about the service, businesses not having read, seen or heard anything about Ask CFIA were provided the following overview: Ask CFIA is a digital service to provide industry with one point of entry to ask questions to help you understand and comply with current regulatory requirements.

Based on this description, 43% were very likely to use Ask CFIA in the future and another 29% were somewhat likely.

Not many participants in the qualitative sessions were aware of the Ask CFIA service. Those who had used it had mixed reviews. Some felt it had limited value because it led to receiving more links to go through, and not necessarily the answer they were looking for initially. On the other hand, a few felt they got the information they were looking for.

Social media

The vast majority of respondents (90%) did not follow the CFIA on any social media platforms. Among those who follow the CFIA on a social media platform, LinkedIn was the most popular at 5%, followed by Facebook (4%), Twitter (2%) and Instagram (2%).

Respondents would be interested in seeing social media posts outlining new or updated regulations (14%), industry specific information (6%), all food safety regulations (5%) and product recalls (4%) among others.

Over a quarter of respondents (26%) do not use social media, while another 15% said they would never follow the CFIA on social media.

Similar to the quantitative trend, participants in the qualitative sessions did not follow CFIA in social media. Participants did not express any interest in receiving information from the CFIA or following them in any social media platform.

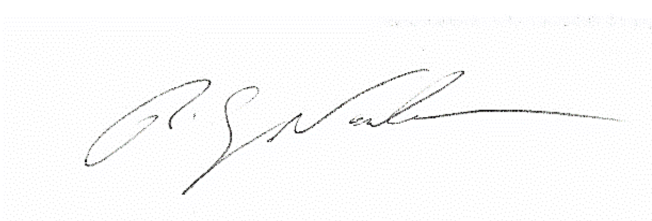
The contract value was $141,079.08 including HST.

Political neutrality certification

I hereby certify as Senior Officer of Quorus Consulting Group Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications - Appendix C.

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:



Rick Nadeau, President

Quorus Consulting Group Inc.

Detailed results

Research purpose and objectives

Since publishing the *Safe Food for Canadians Regulations* (SFCR) in Canada Gazette in June 2018, the Canadian Food Inspection Agency (CFIA) has been implementing a phased-in approach for some elements of the regulations. January 2020 marked the beginning of a new phase, implementing regulations for Fresh Fruit or Vegetables businesses. Additionally, July 2020 marked another milestone, in which the regulations were extended to businesses in the Manufactured Foods Sector (MFS), which were not previously federally registered. Given the enforcement of COVID-19 related restrictions, resource limitations for small and micro businesses are a key focus.

The CFIA activities and priorities regarding industry compliance during the pandemic remain the same as announced in April 2020. Any changes surrounding compliance and enforcement of activities with regard to the SFCR were to be announced in adequate time for businesses to adhere to legislation. Businesses were expected to comply with the *Food and Drugs Act*, the *Food and Drug Regulations*, and SFCR requirements in place prior to July 15, 2020.

The CFIA requested public opinion research to understand the Canadian food industry's views on food safety and food safety regulations, as well as the impact of the COVID-19 pandemic on the food industry and growth of e-commerce. This research helped inform the effective implementation, communications and compliance with the SFCR. Specific objectives included gaining a better understanding of industry's awareness, motivations, perceptions and attitudes towards:

- The various roles and responsibilities within the food safety system, in particular the level of awareness of their own responsibilities in the system;
- Federal food regulations as they apply to online sales and importing;
- Resource needs and barriers to complying with regulatory requirements, to identify root causes of non-compliance and support development and implementation of compliance promotion, communications, and support service activities; and,
- Current services and expectations on future services and programs

The research also explored the following:

- Challenges food businesses faced in complying with food regulations during COVID-19;
- Feedback on compliance promotion tools and communications products; and,
- Feedback on the effectiveness of the SFCR communications.

Summary of findings

The research results presented in this report are at times based on 1 of 2 different segments:

- Select questions were asked exclusively to “retail-only businesses” in the food industry – these are businesses that self-identified as only selling product to consumers and not importing, preparing food for export or to move across provincial boundaries. These businesses do need to meet traceability requirements under SFCR. For this research, data was collected from 301 retail-only businesses, and 780 non-retail only businesses.
- Other study results focus exclusively on food industry businesses that conduct at least 1 activity that has requirements under SFCR other than just retail – these are referred to as “businesses not exclusively in retail” in this report.

The report compares results with previous research waves conducted by the CFIA, whenever possible. Data from the year 2020 in this report was retrieved from the public report Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations, Final Report, POR 059-19. Data from the year 2019 in this report was retrieved from the public report Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations, Final Report, POR 066-19.

Due to the diversity of respondents and the requirement to understand multiple views, not all questions applied to every respondent. Information on the respondents for any specific question can be found in the footer of graphs and data tables presented in this report.

Some displayed results may not add to 100%. This is either due to rounding, because the results are based on questions that allowed multiple mentions or, in very rare instances, because certain response categories were not shown to improve the legibility of certain graphs or data tables.

When data tables are presented, the gray squares indicate that the result is statistically significantly different from results in other columns.

Food safety activities

In 2021, 74% of businesses very clearly understood the food safety regulations that apply to their foods (provided a rating of 6 or 7 in a 7-point scale to rate understanding). This is a lower rating compared to that observed in 2020 (79%), and higher than results observed in 2019 (69%). However, most of the remaining businesses (20% in 2021, 17% in 2020, and 23% in 2019) gave a rating of 4 or 5, or the equivalent to "somewhat clearly" understanding food regulations. When combining the top scores provided, we can see the understanding of these regulations was clear to the majority of respondents across recent waves (94% in 2021, 96% in 2020, and 92% in 2019).

Understanding of food regulations			
	2021 (n=1,081)	2020 (n=400)	2019 (n=700)
Very clearly (6-7)	74%	79%	69%
Somewhat clearly (4-5)	20%	17%	23%
Not very clearly (1-3)	6%	3%	7%

A1: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: All Respondents, 2021, n=1,081; 2020, n=400; 2019, n=700.

Understanding of the food safety regulations was stronger among processor/manufacturer businesses (81% selected a rating of 6 or 7). Understanding of food regulations decreases as the size of the businesses decreases, as 87% of large businesses rated their understanding with 6 or 7, a score that gradually drops to 65% among micro businesses.

Understanding of food regulations									
		Industry sector				**Company size**			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Very clearly (6-7)	74%	69%	**81%**	70%	74%	65%	**75%**	**78%**	**87%**
Somewhat clearly (4-5)	20%	21%	16%	24%	19%	**25%**	18%	19%	11%
Not very clearly (1-3)	6%	**10%**	2%	5%	5%	**10%**	6%	3%	2%
Don't know	1%	-	1%	<1%	2%	<1%	1%	1%	-

A1: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: All Respondents, n=1,081.

There were no major differences from a regional perspective.

Understanding of food regulations					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Very clearly (6-7)	74%	71%	78%	73%	73%
Somewhat clearly (4-5)	20%	24%	16%	20%	21%
Not very clearly (1-3)	6%	6%	5%	6%	6%
Don't know	1%	-	1%	1%	-

A1: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: All Respondents, n=1,081.

Qualitative findings:

Feedback regarding the understanding of the regulations varied depending on the size of the business, mostly because larger businesses have dedicated, or larger staff assigned to review and coordinate the compliance of the regulations. Therefore, representatives from large businesses felt it was easy to stay on top of changes to regulations. Some participants in the operations division of large businesses were less familiar with all the regulations and requirements since tasks related to compliance and regulation were divided between the operations and corporate teams.

Participants involved in understanding the food regulations for their business agreed that reading these regulations involves a lot of time, but that, by and large, the regulations are usually easy to understand. As noted later in the report, a challenge that some did bring up was relevance to their specific line of business – there is a sense that the new regulations are quite broad and that they can be subject to interpretation, something many participants did not feel comfortable doing on their own. This has prompted many participants to contact the CFIA, hoping to get a clear answer or interpretation specific to their business. Participants explained that the CFIA at times just redirected them to other information rather than providing them a more precise interpretation of the regulations as they pertain to their specific line of business.

Participants from small food businesses tended to find it more challenging to stay on top of changes in the regulations, and understanding them as well, mainly because they have just a few people dedicated to playing many roles within the company. They explained that they need to also focus on operations and do not have the time to read lengthy documentation. This was observed more among small businesses that are producers; brokers or distributors are already working in an office and are less frustrated with the length of time involved to stay on top of the regulations that apply to their business.

A list of various food safety-related measures and activities was presented to survey respondents and they were asked to note the ones that applied to their company. The most popular food safety activities include establishing a traceability program (77%), an internal training program on food safety (70%), followed by regularly sending staff on food safety training (52%). 1 in 5 respondents specified that they used technology such as blockchain or digital systems to assist food safety (20%). Traceability programs were more common in 2021 than in previous years.

Food safety activities			
	2021 (n=1,081)	2020 (n=400)	2019 (n=698)
Has a traceability program established	77%	72%	62%
Has an internal training program on food safety	70%	80%	71%
Regularly sends staff on food safety training	52%	66%	54%
Uses technology such as blockchain or similar digital system to assist food safety	20%	22%	-
None of the above	7%	2%	8%

A2: Which of the following, if any, applies at your company. Base: All Respondents, 2021, n=1,081; 2020, n=400; 2019, n=698.

These results show different trends depending on the industry sector and size of the company.

Among food safety activities and measures asked, businesses in industries whose primary activity is processing or manufacturing were the most likely to have food safety measures in place, with the exception of technology such as blockchain or digital systems. These businesses were more likely to have a traceability program established (85%), an internal program on food safety (85%) and regularly send staff on food safety training (56%). Compared to businesses in other verticals, retailers were the most likely segment to regularly send staff on food safety training (62%) but the least likely to have a traceability program established (63%).

From a company size perspective, the larger the business, the more likely they were to have most of the measures in place. As seen below, the incidence of all 4 measures increases as the size of the business increases, with figures of 80% or more among large businesses, with the exception of blockchain and digital systems (38%). Furthermore, 14% of micro businesses indicate they did not have any of the measures in place at all.

Trends per industry vertical and company size remain similar to those observed in previous waves.

Food safety activities									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler / Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Has a traceability program established	77%	**80%**	**85%**	**78%**	63%	65%	73%	**86%**	**96%**
Has an internal training program on food safety	70%	66%	**85%**	61%	66%	51%	**70%**	**80%**	**95%**
Regularly sends staff on food safety training	52%	44%	**56%**	47%	**62%**	33%	**49%**	**65%**	**80%**
Uses technology such as blockchain or similar digital systems to assist food safety	20%	17%	22%	21%	21%	8%	**18%**	**28%**	**38%**
None of the above	7%	8%	4%	7%	8%	**14%**	**6%**	1%	1%

A2: Which of the following, if any, applies at your company. Base: All Respondents, n=1,081.

From a regional perspective, results among food safety activities and measures suggested a lower level of adoption of the various measures in Quebec, with the exception of the use of blockchain or digital systems.

All other regions were more likely to have a traceability program established: Atlantic (81%), Ontario (79%), and Western Canada (79%). Results from Western Canada were highest for an internal program on food safety (76%) compared to other regions.

Food safety activities					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Has a traceability program established	77%	**81%**	69%	**79%**	**79%**
Has an internal training program on food safety	70%	65%	68%	67%	**76%**
Regularly sends staff on food safety training	52%	50%	48%	54%	55%
Uses technology such as blockchain or similar digital systems to assist food safety	20%	20%	22%	17%	22%
None of the above	7%	3%	**10%**	7%	4%

A2: Which of the following, if any, applies at your company. Base: All Respondents, n=1,081.

Qualitative findings:

Qualitative research confirms that the use of technology has been a key factor in the success of complying with the SFCR, especially to trace food, but also to stay on top of regulation changes and updates, and to process new licences. Examples given during the sessions include software to allow businesses to trace food, or to keep records. Just being at ease with the use of the Internet seemed to be critical and especially a challenge for older respondents. The need to use a computer to stay on top of regulations or to operate the business seemed to be a challenge for small businesses that are food producers, since they have to spend most of their time taking care of the food production, leaving little time for the needed administrative and compliance work.

Food safety activities that do not apply to retail-only businesses were presented only to businesses not exclusively in retail. The most popular of these food safety activities among these businesses include having written or documented operating procedures on food safety (76%) and having preventive controls in place in a written plan (66%). These were followed by having a food safety or quality control certification system (46%) and having preventive controls in place but not written or documented in a plan (42%).

Food safety activities – non-retail only			
	2021 (n=780)	2020 (n=187)	2019 (n=500)
Has written/documented standard operating procedures on food safety	76%	43%	78%
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program	66%	71%	60%
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	46%	48%	40%
Has preventive controls in place, but not written or documented plan	42%	35%	45%
None of the above	5%	3%	2%

A2: Which of the following, if any, applies at your company. Base: Business that are non-retail only, 2021, n=780; 2020, n=187; 2019, 500.

Similarly, food safety activities and measures asked to non-retail only businesses were more common among those whose primary activity is processing or manufacturing. These businesses were more likely to have written/documented standard operating procedures on food safety (85%), preventive controls in place, which were outlined in a written plan such as a Hazard Analysis and Critical Control Point (HACCP) based plan, Quality Management Program (QMP) or other program (85%), and used a food safety or quality control certification system such as Global Food Safety Initiative (GFSI), International Organization for Standardization (ISO) or Quality Management Program (QMP) (60%).

Among non-retail only businesses as well, the larger the businesses are, the more likely they were to have most of the measures in place. The incidence of having operating procedures, documented preventive controls in place, and using a food safety or quality control certification program increases as the size of the business does. Conversely, the smaller the businesses, the more likely they were to have preventive controls in place that are not written or documented in a plan.

Food safety activities-non retail only									
		Industry sector				**Company size**			
	Total (n=780)	Agriculture (n=262)	Processor/ Manufacturer (n=232)	Wholesaler / Distributor (n=210)	Retailer (n=67)	Micro (n=227)	Small (n=181)	Medium (n=302)	Large (n=67)
Has written/documented standard operating procedures on food safety	76%	71%	**85%**	73%	73%	59%	**70%**	**88%**	**98%**
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program	66%	61%	**85%**	61%	37%	43%	**56%**	**82%**	**100%**
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	46%	42%	**60%**	39%	36%	22%	**37%**	**61%**	**86%**
Has preventive controls in place, but not written or documented in a plan	42%	44%	39%	42%	45%	**47%**	**50%**	36%	28%
None of the above	5%	**6%**	1%	**6%**	**9%**	**12%**	4%	1%	-

A2: Which of the following, if any, applies at your company. Base: Business that are non-retail only, n=780.

At the regional level, results among these food safety activities and measures suggested a lower level of adoption of the various measures in Quebec, especially written or documented standard operating procedures on food safety, which 82% of businesses in Atlantic Canada reported having, 82% in Western Canada, and 77% in Ontario. Western Canada businesses were also more likely to indicate they have preventive controls in place outlined in a written plan (72%), compared to businesses in Quebec (58%). Not-retail only businesses in Atlantic Canada (60%), and Western Canada (52%) were more likely than those in Quebec (39%) and Ontario (40%) to indicate they use a food safety or quality control certification system.

Food safety activities-non retail only					
		Region			
	Total (n=780)	Atlantic (n=103)	Quebec (n=165)	Ontario (n=255)	West (n=257)
Has written/documented standard operating procedures on food safety	76%	**82%**	62%	**77%**	**82%**
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program	66%	71%	58%	63%	**72%**
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	46%	**60%**	39%	40%	**52%**
Has preventive controls in place, but not written or documented in a plan	42%	43%	43%	40%	42%
None of the above	5%	3%	**8%**	6%	2%

A2: Which of the following, if any, applies at your company. Base: Business that are non-retail only, n=780.

All respondents, regardless of their participation in a private certification scheme, were asked to indicate whether they support the role of private certification schemes in achieving compliance with food safety regulations. More than 4 in 5 respondents (83%) supported the role of private certification schemes, an increase from results observed in 2020 (79%). In both 2021 and 2020, fewer than 1 in 10 respondents did not support the role of private certification schemes (9% and 8% respectively).

Support for private certification schemes in achieving compliance with food safety regulations		
	2021 (n=1,081)	2020 (n=400)
Yes	83%	79%
No	9%	8%
Don't know / Not sure	7%	13%

A3: Whether or not you participate in a private certification scheme, do you support their role in achieving compliance with food safety regulations? Base: All Respondents, 2021, n=1,081; 2020, n=400.

When comparing results by industry, support to these types of schemes was lowest among wholesalers or distributors (78%). From a company size perspective, the larger the size of the business, the greater the support for private certification schemes. Regional comparison shows that businesses in Quebec were more likely to support (88%), compared to those in Ontario (81%).

Support for private certification scheme									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Yes	83%	**87%**	84%	78%	85%	78%	84%	**87%**	**88%**
No	9%	9%	7%	**13%**	9%	**12%**	11%	6%	6%
Don't know	7%	4%	**9%**	**9%**	6%	9%	5%	7%	6%

A3: Whether or not you participate in a private certification scheme, do you support their role in achieving compliance with food safety regulations? Base: All Respondents, 2021, n=1,081.

Support for private certification scheme					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Yes	83%	86%	**88%**	81%	82%
No	9%	6%	7%	**12%**	9%
Don't know	7%	8%	5%	7%	9%

A3: Whether or not you participate in a private certification scheme, do you support their role in achieving compliance with food safety regulations? Base: All Respondents, 2021, n=1,081.

Qualitative findings:

Businesses that use a certification system, are part of a quality program, or have hired a consultant had a smooth compliance experience when the SFCR was introduced and came into effect. Certifications and programs mentioned include Global Food Safety Initiative GFSI, Safe Quality Food (SQF) and the CanadaGAP Program. These certifications are seen as rigorous quality processes at least on par with the regulations required by the CFIA, and therefore participants are confident they comply with the SFCR as well.

A few small businesses mentioned not being aware of or able to hire external consultants, but the businesses that did hire a consultant or were part of a certification system also stated it had helped them in their regulation compliance process. It was observed that the small businesses that did not follow any of these practices, expressed more frustration regarding their experience with the SFCR.

Awareness of the CFIA and the *Safe Food for Canadians Regulations* (SFCR)

Nearly 9 in 10 businesses were at least somewhat familiar with the CFIA (89%). More specifically, 57% rated their level of familiarity either a 6 or a 7 on a 7-point scale (where 1 meant not at all familiar and 7 meant very familiar). Another 32% considered themselves somewhat familiar (a rating of 4 or 5) and 11% indicated they are not very familiar (a rating of 1 to 3). The proportion of businesses familiar with the CFIA has consistently increased in the last 2 years.

Familiarity with the CFIA			
	2021 (n=1,081)	2020 (n=400)	2019 (n=700)
Very familiar (6-7)	57%	53%	46%
Somewhat familiar (4-5)	32%	32%	35%
Not very familiar (1-3)	11%	14%	18%
Don't know	-	3%	-

B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: All Respondents, 2021, n=1,081; 2020, n=400; 2019, n=700

By looking at the results from the most recent wave of research, businesses in the processor and manufacturer segment and those in the wholesaler and distributor segment were the most familiar with the CFIA (67% and 64% respectively). Results also reveal that familiarity with the CFIA increases with the size of the company, ranging from 43% in the micro segment rating their familiarity either a 6 or a 7, up to 71% among large businesses.

Familiarity with CFIA									
		Industry sector				**Company size**			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Very familiar (6-7)	57%	50%	**67%**	**64%**	43%	42%	**61%**	**64%**	**71%**
Somewhat familiar (4-5)	32%	35%	27%	29%	**38%**	**41%**	26%	29%	25%
Not very familiar (1-3)	11%	**15%**	6%	7%	**18%**	**17%**	**12%**	7%	4%
Don't know	<1%	<1%	<1%	-	1%	<1%	<1%	<1%	-

B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: All Respondents, n=1,081.

From a regional perspective, familiarity was highest in Atlantic Canada and Ontario (62% respectively), followed by Western Canada (58%) and the lowest in Quebec (43%).

Familiarity with CFIA					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Very familiar (6-7)	57%	**62%**	43%	**62%**	**58%**
Somewhat familiar (4-5)	32%	28%	**42%**	27%	32%
Not very familiar (1-3)	11%	9%	15%	10%	10%
Don't know	<1%	-	-	<1%	1%

B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: All Respondents, n=1,081.

In 2021 and 2020, all businesses surveyed were asked specifically if they had heard, seen or read something about the *Safe Food for Canadians Regulations* (SFCR). 7 in 10 (70%) respondents were aware of the SFCR, up from 66% observed in 2020.

Have heard, seen or read something about the SFCR		
	2021 (n=1,081)	2020 (n=400)
Yes	70%	66%
No	26%	26%
Don't know	3%	8%

S8. Have you seen, read or heard anything about the Safe Food for Canadians Regulations? Base: All Respondents, 2021, n=1,081; 2020, n=400.

Sub-group trends related to SFCR awareness were similar to those related to familiarity with the CFIA overall. Results showed relatively stronger awareness of the SFCR among processors and manufacturers (84%), followed by wholesalers and distributors (76%), businesses in agriculture (64%) and finally, among those in retail (58%).

Awareness of the SFCR was greater among larger businesses (92%), and decreased as the business size did. From a regional perspective, while awareness of the CFIA was lowest in Quebec, this was the region showing the highest level of awareness of the SFCR when compared to the rest of Canada (89%).

Seen, read or heard any advertising about SFCR									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Yes	71%	64%	**84%**	**76%**	58%	62%	69%	**76%**	**92%**
No	26%	**33%**	14%	**23%**	**37%**	**35%**	**27%**	**22%**	8%
Don't know	3%	3%	2%	1%	**5%**	3%	4%	2%	-

S8. Have you seen, read or heard anything about the Safe Food for Canadians Regulations? Base: All Respondents, n=1,081.

Seen, read or heard any advertising about SFCR					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Yes	71%	69%	**89%**	65%	67%
No	26%	**29%**	11%	**31%**	**32%**
Don't know	3%	2%	1%	**5%**	2%

S8. Have you seen, read or heard anything about the Safe Food for Canadians Regulations? Base: All Respondents, n=1,081.

Qualitative findings:

Awareness of the SFCR during the qualitative sessions was clearly different between large and small businesses. All large businesses were aware and familiar with the SFCR, and therefore the CFIA. Participants from large businesses heard about the SFCR years ago, when it was announced it would take place in 2019 or even earlier.

However, awareness of the SFCR among small businesses was lower and dependent on the type of food products they managed or their type of business. For example, several participating small businesses explained they did not have products regulated by the CFIA (or at least they did not think they did), and therefore were not aware of the SFCR, and some were not very familiar with the CFIA. If the risk level of their business was low they would not have much contact with the CFIA and would be either unaware of changes in regulations or specifically the SFCR. Conversely, if they were producers or retailers of meat or fish, recognized by participants as higher risk food businesses, they would be much more familiar with the SFCR. While some of these businesses may not have been entirely familiar with the CFIA, they were familiar with the provincial departments responsible for food regulations.

Among businesses aware of the SFCR, the most common sources of information about the regulations were colleagues and industry events (33%), or the CFIA (28%), followed by general, unspecified online sources (21%), and general government sources (16%).

Other sources mentioned included pamphlets or print materials (8%), email (7%), and the CanadaGap Program. Over one quarter of respondents (28%) mentioned specifically a CFIA source of information, a similar proportion to the one observed in 2019 (30%). Other sources mentioned have changed somewhat since 2019, as shown in the graph below.

Have heard, seen or read something about the SFCR		
	2021 (n=753)	2019 (n=389)
Colleagues/industry events (general)	33%	23%
CFIA (NET)	28%	30%
From the CFIA (unspecified)	14%	5%
Online-CFIA website	10%	16%
CFIA employee/inspector	4%	8%
Through CFIA email	3%	6%
Online (general)	21%	19%
The government (general)	16%	-
Through a pamphlet/print materials (general)	8%	20%
Through email (other)	7%	26%
Through Canada GAP	4%	-
Other	8%	10%
Don't know/refused	3%	2%

S9: Where did you hear, see or read about the regulations? Base: Businesses that have heard of Safe Food for Canadians Regulations, 2021, n=753; 2019, n=389.

Businesses in retail were the most likely to say they heard about the SFCR through colleagues or industry events (44%), especially when compared to businesses in processing or manufacturing foods (30%). The latter were more likely to have heard directly from the CFIA in some way (41%), whether it was through the CFIA website, a CFIA inspector or employee or a CFIA email. The larger businesses were, the more likely they were to have heard about the SFCR through the CFIA. Micro businesses were the most likely to say they heard through colleagues (40%).

Regionally, Atlantic Canada businesses were more likely to have heard about the SFCR through the CFIA (46%) compared to those in Quebec (19%) or Ontario (25%). Western Canada businesses were also more likely to have heard through the CFIA compared to those in Quebec (33% versus 19%).

Source of information on regulations									
		Industry sector				Company size			
	Total (n=753)	Agriculture (n=198)	Processor/ Manufacturer (n=246)	Wholesaler/ Distributor (n=174)	Retailer (n=126)	Micro (n=198)	Small (n=174)	Medium (n=310)	Large (n=69)
Colleagues / industry events (general)	33%	33%	30%	31%	**44%**	**40%**	31%	29%	38%
CFIA (NET)	28%	**23%**	**41%**	**30%**	7%	14%	**24%**	**36%**	**46%**
From the CFIA (unspecified)	14%	**13%**	**18%**	**16%**	3%	5%	**13%**	**18%**	**24%**
Online - CFIA website	10%	4%	**17%**	**11%**	1%	5%	4%	**14%**	16%
CFIA employee / inspector	4%	5%	4%	3%	4%	3%	6%	4%	2%
Through CFIA email	3%	1%	**5%**	2%	1%	2%	4%	2%	5%
Online (general)	21%	20%	23%	22%	18%	25%	23%	20%	14%
The government (general)	16%	14%	15%	8%	**29%**	**16%**	19%	14%	11%
Through a pamphlet / print (general)	8%	10%	6%	8%	7%	16%	7%	3%	4%
Through email (other)	7%	7%	8%	8%	5%	7%	7%	7%	8%
Through CanadaGAP	4%	**11%**	1%	2%	1%	1%	2%	**6%**	**6%**
Other	8%	**10%**	**9%**	3%	**12%**	7%	11%	7%	4%
Don't know/Refused	3%	2%	2%	4%	2%	2%	4%	2%	-

S9: Where did you hear, see or read about the regulations? Base: Businesses that have heard of Safe Food for Canadians Regulations, 2021, n=753.

Source of information on regulations					
		Region			
	Total (n=753)	Atlantic (n=98)	Quebec (n=204)	Ontario (n=234)	West (n=217)
Colleagues / industry events (general)	33%	28%	38%	33%	32%
CFIA (NET)	28%	**46%**	19%	25%	**33%**
From the CFIA (unspecified)	14%	**24%**	7%	**14%**	**15%**
Online - CFIA website	10%	10%	8%	6%	**14%**
CFIA employee / inspector	4%	**10%**	3%	4%	3%
Through CFIA email	3%	**6%**	<1%	3%	**3%**
Online (general)	21%	14%	**26%**	21%	20%
The government (general)	16%	4%	**25%**	**18%**	10%
Through a pamphlet / print (general)	8%	9%	6%	9%	7%
Through email (other)	7%	**15%**	3%	8%	8%
Through CanadaGAP	4%	5%	**7%**	3%	1%
Other	8%	7%	6%	9%	9%
Don't know/Refused	3%	3%	1%	2%	4%

S9: Where did you hear, see or read about the regulations? Base: Businesses that have heard of Safe Food for Canadians Regulations, 2021, n=753.

Qualitative findings:

Businesses that have third-party auditors or consultants (primarily large businesses) rely on these as their source for information on changes or updates to the regulations.

The experience from small businesses was quite different. Most have heard just recently, while others have not heard about SFCR at all. In addition, participants from small food businesses expressed they do not always know how to find out if there have been changes to the regulations or not, other than regularly checking the CFIA website. However, regularly checking the website was often considered a discouraging task since they feel changes to a regulation were not necessarily easy to find on any website. Instead, participants said they rely on business groups, associations, or even colleagues in the industry, to keep informed and to discuss and understand how the regulations should be interpreted and how these might impact their business.

Irrespective of whether they had seen, read or heard anything about the new regulations, businesses were asked if they thought the new regulations would apply to their business. Over 7 in 10 (71%) businesses believed the new regulations would apply to their business, which reflects the awareness level for the new regulations. The new regulations have increased relevance among businesses, up from 64% in 2020. More than 1 in 10 (15%) believed the regulations would not apply to their business while 15% did not know.

Perceived relevance of new regulations

	2021 (n=1,081)	2020 (n=400)
Yes	71%	64%
No	14%	8%
Don't know	15%	28%

S10: As far as you know, do you think the new Safe Food for Canadians Regulations will apply to your business? Base: All Respondents, 2021, n=1,081; 2020, n=400.

Across the various sub-groups, results from 2021 reveal that perceived relevance was highest among processors and manufacturers (85%), and lowest among those in agriculture (52%). Perceived relevance also increased with the size of the business, ranging from 61% among micro businesses, to 92% among large ones. Regionally, perceived relevance was highest in Quebec (84%) and Western Canada (73%). In addition, ethnic retailers[2] were more likely to perceive the regulations apply to their business, compared to non-ethnic retailers (83% versus 61%).

Perceived relevance of new regulations									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Yes	71%	57%	**85%**	**74%**	**68%**	61%	69%	**78%**	**92%**
No	14%	**22%**	6%	11%	11%	**22%**	12%	7%	6%
Don't know	15%	**21%**	9%	14%	**20%**	**17%**	**19%**	**15%**	3%

S10: As far as you know, do you think the new Safe Food for Canadians Regulations will apply to your business? Base: All Respondents, n=1,081.

Perceived relevance of new regulations					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Yes	71%	68%	**84%**	63%	**73%**
No	14%	13%	9%	**16%**	11%
Don't know	15%	**19%**	7%	**21%**	**16%**

S10: As far as you know, do you think the new Safe Food for Canadians Regulations will apply to your business? Base: All Respondents, n=1,081.

Qualitative findings:

Irrespective of the size of the businesses, participants considered the new regulations to be broader or less specific than previous regulations. A few felt that even when they contacted the CFIA for clarification, the agency did not give specific guidance or regulation interpretation specific to the business, but rather provided more general information which could be frustrating for businesses looking for specificities.

For large businesses, the broad regulations were typically considered an inconvenience rather than a challenge. To clarify any doubts on the relevance of the regulations, these businesses would either call the CFIA, ask their usual inspector, or consult their compliance team. However, the experience for small businesses was different, as they did not typically have a "regular" inspector to contact, and calling the CFIA would typically not lead them to an answer on how relevant or applicable the regulation or the change of a regulation was to their business. As a result, at the time of the inspection, both the inspector and the business could have a different interpretation of a regulation, potentially making the business non-compliant.

When specifically asked about the 3 key elements of the SFCR, results reveal that 82% of businesses were aware that the new regulations required most businesses to have product

[2] Retail businesses whose product offerings consist of at least 25% "ethnic foods", specialty food products that are specifically, but not exclusively, targeted to specific communities.

traceability processes. Awareness decreases to 71% for the written preventive control plan and then to 66% for the licence from CFIA.

Awareness of *Safe Food for Canadians Regulations* requirements	
	2021 (n=1,081)
Have a traceability process	82%
Have a written preventive control plan	71%
Have a licence from the CFIA	66%
None of the above	13%

B2: Were you aware that the proposed Safe Food for Canadians Regulations require most businesses regulated by CFIA to…
Base: All Respondents, 2021, n=1,081.

Awareness of these 3 requirements was consistently lower among businesses in the retail sector and became progressively lower as the size of the business decreased. Furthermore, awareness of the requirement to have a written preventive control plan was also relatively lower among businesses in the agriculture segment (65%).

Awareness of *Safe Food for Canadians Regulations* requirements									
		Industry sector				**Company size**			
	Total (n=1,081)	**Agriculture (n=306)**	**Processor/ Manufacturer (n=289)**	**Wholesaler/ Distributor (n=243)**	**Retailer (n=231)**	**Micro (n=331)**	**Small (n=255)**	**Medium (n=416)**	**Large (n=75)**
Have product traceability processes	82%	**82%**	**88%**	**85%**	69%	74%	79%	**88%**	**95%**
Have a written preventive control plan	71%	65%	**84%**	**73%**	58%	56%	**69%**	**79%**	**94%**
Have a licence from CFIA	66%	**58%**	**80%**	**75%**	48%	58%	60%	**72%**	**92%**
None of the above	13%	**15%**	9%	9%	**21%**	**20%**	**14%**	8%	3%

B2: Were you aware that the proposed Safe Food for Canadians Regulations require most businesses regulated by CFIA to… Base: All Respondents, n=1,081.

Regionally, Atlantic Canada's businesses were more likely to be aware of the requirement to have a licence from CFIA (82%), compared to the rest of the regions (64%). Both Atlantic Canada (78%) and Western Canada (75%) businesses were more likely to be aware of the requirement to have a written preventive control plan than businesses in Quebec (65%).

Awareness of *Safe Food for Canadians Regulations* requirements					
	Region				
	Total (n=1,081)	**Atlantic (n=139)**	**Quebec (n=230)**	**Ontario (n=371)**	**West (n=341)**
Have product traceability processes	82%	84%	83%	81%	81%
Have a written preventive control plan	71%	**78%**	65%	67%	**75%**
Have a licence from CFIA	66%	**82%**	60%	61%	69%
None of the above	13%	10%	12%	15%	13%

B2: Were you aware that the proposed Safe Food for Canadians Regulations require most businesses regulated by CFIA to… Base: All Respondents, n=1,081.

Awareness of new *Safe Food for Canadians Regulations* (SFCR) requirements among specific sectors

Businesses that prepare, process, treat, manufacture or preserve food for export were asked if their food products were also sold within their province or territory. The majority of these businesses only sell their food products in other regions within Canada or export products outside of the country (73%).

Distribution within local province or territory	
Yes	27%
No	73%
Don't know / Not sure	-

S6: Do you prepare, process, treat, manufacture or preserve food to be sold only within your province or territory? Base: Businesses who prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders, n=269.

Companies that also sell retail were more likely to exclusively distribute locally within their province or territory when compared to businesses in other industry verticals. Regionally, businesses in Quebec more commonly operated within their province. As well, the smaller the size of the business, the more likely they were to have food products sold only within their province or territory, ranging from 47% among micro businesses to 14% among large businesses.

Provincial or territorial distribution									
		Industry sector				**Region**			
	Total (n=269)	Agriculture (n=68)	Processor/ Manufacturer (n=154)	Wholesaler/ Distributor (n=34)	Retailer (n=11)	Atlantic (n=41)	Quebec (n=70)	Ontario (n=67)	West (n=91)
Yes	27%	37%	19%	36%	65%	17%	41%	36%	12%
No	73%	63%	80%	64%	35%	83%	58%	63%	87%
Don't know / Not Sure	1%	<1%	1%	-	-	-	1%	1%	<0%

S6: Do you prepare, process, treat, manufacture or preserve food to be sold only within your province or territory? Base: Businesses who prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders, n=269.

Provincial or territorial distribution					
		Company size			
	Total (n=269)	Micro (n=50)	Small (n=53)	Medium (n=121)	Large (n=45)
Yes	27%	47%	35%	19%	14%
No	73%	51%	65%	80%	86%
Don't know / Not Sure	1%	1%	-	1%	<1%

S6: Do you prepare, process, treat, manufacture or preserve food to be sold only within your province or territory? Base: Businesses who prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders, n=269.

Among businesses that grow fruit, vegetables or grains, more than half (57%) were aware of the new SFCR requirements that were introduced for the Fresh Fruit and Vegetable sector on January 15th, 2020.

Awareness of new SFCR requirements for the fresh fruit and vegetable sector	
Yes	57%
No	38%
Don't know / Not sure	5%

S11: Did you know that new requirements of the Safe Food for Canada Regulations came into force for the Fresh Fruit and Vegetable sector on January 15, 2020? Base: Businesses that grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders, n=146.

Regionally, growers in Atlantic Canada were the most likely to be aware of the new SFCR requirements (85%), followed by those in Quebec (72%) and then those in Western Canada (48%) and Ontario (46%). As well, the larger the size of the grower, the more they tended to be aware of the new SFCR requirements.

Awareness of the new SFCR requirements for the fresh fruit and vegetable sector									
		Industry sector				**Region**			
	Total (n=146)	Agriculture (n=114)	Processor/ Manufacturer (n=14)	Wholesaler/ Distributor (n=7)	Retailer (n=1)	Atlantic (n=22)	Quebec (n=29)	Ontario (n=50)	West (n=45)
Yes	57%	52%	78%	80%	-	85%	72%	46%	48%
No	38%	43%	22%	-	100%	8%	28%	45%	50%
Don't know / Not Sure	5%	6%	-	20%	-	7%	-	10%	3%

S11: Did you know that new requirements of the Safe Food for Canada Regulations came into force for the Fresh Fruit and Vegetable sector on January 15, 2020? Base: Businesses that grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders, n=146.

Awareness of the new SFCR requirements for the fresh fruit and vegetable sector		
		Company size

	Total (n=146)	Micro (n=41)	Small (n=33)	Medium (n=54)	Large (n=18)
Yes	57%	29%	26%	84%	92%
No	38%	71%	58%	11%	8%
Don't know / Not Sure	5%	-	16%	5%	-

S11: Did you know that new requirements of the Safe Food for Canada Regulations came into force for the Fresh Fruit and Vegetable sector on January 15, 2020? Base: Businesses that grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders, n=146.

Processing or manufacturing businesses whose main product includes confectionary items or processed grain-based foods were asked whether they were aware of the new requirements as of July 15th, 2020. Results reveal that 63% of businesses were aware of the new requirements relating to their sector.

Awareness of new SFCR requirements for certain processing or manufacturing businesses	
Yes	63%
No	35%
Don't know/Not sure	3%

S3b: Did you know that new requirements for this sector came into force on July 15, 2020? Base: Processing or manufacturing businesses whose main product of your business include confectionary items, snack foods, beverages, oils, dried herbs and spices, nuts and seeds, coffee and tea, or processed grain-based foods such as baked goods, cereals and pasta, n=133.

Processing or manufacturing businesses operating in Western Canada (83%) and Ontario (68%) more commonly indicated that they were aware of the new requirements, while less than half of those in Quebec (40%) and Atlantic Canada (38%) were aware. Small processing or manufacturing businesses were the most likely to not be aware of the new requirements impacting their sector (54%).

Awareness of the new SFCR requirements for certain processing or manufacturing business									
		Region				**Company size**			
	Total (n=133)	Atlantic (n=10)	Quebec (n=42)	Ontario (n=37)	West (n=44)	Micro (n=32)	Small (n=31)	Medium (n=55)	Large (n=15)
Yes	63%	38%	40%	68%	83%	55%	46%	78%	64%
No	35%	62%	59%	23%	17%	37%	54%	22%	35%
Don't know / Not Sure	3%	-	<1%	8%	1%	8%	-	<1%	1%

S3b: Did you know that new requirements for this sector came into force on July 15, 2020? Base: Processing or manufacturing businesses whose main product of your business include confectionary items, snack foods, beverages, oils, dried herbs and spices, nuts and seeds, coffee and tea, or processed grain-based foods such as baked goods, cereals and pasta, n=133.

Confidence in meeting regulations and impressions of the CFIA

Businesses were asked to specify whether they have a process in place that allows them to trace back their food to the company that supplied it. Over 8 in 10 businesses (81%) had a traceability process in place.

Traceability processes		
	2021 (n=1,081)	2020 (n=400)
Yes	81%	83%
No	16%	15%
Don't know / Not sure	3%	2%

S7: Do you have a process in place that will allow you to trace back your food to the company that supplied it? Base: All Respondents, 2021, n=1,081; 2020, n=400

Among the various sub-groups, results from 2021 reveal that traceability processes were more common among processers and manufacturers (87%), wholesalers and distributors (87%) and retailers (85%) compared to those in the agriculture sector (66%). The likelihood of having a traceability process in place increased with the size of the business, ranging from 71% among micro business, to 94% among large businesses. Businesses operating in Ontario (84%) and Western Canada (83%) were more likely to have traceability processes in place compared to businesses in Quebec (74%).

Traceability process in place									
		Industry sector				**Company size**			
	Total (n=1,081)	**Agriculture (n=306)**	**Processor/ Manufacturer (n=289)**	**Wholesaler/ Distributor (n=243)**	**Retailer (n=231)**	**Micro (n=331)**	**Small (n=255)**	**Medium (n=416)**	**Large (n=75)**
Yes	81%	66%	**87%**	**87%**	**85%**	71%	**80%**	**87%**	**94%**
No	16%	**27%**	13%	11%	12%	**23%**	**18%**	10%	4%
Don't know	3%	**7%**	0%	2%	3%	**5%**	1%	2%	2%

S7: Do you have a process in place that will allow you to trace back your food to the company that supplied it? Base: All Respondents, 2021, n=1,081.

Traceability process in place					
		Region			
	Total (n=1,081)	**Atlantic (n=139)**	**Quebec (n=230)**	**Ontario (n=371)**	**West (n=341)**
Yes	81%	82%	74%	**84%**	**83%**
No	16%	15%	**22%**	14%	14%
Don't know	3%	3%	4%	3%	3%

S7: Do you have a process in place that will allow you to trace back your food to the company that supplied it? Base: All Respondents, 2021, n=1,081.

Further analysis reveals that 12% of the businesses aware that the new regulations require most businesses regulated by the CFIA to have product traceability processes did not have a traceability process in place.

Traceability process in place			
		Awareness of traceability process as a requirement of SFCR	
	Total (n=1,081)	Aware (n=878)	Unaware (n=203)
Yes	81%	**86%**	61%
No	16%	12%	**32%**
Don't know	3%	2%	6%

S7: Do you have a process in place that will allow you to trace back your food to the company that supplied it? / B2: Were you aware that the proposed Safe Food for Canadians Regulations require most businesses regulated by CFIA to… Base: All Respondents, 2021, n=1,081.

Businesses not exclusively in retail were asked which of the 3 SFCR key elements would be the biggest challenge for food businesses. Results were somewhat evenly split, as 29% selected written preventive controls as the biggest food safety challenge, followed by traceability of food products (25%), and 21% selected licensing. In 2021, 25% of respondents indicated none of the key elements would be a challenge for food businesses.

Challenges for food businesses			
	2021 (n=780)	2020 (n=187)	2019 (n=500)
Written preventive controls	29%	27%	30%
Traceability of food products	25%	24%	45%
Licensing	21%	15%	16%
None of the above	25%	34%	9%

B3: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be… Base: Businesses that are not retail only, 2021, n=780; 2020, n=187; 2019, n=500.

In 2021, traceability is the most likely to be considered the biggest challenge among businesses in the retail sector (42%), compared to businesses from other sectors (24%), consistent with previous waves. Micro businesses were more likely to report licensing as the greatest challenge (27%), compared to large companies (13%), while small businesses were more likely to flag having written preventive controls (39%) as a challenge compared to businesses of other sizes (26%).

Challenges for food businesses									
		Industry sector				**Company size**			
	Total (n=780)	Agriculture (n=262)	Processor/ Manufacturer (n=232)	Wholesaler/ Distributor (n=210)	Retailer (n=67)	Micro (n=227)	Small (n=181)	Medium (n=302)	Large (n=67)
Written preventive controls	29%	28%	31%	30%	19%	26%	**39%**	27%	20%
Traceability of food products	25%	22%	23%	26%	**42%**	23%	21%	27%	35%
Licensing	21%	24%	22%	17%	18%	**27%**	17%	20%	13%
None of the above	25%	25%	24%	27%	21%	24%	23%	26%	32%

B3: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be… Base: Businesses that are not retail only, n=780

From a regional perspective, businesses in Atlantic Canada (41%) were more likely to select written preventive controls as the biggest challenge, compared to businesses in Western Canada (25%) or Ontario (24%). Licensing was more likely to be identified as a challenge among businesses in Ontario (25%) compared to businesses in Quebec (15%).

Challenges for food businesses					
		Region			
	Total (n=780)	Atlantic (n=103)	Quebec (n=165)	Ontario (n=255)	West (n=257)
Written preventive controls	29%	**41%**	34%	24%	25%
Traceability of food products	25%	24%	32%	22%	24%
Licensing	21%	20%	15%	**25%**	20%
None of the above	25%	15%	19%	**28%**	**30%**

B3: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be… Base: Businesses that are not retail only, n=780.

Qualitative findings:

The research revealed that in terms of the 3 main elements of the SFCR, licensing was the most well-known process among businesses. The process of renewing a licence was usually seen as easy and clear. Nearly all participants used the My CFIA portal for their licence renewals. This experience was similar for both large and small food businesses. Nearly all focus group and interview participants had a licence before the new regulations were introduced. Of the few who have been required to obtain a licence, either because of a change in their business model or because of the regulations, the experience was considered straightforward.

As for preventive control plans (PCPs), small food businesses were less aware of this requirement, and those who were aware tended to already have a plan in place. Very few businesses, large or small, reported any specific issues or challenges preparing written PCPs or updating existing plans in light of the new regulations.

In terms of traceability, one of the more notable challenges for larger businesses was in having small suppliers who were not SFCR compliant, since this could affect their own ability to comply as well. Older, less tech savvy respondents found needing to use software to help trace food products challenging. While not many small businesses were aware of this element or the need to have traceability records to be compliant with the SFCR, challenges included the transfer of all paper records to a digital version, and the lack of time to be able to do so. That said, most medium to large businesses already had traceability programs in place and, at most, might have needed only to update them somewhat to align with SFCR, something they considered fairly easy to do.

Another challenging aspect of SFCR, especially for smaller businesses, was the labeling of food products. Many mentioned different labelling issues based on changes to the regulations. There was a lot of confusion as to how these rules have changed and how to apply them. Many participants saw this as a simple issue, in the sense that an example posted online could save many doubts, as opposed to regulations' interpretation. Participants representing small businesses were also concerned with the costs associated with having to comply with new labelling rules (that is new software, man hours, having to print new labels, etc.) and remaining price competitive since many do not want to pass the cost on to their clients.

Roughly 4 in 5 businesses (79%) felt very confident (gave a rating of 6 or 7 on a 7-point confidence scale) that they would meet food safety regulations and requirements if they were to be inspected. Among the remaining respondents, 15% felt somewhat confident (gave a rating of 4 or 5) and only 4% were not very confident (gave a rating of 1 to 3). As the number of new regulations and requirements increased from previous waves, businesses feeling "very confident" have dropped from 92% in 2019 to the current 79%, a similar rating to what was observed in 2020 (80%). However, the number of "somewhat confident" respondents has increased significantly from 2019 (6% to 15%).

Confidence in meeting food safety regulations

	2021 (n=1,081)	2020 (n=400)	2019 (n=700)
Very confident (6-7)	79%	80%	92%

Somewhat confident (4-5)	15%	15%	6%
Not very confident (1-3)	4%	2%	1%
Don't know	2%	2%	1%

B4: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: All Respondents, 2021, n=1,081; 2020, n=400; 2019, n=700.

The larger the size of the business, the greater the level of confidence that they would meet requirements, with virtually all large companies very confident (95%), compared to 74% of micro businesses. Micro, small and medium companies were more likely to be somewhat confident (16%, 19%, and 15% respectively), compared to large companies (4%). Micro businesses were more likely to indicate they are not very confident (8%), compared to medium (2%) and large businesses (1%). There were no statistically significant differences across industry verticals or by region.

Confidence in meeting food safety regulations

		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Very confident (6-7)	79%	77%	79%	80%	79%	74%	76%	**83%**	**95%**
Somewhat confident (4-5)	15%	14%	17%	15%	16%	**16%**	**19%**	**15%**	4%
Not very confident (1-3)	4%	6%	4%	3%	4%	**8%**	4%	2%	1%
Don't know	2%	**3%**	<1%	2%	1%	3%	2%	1%	-

B4: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: All Respondents, n=1,081.

Confidence in meeting food safety regulations

		Region			
	Total (n=1,081)	**Atlantic (n=139)**	**Quebec (n=230)**	**Ontario (n=371)**	**West (n=341)**
Very confident (6-7)	79%	79%	82%	77%	80%
Somewhat confident (4-5)	15%	19%	12%	17%	14%
Not very confident (1-3)	4%	-	4%	5%	5%
Don't know	2%	2%	2%	1%	2%

B4: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: All Respondents, n=1,081.

The majority of those who were very confident that they would meet regulations and requirements if they were inspected today attribute this confidence to the fact that they believe they follow the rules and /or comply with regulations (56%). Another 23% were confident because they are inspected regularly / have received positive feedback, and just over one tenth felt they make an effort keep documentation and paperwork (14%), have a full food safety program in place (13%), or have never had an issue in the past (12%).

Among those who provided lower confidence ratings (somewhat or not very confident), 29% felt that there is always room for improvement, 28% felt they follow the rules, and 27% were not familiar with all of the current regulations or requirements.

Additionally, ethnic retailers were more likely to indicate inspectors will always find something wrong or something to improve, compared to non-ethnic retailers (25% versus 11%).

Reasons for rating			
AMONG BUSINESSES VERY CONFIDENT (CONFIDENCE RATING OF 6 OR 7)		**AMONG BUSINESSES SOMEWHAT CONFIDENT OR NOT VERY CONFIDENT** (CONFIDENCE RATING OF 1 TO 5)	
	n=855		n=207
We follow the rules / comply with regulations	56%	Inspectors will always find something / there is always room for improvement	29%
We are inspected regularly / have received positive feedback	23%	We follow the rules / comply with regulations	28%
We keep our documentation / paperwork	14%	We are not familiar with all current regulations and requirements	27%
We have a full food safety program in place	13%	We only carry low-risk products	8%
We have never had an issue in the past	12%	We keep our documentation / paperwork	7%
We have recently passed an audit	9%	We are inspected regularly / have received positive feedback	6%
We keep everything clean / organized	9%	We have a full food safety program in place	4%
Inspectors will always find something / there is always room for improvement	7%	We keep everything clean / organized	3%
We only carry low-risk products	5%	We have never had an issue in the past	2%
We are not familiar with all current regulations and requirements	4%	We have recently passed an audit	1%
Other	4%	Other	10%
Don't know/ Refused	4%	Don't know/ Refused	7%

B5: Please expand on why you provided that answer. Base: Businesses who provided a score in B4, n=1,062.

Respondents were asked to specify their level of awareness of the CFIA's Establishment-based Risk Assessment on a scale of 1 to 7, where 1 meant nothing at all and 7 meant a great deal. Nearly 1 in 5 businesses (18%) had read or heard a great deal (scores of 6 or 7), while 29% were somewhat aware (scores of 4 or 5). Half of businesses (50%) did not have much exposure to Establishment Risk Analysis (scores of 1 to 3).

Awareness of establishment risk analysis

Great deal (6-7)	18%
Some (4-5)	29%
Not much (1-3)	50%
Don't know	3%

B6: As you may know the CFIA assesses risk to help determine which types of companies need to be inspected. This is often referred to as Establishment-based Risk Assessment. On a scale of 1 to 7, where 1 means nothing at all and 7 means a great deal, how much have you read or heard about Establishment Risk Analysis? Base: All Respondents, 2021, n=1,081.

When comparing industry sectors, processors or manufacturers (28%) and wholesalers or distributors (20%) were more likely than those in agriculture (12%) and retail (10%), to have read or heard a great deal about Establishment Risk Analysis. All other sectors tended to have limited exposure to Establishment Risk Analysis when compared to processors or manufacturers. The larger the size of the business, the greater the awareness level, ranging from 14% among micro businesses to 30% among large businesses. No major differences could be found when comparing regions across Canada.

Awareness of establishment risk analysis									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Great deal (6-7)	18%	12%	**28%**	**20%**	10%	14%	17%	**21%**	**30%**
Some (4-5)	29%	26%	**35%**	29%	26%	27%	30%	29%	33%
Not much (1-3)	50%	**60%**	34%	**47%**	**58%**	**56%**	47%	48%	35%
Don't know	3%	1%	2%	4%	**6%**	2%	**6%**	2%	2%

B6. On a scale of 1 to 7, where 1 means nothing at all and 7 means a great deal, how much have you read or heard about Establishment Risk Analysis? Base: All Respondents, 2021, n=1,081.

Awareness of establishment risk analysis					
		Region			
	Total (n=1,081)	**Atlantic (n=139)**	**Quebec (n=230)**	**Ontario (n=371)**	**West (n=341)**
Great deal (6-7)	18%	21%	19%	15%	20%
Some (4-5)	29%	32%	32%	29%	26%
Not much (1-3)	50%	42%	46%	53%	51%
Don't know	3%	5%	3%	3%	2%

B6: On a scale of 1 to 7, where 1 means nothing at all and 7 means a great deal, how much have you read or heard about Establishment Risk Analysis? Base: All Respondents, 2021, n=1,081.

Roughly half of businesses strongly agreed that the CFIA is fair when inspecting food businesses (52%), that inspections are conducted in a consistent manner (48%) and that inspections follow rigorous logic (47%).

Agreement drops slightly when assessing if information from the CFIA arrives in a timely manner (44%) and that it is easy to understand the guidance provided by the CFIA (40%). Over 1 in 10 respondents agreed that the CFIA is not responsive when asked regulatory questions (15%), and that regulatory guidance is inconsistent (14%). Concerns over the responsiveness of the CFIA have increased from 6% in 2020 to 15% in 2021, while the rest of the CFIA metrics have remained relatively consistent across the previous research waves.

General impressions of the CFIA			
	2021 (n=1,081)	2020 (n=400)	2019 (n=700)
CFIA is fair when inspecting food businesses	52%	58%	55%
The CFIA inspections are conducted in a consistent manner	48%	45%	-
CFIA inspections follow rigorous logic	47%	50%	-
Information from the CFIA arrives in a timely manner	44%	47%	49%
It is easy to understand the guidance the CFIA provides food businesses	40%	44%	-
The CFIA is not responsive when I ask regulatory questions	15%	6%	-
CFIA regulatory guidance is inconsistent	14%	11%	-

B7: On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: All Respondents, n=1,081; 2020, n=400; 2019, n=700.

Respondents who have been inspected by the CFIA and those who have been in contact with the CFIA over the past 12 months were more likely to agree with all positive statements related to their impressions of the CFIA, and were more likely to disagree with the negative statements.

General impression of the CFIA			
		Was inspected by the CFIA within the past 12 months	**Had contact with CFIA within the past 12 months**

	Total (n=1,081)	Yes (n=219)	No (n=348)	Yes (n=377)	No (n=190)
CFIA is fair when inspecting food businesses					
Strongly agree (6-7)	52%	**73%**	45%	**61%**	41%
Somewhat agree (4-5)	21%	19%	22%	21%	21%
Do not agree (1-3)	8%	6%	9%	8%	8%
Don't know	18%	2%	**25%**	10%	**30%**
The CFIA inspections are conducted in a consistent manner					
Strongly agree (6-7)	48%	**65%**	41%	**55%**	37%
Somewhat agree (4-5)	19%	19%	19%	**23%**	14%
Do not agree (1-3)	11%	12%	11%	10%	12%
Don't know	22%	3%	**30%**	12%	**37%**
CFIA inspections follow rigorous logic					
Strongly agree (6-7)	47%	**57%**	43%	**55%**	35%
Somewhat agree (4-5)	24%	27%	22%	26%	20%
Do not agree (1-3)	10%	10%	9%	9%	11%
Don't know	20%	5%	**26%**	10%	**34%**
Information from the CFIA arrives in a timely manner					
Strongly agree (6-7)	44%	**59%**	38%	**51%**	33%
Somewhat agree (4-5)	26%	29%	25%	**31%**	20%
Do not agree (1-3)	13%	8%	**15%**	11%	16%
Don't know	17%	3%	**23%**	6%	**32%**
It is easy to understand the guidance the CFIA provides food businesses					
Strongly agree (6-7)	40%	**51%**	36%	**44%**	34%
Somewhat agree (4-5)	32%	35%	30%	**36%**	26%
Do not agree (1-3)	18%	12%	**20%**	18%	18%
Don't know	11%	2%	**14%**	2%	**22%**
The CFIA is not responsive when I ask regulatory questions					
Strongly agree (6-7)	15%	14%	15%	**17%**	12%
Somewhat agree (4-5)	18%	22%	16%	**23%**	12%
Do not agree (1-3)	44%	**57%**	39%	**51%**	34%
Don't know	23%	7%	**30%**	9%	**42%**
CFIA regulatory guidance is inconsistent					
Strongly agree (6-7)	14%	17%	13%	**17%**	10%
Somewhat agree (4-5)	21%	19%	21%	**23%**	17%
Do not agree (1-3)	47%	**59%**	42%	**53%**	39%
Don't know	19%	6%	**24%**	7%	**34%**

B7: On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: All Respondents, n=1,081.

Impressions of the CFIA across the 4 major industry verticals show that processors or manufacturers were more likely to agree with all of the positive statements regarding the CFIA and were more likely to disagree with the negative statements. Agriculture businesses and retailers were more likely to report not knowing, suggesting a lack of familiarity with the CFIA compared to processors or manufacturers and wholesalers or distributors. The larger the size of the business, the more likely the level of agreement with the positive performance metrics of the CFIA, and the higher the level of disagreement that the CFIA is not responsive or that regulatory guidance is inconsistent.

General impression of the CFIA			
		Industry vertical	**Company size**

	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler / Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
CFIA is fair when inspecting food businesses									
Strongly agree (6-7)	52%	47%	**63%**	54%	44%	37%	**56%**	**58%**	**77%**
Somewhat agree (4-5)	21%	23%	20%	22%	19%	**25%**	20%	20%	11%
Do not agree (1-3)	8%	**9%**	3%	8%	**12%**	11%	7%	7%	5%
Don't know	18%	**21%**	13%	16%	**24%**	**27%**	**17%**	14%	7%
The CFIA inspections are conducted in a consistent manner									
Strongly agree (6-7)	48%	41%	**57%**	48%	41%	34%	**56%**	**51%**	**60%**
Somewhat agree (4-5)	19%	21%	16%	**23%**	14%	20%	14%	21%	17%
Do not agree (1-3)	11%	11%	14%	9%	10%	14%	11%	9%	10%
Don't know	22%	**27%**	13%	19%	**34%**	**32%**	19%	19%	14%
CFIA inspections follow rigorous logic									
Strongly agree (6-7)	47%	40%	**61%**	46%	37%	35%	**52%**	**49%**	**70%**
Somewhat agree (4-5)	24%	27%	21%	24%	23%	24%	22%	25%	19%
Do not agree (1-3)	10%	11%	9%	10%	8%	**14%**	8%	8%	6%
Don't know	20%	**21%**	9%	**20%**	**32%**	**28%**	**18%**	**18%**	6%
Information from the CFIA arrives in a timely manner									
Strongly agree (6-7)	44%	38%	**53%**	46%	36%	28%	**51%**	**48%**	**66%**
Somewhat agree (4-5)	26%	26%	25%	30%	22%	**30%**	18%	**28%**	27%
Do not agree (1-3)	13%	15%	12%	11%	14%	**15%**	**15%**	**11%**	3%
Don't know	17%	**20%**	9%	13%	**28%**	**27%**	**16%**	**12%**	4%
It is easy to understand the guidance the CFIA provides food businesses									
Strongly agree (6-7)	40%	31%	**45%**	**42%**	41%	31%	**42%**	**43%**	**49%**
Somewhat agree (4-5)	32%	35%	32%	31%	27%	29%	31%	33%	36%
Do not agree (1-3)	18%	**21%**	17%	**20%**	12%	**22%**	17%	16%	9%
Don't know	11%	**13%**	5%	7%	**20%**	**17%**	10%	7%	6%
The CFIA is not responsive when I ask regulatory questions									
Strongly agree (6-7)	15%	10%	15%	**21%**	13%	12%	18%	15%	12%
Somewhat agree (4-5)	18%	**22%**	18%	19%	12%	19%	16%	18%	20%
Do not agree (1-3)	44%	39%	**56%**	42%	37%	38%	43%	**48%**	**55%**
Don't know	23%	**29%**	12%	18%	**38%**	**31%**	**24%**	19%	13%
CFIA regulatory guidance is inconsistent									
Strongly agree (6-7)	14%	10%	**15%**	**23%**	8%	14%	16%	12%	15%
Somewhat agree (4-5)	21%	23%	22%	19%	18%	18%	24%	21%	19%
Do not agree (1-3)	47%	47%	**52%**	45%	42%	40%	41%	**54%**	**56%**
Don't know	19%	**20%**	11%	13%	**33%**	**29%**	18%	12%	10%

B7: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: All Respondents, n=1,081.

Regionally, businesses in Atlantic Canada were more likely to rate the CFIA as fair when inspecting food businesses when compared to businesses in Quebec (60% versus 47%). Atlantic Canada and Western Canada businesses were more likely than those in Ontario to agree information arrives in a timely manner (52% and 48% versus 39%). Businesses in Quebec were more likely than those in Ontario to agree the CFIA inspections follow rigorous logic (56% versus 41%).

General impression of the CFIA					
	Region				
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
CFIA is fair when inspecting food businesses					
Strongly agree (6-7)	52%	**60%**	47%	50%	56%
Somewhat agree (4-5)	21%	23%	22%	20%	22%
Do not agree (1-3)	8%	5%	5%	**13%**	6%
Don't know	18%	12%	**27%**	18%	16%
The CFIA inspections are conducted in a consistent manner					
Strongly agree (6-7)	48%	54%	48%	44%	49%
Somewhat agree (4-5)	19%	16%	21%	20%	17%
Do not agree (1-3)	11%	**15%**	5%	**12%**	**13%**
Don't know	22%	15%	**26%**	**24%**	22%
CFIA inspections follow rigorous logic					
Strongly agree (6-7)	47%	46%	**56%**	41%	47%
Somewhat agree (4-5)	24%	**25%**	14%	**26%**	**27%**
Do not agree (1-3)	10%	11%	6%	**12%**	9%
Don't know	20%	18%	24%	21%	17%
Information from the CFIA arrives in a timely manner					
Strongly agree (6-7)	44%	**52%**	40%	39%	**48%**
Somewhat agree (4-5)	26%	25%	28%	27%	24%
Do not agree (1-3)	13%	12%	14%	15%	10%
Don't know	17%	11%	19%	**19%**	17%
It is easy to understand the guidance the CFIA provides food businesses					
Strongly agree (6-7)	40%	39%	33%	**43%**	42%
Somewhat agree (4-5)	32%	36%	32%	31%	30%
Do not agree (1-3)	18%	15%	20%	16%	19%
Don't know	11%	10%	15%	10%	9%
The CFIA is not responsive when I ask regulatory questions					
Strongly agree (6-7)	15%	16%	19%	13%	12%
Somewhat agree (4-5)	18%	21%	17%	17%	19%
Do not agree (1-3)	44%	48%	40%	43%	47%
Don't know	23%	15%	24%	**27%**	22%
CFIA regulatory guidance is inconsistent					
Strongly agree (6-7)	14%	15%	13%	16%	12%
Somewhat agree (4-5)	21%	**27%**	21%	17%	22%
Do not agree (1-3)	47%	43%	46%	46%	50%
Don't know	19%	14%	21%	21%	16%

B7: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: All Respondents, n=1,081.

Qualitative findings:

Many participants agreed Canada has very high standards in food regulation and that the CFIA plays an important role to get the country to this level. Some participants who import or export food based their comments on their observation and comparisons with other countries' standards. A few mentioned that Canada's reputation internationally for food quality is very high.

When asked about their perception of the CFIA, most large businesses said they see the CFIA as the agency that ensures the food produced in Canada is of excellent quality and safe for consumption. They felt the CFIA was doing a very good job at ensuring safe food is produced and available in Canada, and that the inspections were done as regularly as they should be, according to the nature and risk-level of their business. The regulatory guidance provided by the CFIA was also perceived of good value, especially if they had a contact already within the CFIA that could be contacted right away or who could point them in the right direction to get the information needed.

On the other hand, many small businesses perceived the CFIA simply as a regulator and wished they could get more support from the CFIA to be able to comply with the regulations. Frequency of audits/inspections depended on the risk level of the food their business managed, and for some, infrequent or a complete lack of inspections suggested a lack of attention to their business.

Another issue pertained to inspectors. While larger businesses seemed to have the same inspector or team of inspectors in regular contact and doing frequent visits to their business, small businesses expressed they had a different inspector every time the CFIA visited their business. Participants from small businesses noticed some inspectors performed their inspection with the lens of a large business operation, and therefore the interpretation of regulations did not apply. The level of knowledge perceived from inspectors varied as well, and some participants felt they had to educate the inspectors on how their type of business operated, which seemed rather unproductive. A few perceived the inspectors' attitude as threatening, and others described them as too strict on what they consider vague regulations. The inconsistency on the preparation of inspectors has caused a lot of frustration among small businesses, deteriorating any positive impression they could have of the CFIA.

Many participants highlighted the importance of improving the communication and relationship with inspectors. Many smaller businesses expressed there was a lack of empathy from inspectors. Furthermore, having new ones every time an inspection happens hindered communication in general and their ability to develop a harmonious and proactive relationship focused on working towards the same goals. In fact, some would like to have some sort of contact with an inspector just so that they could validate their quality control processes and get clarification on questions and issues they may have. Participants recognized that their line of business was low risk and they also understood that higher risk businesses deserve more attention from inspectors, but that said, just because they are low risk, it does not mean they are not concerned with the quality of the food they manage and that they do not have quality control questions worthy of the CFIA's attention.

Overall, participants would like to see the role of the CFIA to be more of a partner or mentor, rather than an external auditor, to be able to work together towards the same goal of food safety. This sentiment was more prominent among small businesses; however, a few large businesses shared this opinion as well.

Impact of COVID-19 pandemic

A new set of questions was asked to Canadian food businesses to gauge the impact of the COVID-19 pandemic on a variety of points of interest, including the ability to meet food safety regulations and the effects on business operations.

Respondents were asked to specify the level of impact the COVID-19 pandemic has had on business operations. Nearly a quarter of respondents (23%) described a positive or mostly positive impact on business operations, while 48% felt that business operations were negatively impacted, and 29% felt that their business was operating as usual with no effect.

Impact of COVID-19 pandemic	
Positive, or mostly positive	23%
Negative, or mostly negative	48%
No effect or neutral effect	29%
Don’t know / Refuse	1%

C1. Would you say that the impact of the COVID-19 pandemic on your business operations has been... Base: All Respondents, n=1,081.

Wholesaler or distributors were the most likely to say the pandemic impact has been negative or mostly negative (55%), compared to businesses in processing or manufacturing (43%) or agriculture (42%). Retailers were more likely to describe a positive impact on their business operations (31%) when compared to wholesalers or distributors (22%), as well as those working in agriculture (17%). Agriculture businesses (40%) and processor or manufacturers (32%) were more likely to feel the pandemic has had no effect when compared to wholesalers or distributors (23%) and retailers (17%). No differences were observed based on company size.

Impact of COVID-19 pandemic									
		Industry sector				**Company size**			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Positive, or mostly positive	23%	17%	23%	22%	**31%**	22%	26%	22%	20%

Negative, or mostly negative	48%	42%	43%	**55%**	51%	47%	47%	49%	48%
No effect or neutral effect	29%	**40%**	**32%**	23%	17%	30%	26%	29%	31%
Don't know / Refuse	1%	1%	1%	1%	1%	1%	1%	1%	1%

C1. Would you say that the impact of the COVID-19 pandemic on your business operations has been... Base: All Respondents, n=1,081.

Businesses operating in Quebec (30%) and Western Canada (25%) were more likely to believe that the COVID-19 pandemic had a mostly positive impact on their business operations, compared to Ontario (19%) and Atlantic Canada businesses (15%).

Impact of COVID-19 pandemic					
		Region			
	Total (n=1,081)	**Atlantic (n=139)**	**Quebec (n=230)**	**Ontario (n=371)**	**West (n=341)**
Positive, or mostly positive	23%	15%	**30%**	19%	**25%**
Negative, or mostly negative	48%	51%	40%	50%	48%
No effect or neutral effect	29%	33%	29%	29%	26%
Don't know / Refuse	1%	1%	1%	1%	<1%

C1. Would you say that the impact of the COVID-19 pandemic on your business operations has been... Base: All Respondents, n=1,081.

Qualitative findings:

When businesses were asked about the impact the COVID-19 pandemic had on their business ability to comply with food regulations, unanimously businesses confirmed there was very little impact. There was some impact seen on general operations given the explicit request to respect public health guidelines, such as distancing of workers. However, many sanitary measures were already taking place (that is washing hands, wearing masks, disinfecting areas) therefore the sanitary guidelines brought on by the pandemic were not very impactful.

The impact of the pandemic for food businesses was more likely to be seen on revenues. A few businesses mentioned having a reduced client base given that they sold food products to restaurants, and many of these had to shut down for a period of time. Another example of an impact on revenue was the cases where businesses had to close their plant due to a COVID-19 outbreak, or because their business was considered non-essential.

Roughly 1 in 5 (18%) of businesses were forced to close at least a few days, while 82% did not have to shut down for any period of time throughout the pandemic.

Business shut down due to COVID-19

Yes	18%
No	82%
Don’t know / Not sure	-

C2: Did your business have to shut down at all due to COVID? Base: All Respondents, n=1,081.

Retail as well as processing and manufacturing businesses were the most likely to have closed during the pandemic (26% and 21% respectively). Those in agriculture were the most likely to have remained open (90%), followed by wholesalers or distributors (84%). The smaller the size of the business the more likely the business had to shut down at some point during the pandemic, with totals ranging from 26% among micro businesses to 12% for large businesses. No trends were observed among regions across Canada.

Business shut down due to COVID-19									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Yes	18%	10%	**21%**	16%	**26%**	**26%**	16%	13%	12%
No	82%	**90%**	79%	**84%**	74%	73%	**84%**	**86%**	**88%**
Don’t know	<1%	<1%	<1%	1%	-	<1%	<1%	<1%	<1%

C2: Did your business have to shut down at all due to COVID? Base: All Respondents, n=1,081.

Business shut down due to COVID-19					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Yes	18%	20%	18%	18%	16%
No	82%	79%	81%	82%	84%
Don’t know	<1%	1%	1%	-	<1%

C2: Did your business have to shut down at all due to COVID? Base: All Respondents, n=1,081.

Among businesses that closed during the COVID-19 pandemic, 38% closed for a few months, 35% closed for a few weeks, and 12% for a few days. 1 in 10 businesses (10%) that closed during the pandemic remain closed but plan to reopen, while an additional 5% were not certain if or when they will be able to reopen. Subgroup results from businesses that shut down have very small sample sizes and potential statistical differences were not highlighted for these questions so as to avoid implying or indicating significance that does not exist.

Length of business shut down	
For a few days	12%
For a few weeks	35%
For a few months	38%
You are still closed, but plan to reopen once COVID is over or once you are allowed to re open	10%
You are still closed, and you are not certain if or when you'll be able to reopen	5%

C3: For how long did you need to shut down? Was it… Base: Businesses shut down due to COVID-19, n=189.

Among businesses that were forced to close but have since reopened amidst the pandemic, more than half (54%) have reopened with reduced hours of operation compared to the hours worked before March of 2020, 40% have reopened with the same hours of operation, while 6% were operating with longer hours than before the pandemic.

Change in hours of operation among reopened businesses	
Longer	6%
The same	40%
Shorter	54%
Don't know/Not sure	1%

C4. Compared to before COVID-19 arrived in March 2020, are your hours of operation the same, longer or shorter? Base: Businesses who have reopened after closing due to COVID-19, n=164.

Businesses shut down during the COVID-19 pandemic were asked to specify the reason business operations were halted. Nearly one third of these businesses (32%) did so to be able to put in place safety precautions, while 29% closed as they were considered non-essential. A reduction in sales forced 27% of businesses to shut down, while 15% chose to shut down in order to protect both staff and the general public.

Less common reasons tended to be industry specific, with examples relating to farmers markets, complications with suppliers and impacts of border closures. Other reasons included COVID-19 cases at the business, and other unspecified pandemic reasons.

Reason for business shut down	
Shut down to be able to put in place safety precautions	32%
Were considered non-essential	29%
Sales slowed down	27%
As a general precaution / to protect staff and the public	15%
Industry closure (for example farmers markets, suppliers border closures)	11%
COVID-19 cases at our business	7%
COVID-19 pandemic (unspecified)	3%
Other	4%
Don't know / Refuse	1%

C5: Why did your business shut down? Base: Businesses shut down due to COVID-19, n=189.

Roughly half of businesses (53%) reported experiencing moderate changes to business operations surrounding the COVID-19 pandemic, while 26% described the level of change to business operations as large, and 21% as minimal.

Level of change to business operations	
Large changes	26%
Moderate changes	53%
Minimal changes	21%
Don't know	-

C6: In thinking of how the COVID-19 pandemic has affected the way your business operates currently, which of the following most closely describes how your business has been affected? Would you say… Base: All Respondents, n=1,081.

Retailers were the most likely to describe experiencing large changes to business operations (37%) when compared to all other industry sectors. The larger the size of the business, the more likely the changes were large, as micro businesses were the most likely to report minimal changes (33%), and small (58%) and medium (60%) businesses the most likely to report moderate changes, and large businesses the most likely to report large changes (41%).

Ethnic retailers were more likely to say they had to make large changes to their business operations, compared to non-ethnic retailers (47% versus 27%).

Level of change to business operations									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Large changes	26%	21%	27%	20%	**37%**	25%	23%	26%	**41%**
Moderate changes	53%	47%	53%	57%	55%	41%	**58%**	**60%**	49%
Minimal changes	21%	**30%**	**20%**	**22%**	7%	**33%**	19%	13%	10%
Don't know	<1%	1%	<1%	-	1%	1%	<1%	<1%	-

C6: In thinking of how the COVID-19 pandemic has affected the way your business operates currently, which of the following most closely describes how your business has been affected? Would you say… Base: All Respondents, n=1,081.

When comparing regions, businesses in Quebec were the most likely to experience large changes (36%), and the least likely to experience moderate changes (43%).

Level of change to business operations					
		Region			
	Total (n=1,081)	**Atlantic (n=139)**	**Quebec (n=230)**	**Ontario (n=371)**	**West (n=341)**
Large changes	26%	21%	**36%**	26%	20%
Moderate changes	53%	**56%**	43%	**54%**	**58%**
Minimal changes	21%	23%	21%	19%	21%
Don't know	<1%	1%	<1%	1%	<1%

C6: In thinking of how the COVID-19 pandemic has affected the way your business operates currently, which of the following most closely describes how your business has been affected? Would you say… Base: All Respondents, n=1,081.

Respondents were asked to rate a series of statements surrounding their ability to meet food safety regulations during the COVID-19 pandemic, using a scale of 1 to 7, where 1 meant “do not agree at all” and 7 meant “strongly agree”.

Over one third (35%) strongly agreed (scores of 6 or 7) that the CFIA provided clear guidance for rules and regulations, and 34% strongly agreed the CFIA has been flexible in the enforcement of regulations during COVID-19. For both of these statements, at least 1 in 5 businesses were not in a position to provide an answer (21% and 28% indicated “Don’t know”). 1 in 5 respondents (20%) strongly agree that they were struggling to adapt to safety practices due to the pandemic, and 12% strongly agreed that COVID-19 has made it difficult for them to comply with food safety regulations.

Meeting food safety regulations during COVID-19

	Strongly agree (6-7)	Somewhat agree (4-5)	Do not agree (1-3)	Don’t know
The CFIA has provided clear guidance on how they will be approaching compliance and enforcement of food rules and regulations during COVID-19	35%	26%	19%	21%
The CFIA has been flexible in the enforcement of regulations to allow businesses to adapt to the challenges of COVID-19	34%	27%	11%	28%
We are struggling in adapting to the new reality of safety practices due to the COVID-19 pandemic	20%	21%	57%	2%
COVID-19 has made it difficult for us to comply with food safety regulations	12%	15%	68%	5%

C7: On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, how would you rate the following statements? Base: All Respondents, n=1,081.

When comparing results by industry vertical, wholesalers or distributors (41%), and processors or manufacturers (39%) were more likely to strongly agree that the CFIA has provided clear guidance on compliance and enforcement during the pandemic, compared to businesses in agriculture (26%) and retail (33%). Processors and manufacturers were also more likely to strongly agree the CFIA has been flexible in the enforcement of regulations (39%), compared to businesses in agriculture (27%).

The larger the size of the business the more likely they were to strongly agree that the CFIA has provided clear guidance and have been flexible in the enforcement of regulations.

Meeting food safety regulations during COVID-19									
		Industry vertical				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler / Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
The CFIA has provided clear guidance on how they will be approaching compliance and enforcement of food rules and regulations during COVID-19									
Strongly agree (6-7)	35%	26%	**39%**	**41%**	33%	27%	**36%**	**39%**	**44%**
Somewhat agree (4-5)	26%	29%	26%	22%	26%	24%	26%	26%	29%
Do not agree (1-3)	19%	22%	18%	17%	17%	21%	16%	18%	19%
Don't know	21%	23%	17%	20%	23%	**28%**	**23%**	**16%**	7%
The CFIA has been flexible in the enforcement of regulations to allow businesses to adapt to the challenges of COVID-19.									
Strongly agree (6-7)	34%	27%	**39%**	36%	34%	28%	35%	**36%**	**50%**
Somewhat agree (4-5)	27%	29%	27%	27%	26%	26%	24%	31%	22%
Do not agree (1-3)	11%	12%	9%	11%	11%	13%	8%	10%	12%
Don't know	28%	32%	26%	26%	29%	**33%**	**33%**	23%	16%
We are struggling in adapting to the new reality of safety practices due to the COVID-19 pandemic.									
Strongly agree (6-7)	20%	21%	14%	22%	**25%**	**24%**	**22%**	15%	24%
Somewhat agree (4-5)	21%	24%	17%	18%	23%	22%	18%	22%	14%
Do not agree (1-3)	57%	52%	**67%**	58%	50%	50%	58%	**61%**	62%
Don't know	2%	2%	2%	2%	3%	4%	2%	1%	-
COVID-19 has made it difficult for us to comply with food safety regulations.									
Strongly agree (6-7)	12%	12%	13%	16%	9%	14%	13%	10%	16%
Somewhat agree (4-5)	15%	**18%**	9%	**16%**	**18%**	15%	12%	18%	11%
Do not agree (1-3)	68%	64%	**76%**	62%	69%	63%	70%	70%	71%
Don't know	5%	**6%**	2%	6%	4%	**8%**	4%	2%	1%

C7: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", how would you rate the following statements? Base: All Respondents, n=1,081.

When comparing regions, businesses in Atlantic Canada (45%) and Western Canada (36%) were more likely to strongly agree that the CFIA has been flexible in the enforcement of regulations to allow businesses to adapt to the challenges of the pandemic, compared to businesses in Quebec (26%) and Ontario (33%).

A quarter of businesses operating in Ontario (25%) strongly agreed that they are struggling in adapting to the new reality of safety practices due to the COVID-19 pandemic, which is significantly higher compared to businesses in Quebec (17%), and Western Canada (16%).

Businesses operating in Western Canada (72%) and Ontario (70%) were more likely to disagree that COVID-19 has made it difficult to comply with food safety regulations.

Meeting food safety regulations during COVID-19					
	Region				
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
The CFIA has provided clear guidance on how they will be approaching compliance and enforcement of food rules and regulations during COVID-19					
Strongly agree (6-7)	35%	35%	32%	34%	37%
Somewhat agree (4-5)	26%	28%	23%	26%	26%
Do not agree (1-3)	19%	18%	17%	21%	18%
Don't know	21%	19%	**27%**	20%	18%
The CFIA has been flexible in the enforcement of regulations to allow businesses to adapt to the challenges of COVID-19					
Strongly agree (6-7)	34%	**45%**	26%	33%	**36%**
Somewhat agree (4-5)	27%	21%	28%	27%	29%
Do not agree (1-3)	11%	7%	14%	10%	11%
Don't know	28%	27%	31%	30%	24%
We are struggling in adapting to the new reality of safety practices due to the COVID-19 pandemic.					
Strongly agree (6-7)	20%	21%	17%	**25%**	16%
Somewhat agree (4-5)	21%	24%	17%	22%	21%
Do not agree (1-3)	57%	53%	**63%**	51%	**62%**
Don't know	2%	2%	3%	2%	2%
COVID-19 has made it difficult for us to comply with food safety regulations.					
Strongly agree (6-7)	12%	14%	14%	10%	14%
Somewhat agree (4-5)	15%	20%	16%	15%	13%
Do not agree (1-3)	68%	59%	64%	**70%**	**72%**
Don't know	5%	**8%**	5%	**5%**	2%

C7: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", how would you rate the following statements? Base: All Respondents, n=1,081.

Contact with the CFIA

Based on results from 2021, 70% of businesses have had some sort of contact with the CFIA over the past 12 months. The most common interaction with the CFIA over the past 12 months had been to look for information about food safety regulations or requirements on the CFIA's website (47%). The next most common was requesting a permission, licence registration or certificate (30%), followed by having been inspected (28%), contacting CFIA for information on (rather than requesting) a permission, licence or certificate (26%), contacting the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation (25%), and finally, initiating a product recall either voluntarily or ordered (12%).

These results were generally quite similar to those observed in the previous waves, although there were more businesses that have requested permission licences or regulator interpretation, as well as fewer reporting being inspected within the past 12 months.

Reasons for having contact with the CFIA			
	2021 (n=1,081)	2020 (n=400)	2019 (n=700)
Looked for information about food safety regulations or requirements on the CFIA's website	47%	43%	39%
Requested a permission, licence, registration, or certificate from the CFIA	30%	22%	21%
Have been inspected by the CFIA within the past 12 months	28%	41%	39%
Contacted the CFIA for information [not requesting] on a permission, licence or certificate	26%	21%	21%
Contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, not including permissions, licences, registrations or certifications	25%	26%	22%
Initiated a product recall either voluntary or ordered	12%	26%	16%
Have not looked for information from or had any personal contact with the CFIA over the last 12 months	30%	29%	6%
Don't know/ Refused	5%	2%	2%

D1: I'm now going to ask you about any contact you have had with the CFIA in the last year. Please tell me which activities apply to you or your business over the last 12 months. Base: All Respondents, 2021, n=1,081; 2020, n=400; 2019, 700.

Most of these activities or types of contact with the CFIA were more common among businesses in the processor and manufacturer segment and many were also more common among those in the wholesaler and distributor segment. Businesses in the agriculture segment (44%) and retailers (41%) were the most likely to not have contacted the CFIA. Results also show that product recalls were more common among businesses in the wholesale/distributor segment (23%).

As well, the larger the company, the more likely they were to have contacted the CFIA. Only 10% of large business had reported no form of contact with the CFIA compared to 43% among micro sized businesses.

Contact with the CFIA									
		Industry sector				**Company size**			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Looked for information about food safety regulations or requirements on the CFIA's website	47%	29%	**70%**	**53%**	34%	33%	**43%**	**58%**	**70%**
Requested a permission, licence, registration, or certificate from the CFIA	30%	**21%**	**50%**	**39%**	7%	18%	23%	**40%**	**60%**
Have been inspected by the CFIA within the past 12 months	28%	24%	**36%**	27%	21%	14%	**25%**	**37%**	**46%**
Contacted the CFIA for information [not requesting] on a permission, licence or certificate	26%	**18%**	**40%**	**34%**	8%	15%	22%	**31%**	**56%**
Contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, not including permissions, licences, registrations or certifications	25%	16%	**41%**	**28%**	12%	13%	**23%**	**31%**	**55%**
Initiated a product recall either voluntary or ordered	12%	6%	9%	**23%**	10%	6%	**14%**	**13%**	**22%**
Have not looked for information from or had any personal contact with the CFIA over the last 12 months	30%	**44%**	17%	21%	**41%**	**43%**	**36%**	**20%**	10%
Don't know/ Refused	5%	5%	3%	5%	**8%**	5%	5%	4%	6%

D1: I'm now going to ask you about any contact you have had with the CFIA in the last year. Please tell me which activities apply to you or your business over the last 12 months. Base: All Respondents, n=1,081.

From a regional perspective, businesses in Western Canada were more likely to have looked for information about food safety regulations or requirements on the CFIA's website, compared to businesses in Quebec (53% versus 40%). Those operating in Atlantic Canada reported noticeably higher levels of contact across all other categories, with the exception of product recalls. In particular, the incidence of inspections was half of all businesses in Atlantic Canada, compared to 12% in Quebec.

Contact with the CFIA					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Looked for information about food safety regulations or requirements on the CFIA's website	47%	47%	40%	47%	**53%**
Requested a permission, licence, registration, or certificate from the CFIA	30%	**41%**	30%	26%	31%
Have been inspected by the CFIA within the past 12 months	28%	**50%**	12%	**26%**	**32%**
Contacted the CFIA for information [not requesting] on a permission, licence or certificate	26%	**37%**	18%	24%	**29%**
Contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, not including permissions, licences, registrations or certifications	25%	**40%**	16%	**26%**	**25%**
Initiated a product recall either voluntary or ordered	12%	15%	11%	12%	10%
Have not looked for information from or had any personal contact with the CFIA over the last 12 months	30%	21%	**44%**	**31%**	24%
Don't know/ Refused	5%	4%	4%	5%	6%

D1: I'm now going to ask you about any contact you have had with the CFIA in the last year. Please tell me which activities apply to you or your business over the last 12 months. Base: All Respondents, n=1,081.

Additional analysis does in fact reveal that businesses that were inspected over the past 12 months were significantly more likely to have undertaken the other activities, as seen in the table below. This seems to suggest that the likelihood of contacting the CFIA is in large part determined by whether or not a company gets inspected. This result was similarly observed in previous research waves.

Contact with the CFIA		
	Was inspected by the CFIA within the past 12 months	
	Yes (n=297)	No (n=784)
Looked for information about food safety regulations or requirements on the CFIA's website	**69%**	39%
Requested a permission, licence, registration, or certificate from the CFIA	**52%**	22%
Contacted the CFIA for information [not requesting] on a permission, licence or certificate	**48%**	17%
Contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, not including permissions, licences, registrations or certifications	**48%**	16%
Initiated a product recall either voluntary or ordered	**18%**	9%
Don't know/ Refused	-	7%

D1: I'm now going to ask you about any contact you have had with the CFIA in the last year. Please tell me which activities apply to you or your business over the last 12 months. Base: All Respondents, n=1,081.

Businesses having contacted the CFIA over the past 12 months most often did so through the CFIA website (57%), by contacting the CFIA by email (40%), or by phone (38%). A smaller proportion contacted the CFIA in person (7%), much lower than in recent years, likely due to the constraints of the pandemic. Only a few accessed or requested information via social media (2%). These results suggest that businesses in general were using multiple channels to contact the CFIA. The preference order of ways to contact the CFIA remained similar from across recent research waves, although the proportion of those using email has overtaken contact over the phone.

Retailers were the most likely to contact the CFIA via the website whereas processors and manufacturers were more likely to use email or over the telephone. Wholesalers or distributors were most likely to contact the CFIA in person. Large companies were also more likely to contact the CFIA using email, as well as over the phone.

How information from the CFIA was requested

	2021 (n=594)	2020 (n=195)	2019 (n=409)
On the CFIA website	57%	51%	60%
Email	40%	37%	43%
Over the phone	38%	39%	47%
In person	7%	21%	19%
Social media	2%	1%	2%
Webinar	≤1%	-	8%
Other	2%	5%	3%
Don't know/ Refused	2%	-	≤1%

D2: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it? … Base: Businesses that had an interaction with CFIA, 2021, n=594; CFIA,2020, n=195; 2019, n=409

How information from the CFIA was accessed or requested									
		Industry sector				**Company size**			
	Total (n=594)	**Agriculture (n=134)**	**Processor/ Manufacturer (n=219)**	**Wholesaler/ Distributor (n=146)**	**Retailer (n=90)**	**Micro (n=134)**	**Small (n=129)**	**Medium (n=266)**	**Large (n=62)**
On the CFIA website	57%	53%	51%	60%	**72%**	60%	56%	57%	47%
Email	40%	**37%**	**47%**	**45%**	20%	29%	41%	41%	**62%**
Over the phone	38%	35%	**43%**	39%	27%	40%	34%	36%	**53%**
In person	7%	7%	**7%**	**9%**	1%	7%	6%	6%	9%
Social media	2%	0%	1%	2%	4%	1%	3%	2%	1%
Webinar	<1%	-	-	1%	-	-	-	-	3%
Other	2%	3%	1%	1%	6%	0%	2%	3%	3%
Don't know/ Refused	2%	1%	1%	3%	4%	4%	1%	1%	-

D2: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it? … Base: Businesses that had an interaction with CFIA, n=594.

Regionally, contact over the phone was more likely to happen in Atlantic Canada compared to other regions. All other regions were more likely to use the CFIA website as a means of contact when compared to businesses in Atlantic Canada.

How information from the CFIA was accessed or requested					
		Region			
	Total (n=594)	Atlantic (n=84)	Quebec (n=110)	Ontario (n=208)	West (n=192)
On the CFIA website	57%	36%	**70%**	**62%**	**52%**
Email	40%	45%	39%	35%	44%
Over the phone	38%	**55%**	34%	37%	36%
In person	7%	10%	11%	6%	4%
Social media	2%	1%	-	3%	2%
Webinar	<1%	-	-	1%	-
Other	2%	1%	4%	2%	1%
Don't know/ Refused	2%	-	2%	3%	2%

D2: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it? … Base: Businesses that had an interaction with CFIA, n=594.

Nearly 3 in 5 respondents (59%) were very satisfied with the overall service received from the CFIA in the past 12 months. Another 31% were somewhat satisfied, and 8% were not very satisfied. Results returned to similar levels observed in 2019.

Overall service from the CFIA (past 12 months)			
	2021 (n=594)	2020 (n=195)	2019 (n=409)
Very satisfied (6-7)	59%	74%	59%
Somewhat satisfied (4-5)	31%	22%	32%
Not very satisfied (1-3)	8%	4%	5%
Don't know	3%	-	5%

D3: How would you rate your general satisfaction with the overall service received from the CFIA in the last 12 months using a scale from 1-7, where 1 is not at all satisfied and 7 is very satisfied? Base: Businesses that had an interaction with CFIA, 2021, n=594; 2020, n=195; 2019, n=409.

Wholesalers or distributors were the most likely to report being not very satisfied (13%), particularly when compared to retailers (3%). Otherwise, satisfaction ratings were relatively consistent across industry sectors, company size segments, and regions.

Overall service from the CFIA (past 12 months)									
		Industry sector				**Company size**			
	Total (n=594)	Agriculture (n=134)	Processor/ Manufacturer (n=219)	Wholesaler/ Distributor (n=146)	Retailer (n=90)	Micro (n=134)	Small (n=129)	Medium (n=266)	Large (n=62)
Very satisfied (6-7)	59%	61%	64%	55%	50%	49%	61%	61%	65%
Somewhat satisfied (4-5)	31%	30%	28%	30%	41%	33%	33%	30%	29%
Not very satisfied (1-3)	8%	5%	7%	**13%**	3%	14%	5%	6%	5%
Don't know	3%	4%	1%	2%	6%	4%	2%	3%	-

D3: How would you rate your general satisfaction with the overall service received from the CFIA in the last 12 months using a scale from 1-7, where 1 is not at all satisfied and 7 is very satisfied? Base: Businesses that had an interaction with CFIA, n=594.

Overall service from the CFIA (past 12 months)					
		Region			
	Total (n=594)	Atlantic (n=84)	Quebec (n=110)	Ontario (n=208)	West (n=192)
Very satisfied (6-7)	59%	66%	53%	61%	56%
Somewhat satisfied (4-5)	31%	24%	33%	29%	35%
Not very satisfied (1-3)	8%	9%	10%	8%	6%
Don't know	3%	1%	4%	2%	3%

D3: How would you rate your general satisfaction with the overall service received from the CFIA in the last 12 months using a scale from 1-7, where 1 is not at all satisfied and 7 is very satisfied? Base: Businesses that had an interaction with CFIA, n=594.

Satisfaction ratings were also analyzed based on whether or not a business had been inspected by the CFIA over the past 12 months. Results show that satisfaction ratings increased among those who have been inspected. Fully 70% of these businesses were very satisfied and another 24% were somewhat satisfied. Among those who have not been inspected, 51% were very satisfied and 36% were somewhat satisfied.

Overall service from the CFIA (past 12 months)			
		Inspected by CFIA	
	Total (n=594)	Have been (n=236)	Have not been (n=358)
Very satisfied (6-7)	59%	**70%**	51%
Somewhat satisfied (4-5)	31%	24%	**36%**
Not very satisfied (1-3)	8%	6%	9%
Don't know	2%	0%	**4%**

D3: How would you rate your general satisfaction with the overall service received from the CFIA in the last 12 months using a scale from 1-7, where 1 is not at all satisfied and 7 is very satisfied? Base: Businesses that had an interaction with CFIA, n=594.

Respondents were asked to expand on their satisfaction rating. Results in the following grid have been presented based on respondent satisfaction segments. Those who indicated "don't know" when asked to rate their satisfaction with the CFIA were not included in this analysis.

The responsiveness of service, quality of customer service, and high quality of information provided by the CFIA all seem to be key satisfaction drivers. Among those "very satisfied", 35% provided this rating because the service was seen as responsive, another 35% felt the CFIA was helpful and provides good customer service, and 32% because of the high-quality information the CFIA provided. In addition, 22% of these respondents have had no problems or issues with the CFIA's service that would otherwise lead them to provide a lower rating.

Among those who were "somewhat satisfied", 31% of respondents indicated they require more information and have not heard from the CFIA. Room for improvement was a general reason for somewhat satisfied ratings. The quality of the customer service was also a factor, with some indicating it was positive and others indicating the service was poor.

Finally, those the least satisfied especially argue for more information from the CFIA, better customer service, and that it was difficult to keep up with regulations and processes.

Reasons for ratings					
Among businesses very satisfied with CFIA (Satisfaction rating of 6 OR 7)		Among businesses somewhat satisfied with CFIA (Satisfaction rating of 4 or 5)		Among businesses not vey satisfied with CFIA (Satisfaction rating of 1 to 3)	
	n=349		n=184		n=47
Responsive service	35%	Require more information / haven't heard from them	31%	Require more information / haven't heard from them	49%
Helpful / good customer service	35%	Unhelpful / poor customer service	17%	Unhelpful / poor customer service	46%
High quality of information provided	32%	Room for improvement (general)	15%	Difficult to keep up with regulations / process	18%
No problems / no issues	22%	No problems / no issues	15%	Room for improvement (general)	10%
User-friendly website	10%	High quality of information provided	13%	No problems / no issues	9%
Room for improvement (general)	7%	Responsive service	11%	Room for improvement - website	9%
Require more information / haven't heard from them	6%	Helpful / good customer service	11%	High quality of information provided	6%
Room for improvement - website	3%	Difficult to keep up with regulations / process	10%	Responsive service	3%
Unhelpful / poor customer service	2%	Room for improvement - website	9%	User-friendly website	3%
Difficult to keep up with regulations / process	2%	User-friendly website	4%	Helpful / good customer service	2%
Other	1%	Other	4%	Other	7%
Don't know/ Refused	3%	Don't know/ Refused	8%	Don't know/ Refused	-

D4: Please expand on why you provided that score. Base: Businesses that provided a valid satisfaction rating, n=580.

My CFIA

The survey also examined awareness and likelihood to use the digital service developed for convenient service delivery, My CFIA. Based on the most recent wave of surveys, nearly 2 in 5 businesses (39%) were aware of the My CFIA portal, with 27% having used it. Those in the retailer sector as well as micro or small companies were the least likely to have heard about the portal.

Regionally, awareness was the lowest in Quebec (31%) while awareness in the other 3 regions ranged between 37% in Ontario and 48% in Atlantic Canada. Both awareness and usage have increased from results observed in previous waves. Awareness increased from 26% to 39%, and usage was up from 16% to 27% since 2020.

Awareness and usage of "My CFIA"			
	2021 (n=1,081)	2020 (n=400)	2019 (n=700)
Have heard of it (NET)	39%	26%	29%
Have heard and used it	27%	16%	18%
Have heard and never used it	13%	10%	10%
Have not heard of it	60%	72%	71%
Don't know / Refused	1%	2%	≤1%

E1: Have you ever heard, seen or read anything about the CFIA's online portal called "My CFIA?" Base: All Respondents, 2021, n=1,081; 2020, n=400; 2019, n=700.

Awareness and usage of "My CFIA"									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255	Medium (n=416)	Large (n=75)
Yes (NET)	39%	**31%**	**57%**	**50%**	16%	27%	31%	**48%**	**75%**
Yes, I used it	27%	**16%**	**46%**	**37%**	5%	16%	19%	**36%**	**56%**
Yes, but I never used it	13%	15%	11%	13%	10%	12%	12%	13%	19%
Not aware	60%	**67%**	43%	50%	**84%**	**72%**	**68%**	**51%**	25%
Don't know / Not sure	1%	2%	<1%	<1%	-	1%	1%	<1%	-

E1: Have you ever heard, seen or read anything about the CFIA's online portal called "My CFIA?" Base: All Respondents, n=1,081.

Awareness and usage of "My CFIA"					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Yes (NET)	39%	**48%**	31%	37%	**44%**
Yes, I used it	27%	**34%**	22%	24%	**30%**
Yes, but I never used it	13%	13%	10%	13%	14%
Not aware	60%	51%	**68%**	**63%**	55%
Don't know / Not sure	1%	1%	1%	<1%	<1%

E1: Have you ever heard, seen or read anything about the CFIA's online portal called "My CFIA?" Base: All Respondents, n=1,081.

Among the 27% of businesses that had used My CFIA, 70% did so to request a new licence, 55% to renew their licence, 44% to register their business, 32% to obtain a permit, and 23% to obtain an export certificate. Other activities done to a lesser extent included a general inquiry or to obtain information (7%), to change or update their business information (3%), or for import information (2%). A total of 4% had used My CFIA only to enroll without using any other portal features, down from 24% in 2020. Subgroup results had very small sample sizes and potential statistical differences were not highlighted for this question so as to avoid implying or indicating significance that does not exist.

Reasons for using portal

	2021 (n=274)	2020 (n=64)	2019 (n=187)
New licence request	70%	69%	65%
Licence renewal	55%	32%	32%
Registration	44%	45%	44%
Permit	32%	16%	28%
Export certificate	23%	24%	14%
General inquiry or information unspecified	7%	-	-
To change or update our information	3%	-	-
Import information	2%	-	-
Other purposes	1%	6%	10%
Only enrolled but have not used it	4%	24%	10%
Don’t know/Can’t remember/ refused	5%	7%	2%

E2: Have you ever used the portal for a… Base: Businesses that have used “My CFIA”, n=274; 2020, n=64; 2019, n=187.

Overall, satisfaction with the portal was positive, as half of users (50%) gave a satisfaction rating of 6 or 7 (on a 7-point scale), and 36% a rating of 4 or 5. Across recent waves, this year’s results showed the highest proportion of businesses “very satisfied”, likely due to the higher number of respondents who had enrolled and had the opportunity to experience the services that are now available.

Satisfaction with "My CFIA"			
	2021 (n=274)	2020 (n=64)	2019 (n=187)
Very satisfied (6-7)	50%	40%	47%
Somewhat satisfied (4-5)	36%	47%	36%
Not very satisfied (1-3)	12%	10%	14%
Don't know	1%	2%	2%

E3: Please rate your overall level of satisfaction with "My CFIA" on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied. Base: Businesses that have used "My CFIA", 2021, n=274; 2020, n=64; 2019, n=187

According to participants who provided a lower satisfaction score for My CFIA (136 businesses in total gave a satisfaction rating from 1 to 5) the most common reason was that the design was not user-friendly (64%). Other reasons provided included that the information was unclear (16%), and that the application process was difficult (13%). Survey participants who provided a higher satisfaction score (134 businesses in total gave a satisfaction rating of 6 or 7), appreciated the user-friendly design (44%), described it as straightforward (23%), found accurate information or the information they needed (18%), and found the platform accessible and with a responsive service (13%).

Reasons for "My CFIA" satisfaction rating			
		Satisfaction rating	
	Total (n=270)	Ratings 1 to 5 (n=136)	Ratings 6 or 7 (n=134)
Design is not user-friendly (general)	39%	**64%**	14%
Design is user-friendly / easy to use (general)	25%	6%	**44%**
Straightforward / no issues	14%	5%	**23%**
Information was unclear / inaccurate	12%	16%	9%
Found accurate information / what I was looking for	11%	6%	**16%**
Application process was difficult	9%	**13%**	4%
Accessible / responsive service	7%	2%	**13%**
Provided helpful service (general)	7%	4%	9%
Service was slow / not responsive	5%	**9%**	1%
Unhelpful service (general)	5%	7%	2%
Other	2%	1%	4%
Don't know/ Refused	7%	7%	6%

E4. Please expand on why you provide that rating. Base: Businesses that have used "My CFIA" and that provided a satisfaction rating, 2021, n=136.

Businesses that have not used My CFIA were asked to specify which licences or permissions their company had with the CFIA. Over a quarter of businesses (27%) had a Safe Food for Canadians Licence, 17% had another type of licence or certificate, and 11% had a food export certificate. Nearly 3 in 5 respondents who have not used My CFIA (59%) were not sure of which licences or permissions their business had from the CFIA.

In addition, ethnic retailers were more likely to say they had the Safe Food for Canadians Licence, compared to non-ethnic retailers (34% versus 18%).

Licences or permissions with the CFIA

	2021 (n=909)	2020 (n=331)
Safe Food for Canadians Licence	27%	31%
Another type of licence or certificate from the CFIA	17%	11%
A food export certificate	11%	7%
Don't know / Can't remember / Refused	59%	61%

E5: To the best of your knowledge which of the following licences or permissions does your company have from the CFIA? Base: Businesses who have not used My CFIA, 2021, n=909; 2020, n=331.

Qualitative findings:

Awareness of the My CFIA portal was high among all participants. The portal was well evaluated by participants. Most remember using it, mainly to process new licences, and found this tool made licence renewals easy and quick. A few felt the sign-up process could be streamlined and that the portal could be enhanced if they could use this tool to receive communications and updates from the CFIA.

Information needs from the CFIA

Nearly 1 in 3 businesses not exclusively in retail (36%) strongly agreed that the CFIA takes the needs of businesses into account when developing new information products, and a similar proportion (31%) strongly agreed that over the past 12 months they had spent less time searching for food safety information.

Information products		
The CFIA takes the needs of businesses into account when developing new regulatory information products		
	2021 (n=780)	2019 (n=500)
Strongly agree (6-7)	36%	29%
Somewhat agree (4-5)	30%	39%
Do not agree (1-3)	17%	19%
Don't search for this information	17%	13%
Don't know	-	-

Information products		
Over the past 12 months, I've needed to spend less time searching for food safety information I require		
	2021 (n=780)	2019 (n=500)
Strongly agree (6-7)	31%	26%
Somewhat agree (4-5)	32%	35%
Do not agree (1-3)	27%	28%
Don't search for this information	8%	9%
Don't know	-	-

E6: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree". Base: Businesses that are not only retailers, 2021, n=780; 2019, n=500

Businesses in the wholesaler or distributor sector (38%), as well as processors or manufacturers (40%) were more likely to strongly agree that the CFIA takes the needs of businesses into account when compared to businesses in agriculture (28%).

Information product

		Industry sector				Company size			
	Total (n=780)	Agriculture (n=262)	Processor/ Manufacturer (n=232)	Wholesaler/ Distributor (n=210)	Retailer (n=67)	Micro (n=227)	Small (n=181)	Medium (n=302)	Large (n=67)
CFIA takes the needs of businesses into account when developing new regulatory information products									
Strongly agree (6-7)	36%	28%	**38%**	**40%**	39%	27%	**40%**	**38%**	**46%**
Somewhat agree (4-5)	30%	33%	30%	30%	23%	25%	31%	32%	33%
Do not agree (1-3)	17%	21%	18%	14%	12%	**24%**	16%	14%	11%
Don't know	17%	19%	15%	15%	26%	**24%**	13%	16%	11%
Over the past 12 months, I've needed to spend less time searching for food safety information I require									
Strongly agree (6-7)	31%	26%	33%	31%	33%	29%	34%	31%	26%
Somewhat agree (4-5)	32%	32%	28%	35%	41%	24%	35%	**36%**	39%
Do not agree (1-3)	27%	26%	31%	25%	20%	**34%**	21%	24%	29%
I do not search for food safety information	8%	13%	5%	8%	5%	**13%**	8%	6%	5%
Don't know	2%	3%	2%	2%	1%	1%	2%	3%	-

E6: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree". Base: Businesses that are not only retailers, n=780.

There is a more noted trend when it comes to company size where results revealed a relatively higher proportion of large businesses strongly agreed the CFIA takes the needs of businesses into account (46%). These results were similar to those observed in previous waves.

Companies in Quebec (47%) were more likely to strongly agree that the CFIA takes the needs of businesses into account when developing new regulatory information products, compared to businesses in Ontario (33%) or Western Canada (32%).

Information product					
		Region			
	Total (n=780)	Atlantic (n=103)	Quebec (n=165)	Ontario (n=255)	West (n=257)
CFIA takes the needs of businesses into account when developing new regulatory information products					
Strongly agree (6-7)	36%	36%	**47%**	33%	32%
Somewhat agree (4-5)	30%	**36%**	17%	**32%**	**33%**
Do not agree (1-3)	17%	18%	21%	15%	17%
Don't know	17%	11%	15%	**20%**	18%
Over the past 12 months, I've needed to spend less time searching for food safety information I require					
Strongly agree (6-7)	31%	31%	35%	29%	29%
Somewhat agree (4-5)	32%	36%	27%	33%	34%
Do not agree (1-3)	27%	22%	29%	26%	27%
I do not search for food safety information	8%	9%	8%	9%	7%
Don't know	2%	1%	1%	2%	2%

E6: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree". Base: Businesses that are not only retailers, n=780.

Nearly 2 in 5 respondents (38%) indicate that they did not have any challenges when it comes to finding food safety information. The main challenges for businesses when it comes to finding food safety information were the lack of clear information (13%), the CFIA website not being easy to navigate (8%), as well as going through too much information (7%). Other common challenges included the time-consuming nature of researching information, and the lack of notifications, among others.

.**Biggest challenge in finding food safety information**			
	2021 (n=1,081)	2020 (n=400)	2019 (n=700)
Lack of clear information / difficult to understand	13%	9%	13%
Website is not user-friendly / difficult to navigate	8%	10%	8%
Too much information / high volume of information	7%	5%	8%
Research / finding information is too time-consuming	6%	4%	6%
Lack of notifications / updates	5%	1%	4%
Difficult to search for / find information (general)	3%	5%	2%
Difficult to find information specific to my industry	3%	1%	1%
Lack of contact with customer service / not responsive	2%	1%	3%
Difficult to find information on specific products	1%	2%	1%
Difficult to find import / export information	≤1%	-	≤1%
None / No challenges	38%	25%	46%
Other	1%	6%	1%
Don't know / Refused	38%	36%	5%

E7: In your opinion, what is the BIGGEST challenge in finding information on food safety regulations or requirements? Base: All Respondents, n=1,081; 2020, n=400; 2019, n=700.

When it comes to finding information on food safety regulations or requirements, results across industry sector were fairly similar. Retailers were the most likely to indicate they do not face any particular challenges looking for the information they need. Results were also fairly consistent across company size segments.

Biggest challenge in finding food safety information									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Lack of clear information / difficult to understand	13%	11%	17%	11%	12%	11%	11%	14%	19%
Website is not user-friendly / difficult to navigate	8%	**9%**	**10%**	**9%**	3%	10%	5%	8%	7%
Too much information / high volume of information	7%	9%	9%	6%	5%	5%	8%	9%	10%
Research / finding information is too time-consuming	6%	2%	**9%**	**8%**	**7%**	5%	8%	6%	5%
Lack of notifications / updates	5%	5%	6%	5%	2%	3%	5%	6%	2%
Difficult to search for / find information (general)	3%	4%	4%	4%	1%	2%	3%	4%	7%
Difficult to find information specific to my industry	3%	2%	3%	4%	2%	4%	2%	2%	1%
Lack of contact with customer service / not responsive	2%	2%	2%	2%	2%	3%	2%	2%	1%
Difficult to find information on specific products	1%	1%	1%	2%	-	1%	1%	1%	2%
Difficult to find import / export information	<1%	<1%	<1%	<1%	-	<1%	-	<1%	-
None / No challenges	38%	35%	31%	34%	**54%**	38%	39%	37%	43%
Other	2%	**4%**	2%	1%	<1%	**3%**	1%	2%	-
Don't Know/Refused	12%	**16%**	7%	**15%**	11%	**14%**	**16%**	**9%**	4%

E7: In your opinion, what is the BIGGEST challenge in finding information on food safety regulations or requirements? Base: All Respondents, n=1,081.

Regionally, businesses in Quebec were more likely to report that finding information is too time-consuming compared to all other regions (12% versus 4%). In addition, ethnic retailers were more likely to say that research and finding information is too time-consuming, compared to non-ethnic retailers (13% versus 3%).

Biggest challenge in finding food safety information					
		Region			
	Total (n=1,081)	Atlantic (n=189)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Lack of clear information / difficult to understand	13%	12%	12%	16%	11%
Website is not user-friendly / difficult to navigate	8%	**12%**	5%	9%	8%
Too much information / high volume of information	7%	9%	7%	7%	7%
Research / finding information is too time-consuming	6%	3%	**14%**	4%	4%
Lack of notifications / updates	5%	3%	5%	6%	3%
Difficult to search for / find information (general)	3%	2%	2%	3%	5%
Difficult to find information specific to my industry	3%	3%	1%	2%	**4%**
Lack of contact with customer service / not responsive	2%	1%	3%	2%	2%
Difficult to find information on specific products	1%	-	1%	1%	1%
Difficult to find import / export information	<1%	1%	-	<1%	<1%
None / No challenges	38%	35%	35%	37%	43%
Other	2%	**3%**	1%	2%	2%
Don't Know/Refused	12%	16%	14%	10%	10%

E7: In your opinion, what is the BIGGEST challenge in finding information on food safety regulations or requirements? Base: All Respondents, n=1,081.

When asked specifically to identify the topics for which information was difficult to find, nearly half (46%) of all respondents felt there was no topic in particular. Some topics identified included food safety topics in general (5%), labelling (5%) and food product information (4%).

Biggest challenge in finding food safety information	
Everything (general)	5%
Labeling	5%
Easier to find industry-specific details	4%
Food product (specified)	4%
New regulations / changes to rules	3%

Licensing	3%
Other	3%
None in particular	46%
Don’t know / Refused	16%

Additional topics for which information has been hard to find *Responses provided by about 1% to 2% of respondents			
COVID-19 regulations	2%	Product recalls	1%
Import information	2%	Traceability / record keeping requirements	1%
Basic sanitation and hygiene practices	2%	Pesticides / maximum residue limits	1%
Export information	1%	Dietary restrictions (incl. allergens)	<1%
Preventive control / identifying risk material	1%		

E8: What were some of the food safety **topics** for which you felt it was difficult to get clear information? Base: All Respondents, 2021, n=1,081.

Businesses in the processor or manufacturer sector were more likely to say it was difficult to find licensing (5%) and export information (3%) compared to agriculture businesses (1% and <1% respectively). Wholesalers or distributors were more likely to describe challenges regarding import information (7%) compared to other verticals (1%), and more likely than retailers to indicate labelling was a challenge (8% versus 2%).

Medium-sized businesses were more likely to say labeling information, new regulations or changes to rules, and general food product information were difficult to find, compared to micro or small companies. Smaller businesses were the most likely to say they do not know of any topics that were difficult to find.

Topics for which information has been hard to find									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Everything (general)	5%	5%	5%	6%	5%	4%	5%	5%	12%
Labeling	5%	4%	5%	**8%**	2%	3%	4%	**7%**	5%
Easier to find industry-specific details	4%	3%	6%	5%	3%	6%	3%	4%	4%
Food product (specified)	4%	4%	5%	4%	3%	5%	2%	**5%**	1%
New regulations / changes to rules	3%	3%	5%	2%	3%	2%	1%	**6%**	2%
Licensing	3%	1%	**5%**	3%	2%	4%	3%	3%	-
Import information	2%	1%	1%	**7%**	1%	2%	1%	3%	5%
COVID-19 regulations	2%	2%	2%	2%	4%	2%	3%	2%	2%
Basic sanitation and hygiene practices	2%	2%	2%	1%	2%	1%	3%	1%	6%
Export information	1%	<1%	**3%**	1%	-	1%	<1%	1%	5%
Preventive control / identifying risk material	1%	-	2%	<1%	-	-	1%	<1%	4%
Product recalls	1%	1%	-	1%	1%	1%	1%	1%	-
Traceability / record keeping requirements	1%	<1%	2%	-	-	-	1%	1%	-
Pesticides / maximum residue limits	1%	2%	-	-	1%	1%	1%	<1%	2%
Dietary restrictions (incl. allergens)	<1%	<1%	1%	1%	-	<1%	1%	-	3%
Other	3%	4%	4%	2%	3%	3%	2%	3%	6%
N1 in particular	46%	**55%**	36%	38%	**56%**	50%	49%	42%	38%
Don't know / Refused	16%	14%	14%	20%	15%	**16%**	**19%**	**16%**	4%

E8: What were some of the food safety **topics** for which you felt it was difficult to get clear information? Base: All Respondents, n=1,081.

Businesses in Ontario were more likely than those in Quebec to indicate labelling as a challenge (8% versus 2%). Businesses in Atlantic Canada were more likely than those in Quebec to indicate food product information were difficult to find (8% versus 1%), and more likely than any other region to indicate information on preventive control and identifying risk material was difficult to find (3% versus <1%).

Topics for which information has been hard to find					
		Region			
	Total (n=1,081)	Atlantic (n=189)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Everything (general)	5%	10%	4%	5%	4%
Labeling	5%	4%	2%	**8%**	4%
Easier to find industry-specific details	4%	1%	3%	4%	**7%**
Food product (specified)	4%	**8%**	1%	4%	4%
New regulations / changes to rules	3%	3%	3%	4%	4%
Licensing	3%	1%	5%	3%	3%
Import information	2%	2%	4%	3%	1%
COVID-19 regulations	2%	2%	1%	3%	2%
Basic sanitation and hygiene practices	2%	1%	3%	1%	2%
Export information	1%	2%	1%	1%	1%
Preventive control / identifying risk material	1%	**3%**	<1%	<1%	<1%
Product recalls	1%	-	<1%	1%	1%
Traceability / record keeping requirements	1%	1%	2%	-	<1%
Pesticides / maximum residue limits	1%	1%	1%	<1%	1%
Dietary restrictions (incl. allergens)	<1%	-	-	1%	1%
Other	3%	5%	4%	2%	3%
N1 in particular	46%	44%	35%	**48%**	**52%**
Don't know/Refused	16%	13%	**30%**	12%	11%

E8: What were some of the food safety **topics** for which you felt it was difficult to get clear information? Base: All Respondents, n=1,081.

More than half of businesses (54%) indicated using the CFIA website when looking for regulatory information, while 35% used the Government of Canada website. To a lesser extent, provincial government sources including their website were used (10%), as well as professional associations and their websites (5%), Health Canada or PHAC (4%), or their head office (3%).

Searching for regulatory information	
CFIA website	54%
Government of Canada website	35%
Provincial government / website	10%
Provincial association / website	5%
Health Canada / PHAC	4%
Google search	4%
Head office / H.O. website	3%
Other	6%
Other website	2%
Don't know / Can't remember / Refused	6%

Additional sources for regulatory information			
Website / internet (unspecified)	2%	Consultant	1%
CanadaGAP	2%	In print materials (unspecified)	1%
CFIA (other)	2%	By phone (unspecified)	1%
Colleagues	2%	Global Food Safety Initiative (GFSI) / website	<1%
U.S. Food and Drug Administration (FDA) / website	2%		

E9: Where do you look when looking for regulatory information? E9A. What was the other website that was used? Base: All Respondents, 2021, n=1,081.

Qualitative findings:

The CFIA website was seen as a powerful tool, with a lot of pertinent information. This was the main source of information for many businesses, large and small. The CFIA website has been used for a range of purposes, including finding information about licensing, importing or exporting, labeling, regulations and compliance.

Participants recognized all the information for food businesses is available at the CFIA website, however, it has been challenging finding what they need when they need it. The CFIA website was generally perceived as a tool with too many steps to get to the information they needed.

Large businesses with very particular commodities found that it takes too much time to find specific information on the CFIA website, if it can be found at all. Small businesses felt there are too many links inside links and they often get lost or redirected to other websites. Several participants mentioned they often end up in archived documents, often leaving them wondering if they have found information pertinent to the SFCR or not. More experienced users also complained about not finding information with which they were familiar on the usual place in the CFIA website, and finding it archived, also making them wonder if they should even reference that information at all.

A few participants explained that they rely a great deal on the site's search engine, which for the most part met their needs.

During the sessions, the interactive tools pertaining to the key elements of the SFCR (licensing, written preventive control plans, and tracing of food products) available on the CFIA website were shown to participants. Many large businesses were aware of the licensing interactive tool and had used it. Most found it useful.

Irrespective of the size of the business, fewer participants were aware of the PCP and traceability interactive tools. Most thought it was good they existed although they might not use it themselves, mostly because they already have a PCP and/or a traceability program in place. They did however believe these would be useful tools for any business newly exposed to the regulations or just starting out. This was echoed by the businesses in the sessions who were not familiar with these tools and were often keen to explore them.

A few businesses in the sessions had used one or a few of the tools, most commonly the licensing tool, and they all agreed that the tools were easy to find, user-friendly, gave them clear information and guidance and gave them practical information on next steps.

Businesses that had been operating for at least a few years agreed it was better to keep these tools as 3 independent tools so that they could consult only what they thought they needed. On the other hand, newer businesses, many of whom were less familiar with the regulations, thought it was better to have just 1 tool so that they could address all requirements at once.

A few participants mentioned a tool with information about labelling would be a good addition, so that they could easily tell if they need changes to their labels or not.

Regarding the virtual assistant, very few participants had noticed it on the CFIA website, and nearly no one had tried using it. The expectations of this tool were rather low. Most participants expected it to be a chat where they would be referred to links or pages with the information entered, although not many trusted it would be effective. A few expected it to be a live chat with an agent since the icon featured a headset.

Ask CFIA

In 2021, the survey also examined awareness and likelihood to use the newest digital service developed for convenient service delivery, Ask CFIA. Nearly 1 in 5 businesses (18%) were aware of Ask CFIA, with 5% having used it. Those in the retailer sector as well as micro or small companies were the least likely to have heard about the service. Regionally, awareness was the lowest in Quebec (8%) while awareness in the other three regions ranged between 16% in Ontario and 25% in both Atlantic and Western Canada.

Awareness and usage of "Ask CFIA"	
Have heard of it (NET)	18%
Have heard and used it	5%
Have heard but never used it	13%
Have not heard of it	81%
Don't know/Refused	1%

F1: Are you aware of a service offered by the CFIA called "Ask CFIA"? Base: All Respondents, n=1,081.

Awareness and usage of "Ask CFIA"									
		Industry sector				**Company size**			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler/ Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Yes (NET)	18%	**16%**	**25%**	**24%**	6%	13%	11%	**23%**	**36%**
Yes, I used it	5%	3%	**9%**	**8%**	1%	3%	2%	**7%**	**14%**
Yes, but I never used it	13%	**14%**	**15%**	**16%**	5%	10%	9%	**16%**	21%
No	81%	**84%**	74%	75%	**92%**	**86%**	**86%**	75%	64%
Don't know/ Not sure	1%	<1%	2%	1%	2%	<1%	**3%**	1%	-

F1: Are you aware of a service offered by the CFIA called "Ask CFIA"? Base: All Respondents, n=1,081.

Awareness and usage of "Ask CFIA"					
		Region			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Yes (NET)	18%	**25%**	8%	**16%**	**25%**
Yes, I used it	5%	8%	2%	5%	**6%**
Yes, but I never used it	13%	**17%**	6%	10%	**19%**
No	81%	74%	**91%**	**83%**	74%
Don't know/Not sure	1%	1%	1%	2%	1%

F1: Are you aware of a service offered by the CFIA called "Ask CFIA"? Base: All Respondents, n=1,081.

Overall, satisfaction with Ask CFIA was positive, as more than 2 in 5 users (44%) gave a satisfaction rating of 6 or 7 (on a 7-point scale), and 38% a rating of 4 or 5. This serves as a baseline for satisfaction moving forward.

Satisfaction with "Ask CFIA"	
Very satisfied (6-7)	44%
Somewhat satisfied (4-5)	38%
Not very satisfied (1-3)	18%
Don't know	-

F2: Please rate your overall level of satisfaction with "Ask CFIA" on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied. Base: Businesses that have used "Ask CFIA", n=57.

Among businesses who provided a satisfaction rating of 5 or lower, the main issues were that they felt the information was either unclear or inaccurate (36%) or that the answer they received took too long (24%). Conversely, those with higher satisfaction ratings were mostly praising how accessible and responsive the service was (29%) and that they receive accurate information and the answer to what they were looking for (27%).

Reasons for "Ask CFIA" satisfaction rating			
		Satisfaction rating	
	Total (n=57)	Ratings 1 to 5 (n=35)	Ratings 6 or 7 (n=22)
Information was unclear / inaccurate	25%	36%	11%
Service was slow / not responsive	18%	24%	11%
Found accurate information / what I was looking for	17%	9%	27%
Accessible / responsive service	16%	6%	29%
Provided helpful service (general)	15%	11%	19%
Unhelpful service (general)	9%	16%	-
Straightforward / no issues	3%	-	6%
Design is not user-friendly (general)	2%	1%	4%
Other	7%	12%	-
Don't know/ Refused	14%	7%	23%

F3: Please expand on why you provide that rating. Base: Businesses that have used "Ask CFIA", n=57.

When asked to describe why they had used the Ask CFIA service, nearly a quarter of users (24%) described a lack of clarity on the information they had found, while more than 1 in 5 (21%) felt that it was a convenient and easy alternative. Other reasons were summarized in the graph below. It should be noted that these results were based on a small number of respondents and should be considered directional.

Reasons for using "Ask CFIA"	
Information I found wasn't clear	24%
Most convenient opinion / quick and easy	21%
Couldn't find information I needed after searching on the CFIA website	18%
Didn't know was using the service (just completed the contact us/feedback form)	18%
My question was complicated / complex	11%
After hearing about the service from another source	5%
Other	14%
Don't know / Refused	3%

F4: Why did you decide to use the Ask CFIA service? Base: Businesses that have used "Ask CFIA", n=57.

Businesses that could not find or were unclear on the information they had found were asked to specify the amount of time they had spent searching online before utilizing Ask CFIA. Over 1 in 3 respondents (37%) spent more than 1 hour searching, while 19% spent 16 to 30 minutes, followed by 6% between 31 and 60 minutes.

Time spent searching online prior to using "Ask CFIA"	
16 to 30 minutes	19%
31 to 60 minutes	6%
More than 1 hour	37%
Don't know/Can't remember/Refused	38%

F5. You indicated that you either couldn't find the information or that what you found wasn't clear. Roughly how long did you spend searching online before sending your question to "Ask CFIA"? Base: Businesses that could not find or weren't clear on the information they found, n=28.

The study explored the likelihood to use Ask CFIA in the future among those who were previously unaware of the service. To make sure all respondents had at least some information about the service, businesses not having read, seen or heard anything about Ask CFIA were provided the following overview: Ask CFIA is a digital service to provide industry with 1 point of entry to ask questions to help you understand and comply with current regulatory requirements.

Based on this description, 43% were very likely to use Ask CFIA in the future and another 29% were somewhat likely. Interest was weakest among businesses in the agriculture segment and among micro businesses. Those in the wholesaler or distributor sector, as well as processors or manufacturers were the most likely to be very interested in Ask CFIA.

Likelihood to use "Ask CFIA" in the future	
Very likely (6-7)	43%
Somewhat likely (4-5)	29%
Not very likely (1-3)	26%
Don't know	2%

F6. How likely would you be to use "Ask CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses that were not aware of "Ask CFIA", n=885.

Likelihood to use "Ask CFIA" in the future									
		Industry sector				**Company size**			
	Total (n=855)	Agriculture (n=263)	Processor/ Manufacturer (n=216)	Wholesaler/ Distributor (n=184)	Retailer (n=211)	Micro (n=284)	Small (n=223)	Medium (n=326)	Large (n=49)
Very likely (6-7)	43%	31%	**47%**	**57%**	39%	38%	47%	44%	46%
Somewhat likely (4-5)	29%	29%	30%	24%	32%	27%	29%	29%	38%
Not very likely (1-3)	26%	**37%**	21%	17%	26%	**34%**	22%	23%	14%
Don't know	2%	3%	1%	2%	3%	1%	2%	3%	2%

F6. How likely would you be to use "Ask CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses that were not aware of "Ask CFIA", n=885

Likelihood to use "Ask CFIA" in the future					
		Region			
	Total (n=855)	**Atlantic (n=102)**	**Quebec (n=204)**	**Ontario (n=310)**	**West (n=269)**
Very likely (6-7)	43%	44%	39%	44%	45%
Somewhat likely (4-5)	29%	31%	27%	31%	27%
Not very likely (1-3)	26%	21%	31%	24%	27%
Don't know	2%	4%	3%	2%	1%

F6. How likely would you be to use "Ask CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses that were not aware of "Ask CFIA", n=885.

Qualitative findings:

Not many participants were aware of the Ask CFIA service in the qualitative sessions. Those who had used it had mixed reviews. Some felt it had limited value because it led to receiving more links to go through, and not necessarily the answer they were looking for initially. On the other hand, a few felt they got the information they were looking for. In terms of the timeliness of the response, here again the service received mixed reviews. Those needing information quickly were disappointed with the turnaround time, which for most seemed to be roughly 10 to 14 days. Those who were looking for non-urgent, general information were pleased with what they received.

Social media

The vast majority of respondents (90%) did not follow the CFIA on any social media platforms. Among those who follow the CFIA on a social media platform, LinkedIn was the most popular at 5%, followed by Facebook (4%), Twitter (2%) and Instagram (2%). Engagement on LinkedIn has increased from results observed in 2020.

Engagement with the CFIA on social media

	2021 (n=1,081)	2020 (n=400)
LinkedIn	5%	2%
Facebook	4%	5%
Twitter	2%	2%
Instagram	2%	2%
None of the above	90%	91%

G1: I just have a few final questions related to social media. Do you follow CFIA on any of the following social media platforms?
Base: All Respondents, 2021, n=1,081; 2020, n=400.

Respondents would be interested in seeing social media posts outlining new or updated regulations (14%), industry specific information (6%), all food safety regulations (5%) and product recalls (4%) among others.

Over a quarter of respondents (26%) do not use social media, while another 15% said they would never follow the CFIA on social media.

Social media content of interest	
New regulations / regulatory changes and updates	14%
Industry and product-specific information that applies to my business	6%
Everything / all food safety regulations	5%
Product recalls	4%
General information clearly explained / tips	3%
Tine sensitive alerts / reminders	2%
COVID-19 information	1%
Training / educational resources	1%
Other	3%
Nothing	2%
Would never follow CFIA on social media	15%
Don’t use social media	26%
Don’t know / Refused	28%

G2: What kind of information do you like obtaining or would you like to see more of on the CFIA’s social media channels? Base: All Respondents, n=1,081.

Qualitative findings:

Similar to the quantitative trend, participants in the qualitative sessions did not follow the CFIA in social media. Participants did not express any interest in receiving information from the CFIA or following them in any social media platform.

Other forms of communication included email and telephone, which are the preferred ways for most participants. Large businesses were more confident in contacting the CFIA, especially because many knew a specific person to contact, or knew how they would be reconnected to the right person. Small businesses on the other hand, tended to not proactively communicate with the CFIA – those who did had to try to find a person to talk to at the CFIA, often unsuccessfully, as the general line did not always have the answer to their questions.

A few respondents mentioned receiving e-newsletters from the CFIA. Large businesses seemed more aware of the CFIA e-newsletters. Several participants across the groups would like targeted e-newsletters with information related to their food category(ies) specifically.

Other points of communication recommended by a few participants is CFIA-featured webinars with “how to” or “this is what this means for your business” information related to compliance. They would prefer that these webinars be “live” since it would give them the chance to ask questions. Many would also appreciate if these events were industry or sector specific and involving many other businesses like theirs since they tend to learn more when they interact with their peers. Smaller businesses also explained that they learn from some of the questions that larger, more experienced companies ask at these types of events. These events could be offered directly from the CFIA or organized through industry associations and business groups.

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Respondent profile

A variety of questions were asked to study participants to obtain information on their business. This information not only allowed the research team to understand the profile of those participating in the study, but also to weight the data and ensure results are representative of the population.

Note: All results in this section are weighted.

2021 - Business profile			
Region	**Total (n=1,081)**	**Business activities**	**Total (n=1,081)**
Atlantic Canada (NET)	13%	Sell food products at retail directly to consumers	57%
Newfoundland and Labrador	2%	Import food products	23%
Prince Edward Island	2%	Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors)	29%
Nova Scotia	5%	Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial boundaries	25%
New Brunswick	3%	Grade, label or package food for export or to be sent across provincial or territorial boundaries	26%
Quebec	22%	Export food products	26%
Ontario	35%	Produce organic food [includes: organic meats, dairy, etc.]	12%
West (NET)	30%	Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries	14%
Manitoba	5%	**Company size**	
Saskatchewan	4%	1 (Self-employed)	7%
Alberta	9%	2-4 employees	24%
British Columbia	12%	5-10 employees	24%
Nunavut	-	11-99 employees	38%
Northwest Territories	<1%	100-499 employees	5%
Type of Business		500 employees or more	1%
Retailer	22%	Don't know	<1%
Processor or Manufacturer	28%	**Gross annual revenue**	
Wholesaler or distributor	24%	$30,000 or less per year	4%
Agriculture	25%	Between $30,000 and less than $100,000 per year	7%
Indigenous		Between $100,000 and less than $500,000 per year	21%
Yes	4%	Between $500,000 and less than $1 million per year	13%
No	95%	Between $1 million and less than $5 million per year	24%
Don't know/Not sure	1%	$5 million or more per year	15%
		Don't know	13%
		Refused	3%

S1A: Province/territory. S2: Which of the following categories best describes your business? S4: Which of the following activities apply to your business? S12: Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. S13: Which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. S14: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=1,081.

Business profile - region									
		Industry sector				Company size			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler /Distributor (n=243)	Retailer (n=231)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Atlantic (NET)	13%	13%	14%	13%	11%	12%	11%	14%	19%
Newfoundland and Labrador	2%	1%	3%	4%	2%	2%	2%	2%	7%
Prince Edward Island	2%	4%	2%	<1%	1%	1%	1%	2%	5%
Nova Scotia	5%	6%	4%	6%	4%	6%	5%	6%	4%
New Brunswick	3%	2%	5%	3%	3%	3%	4%	4%	4%
Quebec	22%	22%	25%	20%	18%	17%	29%	22%	16%
Ontario	35%	36%	26%	38%	41%	41%	36%	31%	23%
West (NET)	30%	29%	34%	28%	30%	30%	24%	33%	41%
Manitoba	5%	7%	6%	6%	2%	4%	5%	6%	7%
Saskatchewan	4%	4%	6%	3%	2%	4%	2%	3%	11%
Alberta	9%	8%	10%	5%	12%	9%	7%	10%	6%
British Columbia	12%	9%	12%	15%	13%	13%	8%	14%	16%
Nunavut	-	-	<1%	-	<1%	-	<1%	<1%	-
Northwest Territories	<1%	13%	14%	13%	11%	12%	11%	14%	19%

S1A: Province/territory. Base: All Respondents, n=1,081.

Business profile - industry sector									
		Region				Company size			
	Total (n=1,081)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Retailer	22%	19%	19%	26%	22%	31%	25%	21%	27%
Processor or Manufacturer	28%	31%	33%	21%	32%	20%	24%	34%	47%
Wholesale or distributor	24%	25%	22%	26%	22%	26%	24%	24%	16%
Agriculture	25%	26%	26%	26%	24%	31%	25%	21%	27%

S2: Which of the following categories best describes your business? Base: All Respondents, n=1,081.

Business profile - manufactured food sector business									
		Region				Company size			
	Total (n=271)	Atlantic (n=40)	Quebec (n=69)	Ontario (n=75)	West (n=87)	Micro (n=55)	Small (n=59)	Medium (n=117)	Large (n=39)
Yes	48%	21%	59%	50%	48%	62%	53%	44%	29%
No	51%	79%	41%	49%	48%	37%	47%	54%	71%
Don't know / Not Sure	1%	-	-	1%	3%	1%	-	3%	-

S3: Does the main product of your business include confectionary items, snack foods, beverages, oils, dried herbs and spices, nuts and seeds, coffee and tea, or processed grain-based foods such as baked goods, cereals and pasta? Base: Processing or manufacturing businesses, n=271.

Business profile - manufactured food sector business									
		Region				Company size			
	Total (n=133)	Atlantic (n=10)	Quebec (n=42)	Ontario (n=37)	West (n=44)	Micro (n=32)	Small (n=31)	Medium (n=55)	Large (n=15)
Yes	92%	38%	40%	68%	83%	55%	46%	78%	64%
No	5%	62%	59%	23%	17%	37%	54%	22%	35%

Don't know / Not Sure	3%	-	0%	8%	1%	8%	-	<1%	1%

S3a: Do you think that Manufactured Food Sector is a good description for the sector your businesses is in? Base: Processing or manufacturing businesses whose main product of their business includes confectionary items, snack foods, beverages, oils, dried herbs and spices, nuts and seeds, coffee and tea, or processed grain-based foods such as baked goods, cereals and pasta, n=133.

Business profile - business activities									
		Industry sector				Region			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler /Distributor (n=243)	Retailer (n=231)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Sell food products at retail directly to consumers	59%	45%	62%	40%	95%	57%	63%	58%	59%
Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors)	30%	23%	41%	48%	5%	34%	31%	24%	35%
Grade, label or package food for export or to be sent across provincial or territorial borders	27%	26%	49%	19%	7%	40%	30%	17%	30%
Export food products	25%	28%	37%	28%	4%	38%	25%	19%	27%
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	25%	22%	55%	13%	4%	27%	32%	17%	28%
Import food products	25%	7%	29%	46%	17%	16%	22%	26%	29%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	12%	38%	6%	3%	<1%	15%	9%	12%	12%
Produce organic food [includes: organic meats, dairy, etc.]	12%	18%	17%	5%	6%	14%	15%	10%	11%
None of the above	10%	17%	7%	12%	3%	7%	11%	12%	9%

S4: Which of the following activities apply to your business? Base: All Respondents, n=1,081.

Business profile - business activities					
		Company size			
	Total (n=1,081)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Sell food products at retail directly to consumers	59%	62%	61%	58%	47%
Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors)	30%	21%	26%	34%	61%
Grade, label or package food for export or to be sent across provincial or territorial borders	27%	11%	21%	37%	58%
Export food products	25%	14%	23%	31%	52%
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	25%	15%	21%	30%	60%
Import food products	25%	19%	18%	33%	34%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	12%	11%	11%	11%	28%
Produce organic food [includes: organic meats, dairy, etc.]	12%	12%	17%	6%	22%
None of the above	10%	11%	11%	9%	7%

S4: Which of the following activities apply to your business? Base: All Respondents, n=1,081.

Business profile - company size									
		Industry sector				Region			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler /Distributor (n=243)	Retailer (n=231)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
1 (Self-employed)	7%	12%	3%	7%	4%	4%	7%	8%	6%
2-4 employees	24%	26%	18%	25%	29%	24%	18%	28%	25%
5-10 employees	24%	24%	22%	25%	29%	20%	32%	25%	19%
11-99 employees	38%	31%	45%	38%	36%	42%	38%	34%	41%
100-499 employees	5%	5%	9%	3%	2%	8%	3%	4%	6%
500 employees or more	1%	2%	2%	1%	1%	2%	2%	<1%	2%
Don't know	<1%	<1%	<1%	-	<1%	-	<1%	-	<1%

S12: Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. Base: All Respondents, n=1,081.

Business profile - company size									
		Industry sector				Region			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler /Distributor (n=243)	Retailer (n=231)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
$30,000 or less per year	4%	5%	2%	3%	5%	3%	4%	4%	3%
Between $30,000 and less than $100,000 per year	7%	10%	5%	3%	11%	11%	8%	5%	7%
Between $100,000 and less than $500,000 per year	21%	22%	20%	16%	27%	19%	23%	24%	18%
Between $500,000 and less than $1 million per year	13%	15%	9%	14%	14%	7%	17%	15%	9%
Between $1 million and less than $5 million per year	24%	25%	24%	25%	22%	22%	23%	24%	26%
$5 million or more per year	15%	11%	20%	20%	7%	23%	9%	12%	20%
Don't know	13%	8%	16%	14%	12%	10%	14%	12%	13%
Refused	3%	4%	4%	4%	2%	5%	2%	4%	3%

S13: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=1,081.

Business profile - business size by revenue					
		Company size			
	Total (n=1,081)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
$30,000 or less per year	4%	11%	1%	-	-
Between $30,000 and less than $100,000 per year	7%	17%	5%	2%	-
Between $100,000 and less than $500,000 per year	21%	38%	28%	7%	-
Between $500,000 and less than $1 million per year	13%	15%	17%	10%	4%
Between $1 million and less than $5 million per year	24%	13%	27%	34%	9%
$5 million or more per year	15%	1%	5%	25%	62%

Don't know	13%	3%	11%	19%	22%
Refused	3%	2%	6%	3%	4%

S13: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=1,081.

Business profile - Indigenous operated									
		Industry sector				**Region**			
	Total (n=1,081)	Agriculture (n=306)	Processor/ Manufacturer (n=289)	Wholesaler /Distributor (n=243)	Retailer (n=231)	Atlantic (n=139)	Quebec (n=230)	Ontario (n=371)	West (n=341)
Yes	4%	2%	3%	6%	4%	5%	<1%	4%	6%
No	95%	98%	95%	93%	94%	94%	100%	95%	92%
Don't know / Not Sure	1%	<1%	2%	1%	2%	<1%	-	2%	2%

S14: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=1,081.

Business profile - Indigenous operated					
		Company size			
	Total (n=1,081)	Micro (n=331)	Small (n=255)	Medium (n=416)	Large (n=75)
Yes	4%	3%	6%	3%	2%
No	95%	94%	93%	96%	97%
Don't know / Not Sure	1%	2%	1%	1%	<1%

S14: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=1,081.

Business profile - ethnic retailers									
		Industry sector				**Region**			
	Total (n=614)	Agriculture (n=114)	Processor/ Manufacturer (n=171)	Wholesaler/ Distributor (n=101)	Retaile r (n=222)	Atlantic (n=82)	Quebec (n=132)	Ontario (n=212)	West (n=188)
Yes	21%	4%	17%	31%	30%	10%	16%	25%	25%
No	77%	95%	79%	68%	68%	89%	84%	73%	70%
Don't know / Not Sure	2%	1%	4%	2%	2%	1%	-	2%	5%

S15: Are at least 25% of the food products that you sell to consumers at retail considered “ethnic foods”? These would be specialty food products that are specifically, but not exclusively, targeted to specific communities (for example Italian, Chinese, Polish, German, Caribbean). Base: Businesses that sell food products at retail directly to consumers, n=614.

Business profile – ethnic retailers					
		Company size			
	Total (n=614)	Micro (n=198)	Small (n=151)	Medium (n=231)	Large (n=33)
Yes	21%	22%	25%	19%	18%
No	77%	77%	73%	78%	77%
Don't know / Not Sure	2%	1%	2%	3%	5%

S15: Are at least 25% of the food products that you sell to consumers at retail considered “ethnic foods”? These would be specialty food products that are specifically, but not exclusively, targeted to specific communities (for example Italian, Chinese, Polish, German, Caribbean). Base: Businesses that sell food products at retail directly to consumers, n=614.

Methodology

Survey methodology report

The survey consisted of a national telephone survey with businesses in the food industry in Canada based on a selected list of North American Industry Classification System (NAICS) codes provided by the CFIA. The sample frames were selected from a list of businesses from InfoCanada, a common and reputable list provider in the industry. The definition of each sector is below

Agriculture: establishments primarily engaged in growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities.[3]

Manufacturer: establishments primarily engaged in the chemical, mechanical or physical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, in the sense of becoming a raw material for an establishment to use in further manufacturing. Related activities, such as the assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat-treating, plating and similar operations are also treated as manufacturing activities.[4]

Wholesaler: establishments primarily engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The wholesaling process is an intermediate step in the distribution of goods. Many wholesalers are organized to sell merchandise in large quantities to retailers, and business and institutional clients. This sector comprises two main types of wholesalers: merchant wholesalers (that sell goods on own account) and wholesale electronic markets, agents, and brokers (that arrange sales and purchases for others).[5]

Retailer: establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are therefore organized

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[3] https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1181553&CVD=1181554&CPV=11&CST=01012017&CLV=1&MLV=5

[4] https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1181553&CVD=1181554&CPV=31-33&CST=01012017&CLV=1&MLV=5

[5] https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1181553&CVD=1181554&CPV=41&CST=01012017&CLV=1&MLV=5

to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers, store and non-store retailers.[6]

The list of NAICS codes used are listed below.

TARGETED INDUSTRIES WITH NAICS CODES			
AGRICULTURE, FORESTRY, FISHING AND HUNTING (11)			
11121101	Potato Farming	11231001	Chicken Egg Production
11121901	Other Vegetable (Except Potato) & Melon Farming	11233001	Turkey Production
11133101	Apple Orchards	11251901	Other Aquaculture
11133103	Apple Orchards	11251903	Other Aquaculture
11133104	Apple Orchards	11251904	Other Aquaculture
11133402	Berry (Except Strawberry) Farming	11292001	Horse & Other Equine Production
11133902	Other Noncitrus Fruit Farming	11293002	Fur-Bearing Animal & Rabbit Production
11141101	Mushroom Production	11293004	Fur-Bearing Animal & Rabbit Production
11141902	Other Food Crops Grown Under Cover	11299001	All Other Animal Production
11100801	All Other Miscellaneous Crop Farming	11299002	All Other Animal Production
11199803	All Other Miscellaneous Crop Farming	11299003	All Other Animal Production
11199804	All Other Miscellaneous Crop Farming	11299007	All Other Animal Production
11199806	All Other Miscellaneous Crop Farming	11299013	All Other Animal Production
11199807	All Other Miscellaneous Crop Farming	11299017	All Other Animal Production
11199808	All Other Miscellaneous Crop Farming	11421001	Hunting & Trapping
11199809	All Other Miscellaneous Crop Farming	11421004	Hunting & Trapping
11199810	All Other Miscellaneous Crop Farming	11421005	Hunting & Trapping
11199811	All Other Miscellaneous Crop Farming	11421006	Hunting & Trapping

[6] https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1181553&CVD=1181554&CPV=44-45&CST=01012017&CLV=1&MLV=5

11212001	Dairy Cattle & Milk Production	11421009	Hunting & Trapping
11212002	Dairy Cattle & Milk Production		
MANUFACTURING (31)			
31121102	Flour Milling	31161501	Poultry Processing
31121106	Flour Milling	31171001	Seafood Product Preparation & Packaging
31121107	Flour Milling	31171003	Seafood Product Preparation & Packaging
31121301	Malt Manufacturing	31171004	Seafood Product Preparation & Packaging
31122402	Soybean & Other Oilseed Processing	31171007	Seafood Product Preparation & Packaging
31122501	Fats & Oils Refining & Blending	31171008	Seafood Product Preparation & Packaging
31122505	Fats & Oils Refining & Blending	31181101	Retail Bakeries
31122508	Fats & Oils Refining & Blending	31181102	Retail Bakeries
31122511	Fats & Oils Refining & Blending	31181103	Retail Bakeries
31122512	Fats & Oils Refining & Blending	31181104	Retail Bakeries
31122516	Fats & Oils Refining & Blending	31181105	Retail Bakeries
31123001	Breakfast Cereal Manufacturing	31181202	Commercial Bakeries
31131401	Cane Sugar Manufacturing	31182101	Cookie & Cracker Manufacturing
31131403	Cane Sugar Manufacturing	31182403	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour
31135101	Chocolate/Confectionary Mfg From Cacao Beans	31182404	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour
31135201	Confectionary Mfg From Purchased Chocolate	31191102	Roasted Nuts & Peanut Butter Manufacturing
31141102	Frozen Fruit Juice & Vegetable Manufacturing	31191901	Other Snack Manufacturing
31141202	Frozen Specialty Food Manufacturing	31191905	Other Snack Manufacturing
31141203	Frozen Specialty Food Manufacturing	31191906	Other Snack Manufacturing
31141204	Frozen Specialty Food Manufacturing	31192001	Coffee & Tea Manufacturing
31142101	Fruit & Vegetable Canning	31192002	Coffee & Tea Manufacturing
31142103	Fruit & Vegetable Canning	31194101	Mayonnaise Dressing & Other Prepared Sauce Manufacturing
31142104	Fruit & Vegetable Canning	31194103	Mayonnaise Dressing & Other Prepared Sauce Manufacturing
31142106	Fruit & Vegetable Canning	31194202	Spice & Extract Manufacturing
31142107	Fruit & Vegetable Canning	31194203	Spice & Extract Manufacturing
31142303	Dried & Dehydrated Food Manufacturing	31199901	All Other Miscellaneous Food Manufacturing

31151201	Creamery Butter Manufacturing	31199902	All Other Miscellaneous Food Manufacturing
31151301	Cheese Manufacturing	31199905	All Other Miscellaneous Food Manufacturing
31151402	Dry Condensed & Evaporated Dairy Products Mfg	31199906	All Other Miscellaneous Food Manufacturing
31152001	Ice Cream & Frozen Dessert Manufacturing	31199908	All Other Miscellaneous Food Manufacturing
31161101	Animal (Except Poultry) Slaughtering	31199910	All Other Miscellaneous Food Manufacturing
31161102	Animal (Except Poultry) Slaughtering	31199913	All Other Miscellaneous Food Manufacturing
31161103	Animal (Except Poultry) Slaughtering	31199917	All Other Miscellaneous Food Manufacturing
31161104	Animal (Except Poultry) Slaughtering	31199919	All Other Miscellaneous Food Manufacturing
31161202	Meat Processed From Carcasses	31199920	All Other Miscellaneous Food Manufacturing
31161205	Meat Processed From Carcasses	31211101	Soft Drink Manufacturing
31161207	Meat Processed From Carcasses	31211102	Soft Drink Manufacturing
31161301	Rendering & Meat By-product Processing	31211103	Soft Drink Manufacturing
31161302	Rendering & Meat By-product Processing		
WHOLESALE TRADE (42)			
42441003	General Line Grocery Merchants Wholesalers	42449010	Other Grocery & Related Products Merchant Wholesalers
42441004	General Line Grocery Merchants Wholesalers	42449011	Other Grocery & Related Products Merchant Wholesalers
42441005	General Line Grocery Merchants Wholesalers	42449013	Other Grocery & Related Products Merchant Wholesalers
42442001	Packaged Frozen Food Merchant Wholesalers	42449015	Other Grocery & Related Products Merchant Wholesalers
42442002	Packaged Frozen Food Merchant Wholesalers	42449017	Other Grocery & Related Products Merchant Wholesalers
42442003	Packaged Frozen Food Merchant Wholesalers	42449018	Other Grocery & Related Products Merchant Wholesalers
42442004	Packaged Frozen Food Merchant Wholesalers	42449019	Other Grocery & Related Products Merchant Wholesalers
42442005	Packaged Frozen Food Merchant Wholesalers	42449022	Other Grocery & Related Products Merchant Wholesalers
42442006	Packaged Frozen Food Merchant Wholesalers	42449024	Other Grocery & Related Products Merchant Wholesalers s
42442007	Packaged Frozen Food Merchant Wholesalers	42449026	Other Grocery & Related Products Merchant Wholesalers

42443009	Dairy Product (Exc Dried Or Canned) Merchant Wholesalers	42449027	Other Grocery & Related Products Merchant Wholesalers
42443010	Dairy Product (Exc Dried Or Canned) Merchant Wholesalers	42449030	Other Grocery & Related Products Merchant Wholesalers
42443012	Dairy Product (Exc Dried Or Canned) Merchant Wholesalers	42449032	Other Grocery & Related Products Merchant Wholesalers
42443013	Dairy Product (Exc Dried Or Canned) Merchant Wholesalers	42449033	Other Grocery & Related Products Merchant Wholesalers
42444001	Poultry & Poultry Product Merchant Wholesalers	42449034	Other Grocery & Related Products Merchant Wholesalers
42444002	Poultry & Poultry Product Merchant Wholesalers	42449035	Other Grocery & Related Products Merchant Wholesalers
42444003	Poultry & Poultry Product Merchant Wholesalers	42449037	Other Grocery & Related Products Merchant Wholesalers
42445002	Confectionary Merchant Wholesalers	42449042	Other Grocery & Related Products Merchant Wholesalers
42445004	Confectionary Merchant Wholesalers	42449044	Other Grocery & Related Products Merchant Wholesalers
42445008	Confectionary Merchant Wholesalers	42449046	Other Grocery & Related Products Merchant Wholesalers
42445010	Confectionary Merchant Wholesalers	42449047	Other Grocery & Related Products Merchant Wholesalers
42446001	Fish & Seafood Merchant Wholesalers	42449050	Other Grocery & Related Products Merchant Wholesalers
42446002	Fish & Seafood Merchant Wholesalers	42449055	Other Grocery & Related Products Merchant Wholesalers
42447002	Meat & Meat Product Merchant Wholesalers	42449056	Other Grocery & Related Products Merchant Wholesalers
42447005	Meat & Meat Product Merchant Wholesalers	42449057	Other Grocery & Related Products Merchant Wholesalers
42447006	Meat & Meat Product Merchant Wholesalers	42449061	Other Grocery & Related Products Merchant Wholesalers
42448007	Fresh Fruit & Vegetable Merchant Wholesalers	42449064	Other Grocery & Related Products Merchant Wholesalers
42448008	Fresh Fruit & Vegetable Merchant Wholesalers	42451002	Grain & Field Bean Merchant Wholesalers
42448009	Fresh Fruit & Vegetable Merchant Wholesalers	42451005	Grain & Field Bean Merchant Wholesalers
42448010	Fresh Fruit & Vegetable Merchant Wholesalers	42459003	Other Farm Product Raw Material Merchant Wholesalers
42448011	Fresh Fruit & Vegetable Merchant Wholesalers	42459005	Other Farm Product Raw Material Merchant Wholesalers
42449002	Other Grocery & Related Products Merchants Wholesalers	42459007	Other Farm Product Raw Material Merchant Wholesalers
42449003	Other Grocery & Related Products Merchants Wholesalers	42459008	Other Farm Product Raw Material Merchant Wholesalers

42449005	Other Grocery & Related Products Merchants Wholesalers	42459010	Other Farm Product Raw Material Merchant Wholesalers
42449006	Other Grocery & Related Products Merchants Wholesalers	42459017	Other Farm Product Raw Material Merchant Wholesalers
RETAIL TRADE (44)			
44511001	Supermarkets/Other Grocery (Excluding Convenience) Stores	44529902	All Other Specialty Food Stores
44511002	Supermarkets/Other Grocery (Excluding Convenience) Stores	44529903	All Other Specialty Food Stores
44511003	Supermarkets/Other Grocery (Excluding Convenience) Stores	44529905	All Other Specialty Food Stores
44511005	Supermarkets/Other Grocery (Excluding Convenience) Stores	44529906	All Other Specialty Food Stores
44511006	Supermarkets/Other Grocery (Excluding Convenience) Stores	44529907	All Other Specialty Food Stores
44511007	Supermarkets/Other Grocery (Excluding Convenience) Stores	44529909	All Other Specialty Food Stores
44511008	Supermarkets/Other Grocery (Excluding Convenience) Stores	44529910	All Other Specialty Food Stores
44512001	Convenience Stores	44529911	All Other Specialty Food Stores
44521001	Meat Markets	44529912	All Other Specialty Food Stores
44521003	Meat Markets	44529914	All Other Specialty Food Stores
44521004	Meat Markets	44529915	All Other Specialty Food Stores
44521006	Meat Markets	44529917	All Other Specialty Food Stores
44521009	Meat Markets	44529918	All Other Specialty Food Stores
44521010	Meat Markets	44529920	All Other Specialty Food Stores
44521012	Meat Markets	44529921	All Other Specialty Food Stores
44522003	Fish & Seafood Markets	44529923	All Other Specialty Food Stores
44522004	Fish & Seafood Markets	44529924	All Other Specialty Food Stores
44523001	Fruit & Vegetable Markets	44529927	All Other Specialty Food Stores
44523003	Fruit & Vegetable Markets	44529929	All Other Specialty Food Stores
44523005	Fruit & Vegetable Markets	44529930	All Other Specialty Food Stores
44523006	Fruit & Vegetable Markets	44529932	All Other Specialty Food Stores
44529202	Confectionary & Nut Stores	44529934	All Other Specialty Food Stores
44529204	Confectionary & Nut Stores	44529936	All Other Specialty Food Stores
44529205	Confectionary & Nut Stores	44529938	All Other Specialty Food Stores
44529206	Confectionary & Nut Stores		

Quorus designed the survey instruments in English in conjunction with the CFIA Project Authority. Together, Quorus and CFIA ensured the research objectives were addressed, that plain language was used, and that the questionnaires flowed easily for respondents. Quorus collaborated with CFIA to then finalize the survey instruments. Quorus translated the client-approved English versions of the survey. Respondents had the choice to complete the interview in English or French.

Quorus informed respondents of their rights under the privacy and access to information acts and ensured that those rights were protected throughout the research process. This included: informing participants of the purpose of the research; identifying both the sponsoring department or agency and research supplier at the end of the interview; informing participants that the study will be made available to the public in 6 months after field completion through library and archives Canada, informing participants that their participation in the study was voluntary, and that the information provided would be administered according to the requirements of the privacy act.

The approved final questionnaires were programmed for computer-based telephone data collection.

A total of 1,081 businesses participated in the study. The breakdown of these businesses per year is as follows:

YEAR	Sample size	Retail only	Non-retail only
2021	**1,081**	**301**	**780**
2020	**400**	**213**	**187**
2019	**700**	**200**	**500**

Results from this research are compared to results from studies conducted in previous years, which include:

- For 2019 results: Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations: 2018-2019, Final Report, POR 029-18
- For 2020 results: Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations, Final Report, POR 059-19.

Data collection occurred between January 28th and February 25th, 2021. The average length to complete the questionnaire was 23 minutes.

All research was conducted in accordance with the professional standards established by the Government of Canada Public Opinion Research Standards, as described in the Standards for the conduct of Government of Canada Public Opinion Research – Telephone surveys.

For this study, a quota for "retail only" businesses was established to minimize the dominance of this segment in the overall sample. Data was monitored to also ensure that multiple locations from the same franchises were not overrepresented in the sample.

The margin of error of this sample size is +/- 3.0%, 19 times out of 20. The research findings can be extrapolated to the broader audience considering the margin of error associated with this sample size. The margins of error for the results in this study will vary based on a variety of factors. For instance, results for sub-groups with smaller sample sizes will have a higher margin of error. As well, the margin of error is typically highest for questions where 50% of respondents answered one way and 50% answered another way. The margin of error typically decreases as the percent for a particular response approaches 0% or 100%.

The data was weighted according to the population counts per industry vertical and province as per InfoCanada information. The potential for non-response bias nevertheless exists, since certain types of people may be less willing to participate in research.

This study saw a response rate of 10% across the entire sample.

2021 – Dialing disposition report

Total numbers attempted	**13619**
Out-of-scope - Invalid	**1714**
Unresolved (U)	**4734**
No answer/Answering machine	4734
In-scope - Non-responding (IS)	**3701**
Language barrier	92
Incapable of completing (ill/deceased)	267
Callback (Respondent not available)	3342
Total asked	**3470**
Refusal	2152
Termination	124
In-scope - Responding units (R)	**1194**
Completed interview	1081
NQ - Quota full	40
NQ - (INT32) Business is not related to food business	73
Refusal rate	**65.59**
Response rate	**10.03**
Incidence	**90.54**

Focus group and interview methodology report

The research methodology consisted of 6 online focus groups and 10 online in-depth interviews. Quorus was responsible for coordinating all aspects of the research project including designing and translating the recruitment screener and the moderation guide, coordinating all aspects of participant recruitment, coordinating the online focus group and interview platform and related logistics, moderating all sessions, and delivering the required topline report at the end of data collection.

The target population for this phase of the research project consisted of Canadian food businesses, as follows:

- Micro, small, medium and large food business, with a focus on micro and small businesses
- Food importers and exporters
- Manufactured food sector
- Ethnic food retailers

Participants invited to participate in the focus groups and in-depth interviews were recruited through a combination of random contacts by telephone and through the telephone survey that was conducted as part of this study. In the design of the recruitment screener, specific questions were inserted to clearly identify whether participants qualified for the research program and, where applicable, to ensure a good representation as follows:

- Participants represented a good mix of types of business (for example importers, exporters, manufacturers, retailers), size of business (micro, small, medium and large food businesses) and location.

The focus groups and interviews were conducted with the person in the company most responsible for food safety of the food products that the business sells or produces. This could have been the owner of the company or a manager who oversaw the sale of food products, food safety manager or quality assurance manager.

In addition to the general participant profiling criteria noted above, additional screening was done to ensure quality respondents, such as:

- No participant (nor anyone in their immediate family or household) worked in related government departments/agencies, nor in advertising, marketing research, public relations or the media (radio, television, newspaper, film/video production, etc.).
- In addition, consideration was given to excluding a participant who has worked in any such occupation in the past 5 years, as appropriate to the specific research objectives.
- No participants acquainted with each other was knowingly recruited for the same study, unless they were in different sessions that are scheduled separately.

- No participant was recruited who had attended a qualitative research session within the past 6 months.
- No participant was recruited who had attended 5 or more qualitative research sessions in the past 5 years.
- No participant was recruited who had attended, in the past 2 years, a qualitative research session on the same general topic as defined by the researcher/moderator.

Research instrument design

Quorus designed and translate the recruitment screener, and the moderation guide (used for both the focus groups and 1-on-1 in-depth interviews) for this study. Quorus provided an electronic copy of the draft version of the research instruments, in English.

The Quorus team ensured that the English recruitment screener and moderation guide were translated into French. All final versions of the research instruments were provided to CFIA in both official languages.

Description of data collection procedures

Data collection consisted of online focus groups, each lasting no more than 1.5 hours, and online 1-on-1 in-depth interviews, each lasting no more than 45 minutes.

As noted above, participants were screened by telephone and those who qualified were invited to attend. For each focus group, Quorus will recruit 8 participants to achieve 6-8 participants per focus group.

Recruitment will be conducted by our recruitment partner, CRC Research, from a variety of sources, including:

- random dialing from specific business lists (similar to the lists used to conduct the telephone survey portion of this study);
- contacting businesses that had expressed interest in participating in a follow-up qualitative group discussion or interview when participating in the telephone survey.

The recruitment of focus group and in-depth interview participants followed the screening, recruiting and privacy considerations as set out in the Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research. Furthermore, recruitment respected the following requirements:

- All recruitment was conducted in the participant's official language of choice, English and French, as appropriate.
- Upon request, participants were informed on how they could access the research findings.
- Upon request, participants were provided Quorus' privacy policy.

- Recruitment confirmed each participant's ability to speak, understand, read and write in the language in which the session was conducted.
- Informed participants of their rights under the Privacy and Access to Information Acts and ensure that those rights are protected throughout the research process. This included informing participants of the purpose of the research; identifying both the sponsoring department or agency and research supplier; informing participants that the study will be made available to the public in 6 months after field completion through Library and Archives Canada and informing participants that their participation in the study is voluntary and the information provided will be administered according to the requirements of the Privacy Act.

At the recruitment stage and at the beginning of each focus group/in-depth interview, participants were informed that the research was for the Government of Canada/ the CFIA. Participants were informed of audio/video taping of the sessions, in addition to the presence of CFIA observers, when applicable. Quorus ensured that prior consent was obtained at the recruitment stage and before participants begin their session.

Quorus provided regular recruitment updates to CFIA. Recruited participants were offered an honorarium as follows:

- $150 for all focus group participants, and,
- $100 for all online in-depth interview participants.

This incentive structure was recommended in this instance for the following reasons:

1. Given the short time frame for recruiting, we wanted to incent participants (within reason) to participate and attend as much as possible.
2. This is a standard incentive for the targeted types of participants.
3. Many of the targeted business segments are narrow and challenging to recruit – as such, when one has been reached and screened, it was important to offer an incentive high enough to motivate participation and follow-through.

All online focus groups were conducted evenings after regular business hours and all online in-depth interviews were conducted during regular business hours or during evenings (whatever suited the respondent's availability and preferences). All sessions were held using a screen-sharing application (Zoom) that allowed all participants to see and be seen by the moderator. This platform was also used to show participants the key element tools and how they worked, as well as the landing page of the My CFIA portal. All sessions were audio-video recorded for reporting purposes.

As per the structure of the 6 online focus groups conducted, 1 session was held with participants in each of the following regions/provinces (all sessions were in English except in Quebec where the session was in French):

1. Atlantic Canada
2. Ontario (other than GTA)
3. Ontario GTA
4. Quebec
5. Manitoba/Saskatchewan/Alberta
6. British Columbia

The above research framework offered the following benefits in relation to what was outlined in the Statement of Work:

- The research is Pan-Canadian, and covers as much of the country as possible within the required deadlines.
- The framework captures a mix of small, micro and medium and large sized businesses.

The 10 online 1-on-1 in-depth interviews offered an alternative to large businesses who would not be available for the focus group, and who in many respects, could have different knowledge and processes in place regarding food safety compared to micro, small and medium sized businesses. The geographic distribution of these interviews is noted below.

Location	Language	Participants	Date
1. **Interview –** Alberta	English	1	February 22
2. **Interview –** Saskatchewan	English	1	February 23
3. **Interview –** British Columbia	English	1	February 23
4. **Interview –** Newfoundland and Labrador	English	1	February 24
5. **Interview –** Ontario	English	1	February 24
6. **Interview –** British Columbia	English	1	February 24
7. **Interview –** Ontario	English	1	February 25
8. **Interview –** Ontario	English	1	March 1
9. **Interview –** Quebec	French	1	March 2
10. **Interview -** Quebec	French	1	March 4
1. **Group 1:** Atlantic Provinces (mix of the 4 provinces	English	5	March 2
2. **Group 2:** Ontario, other than GTA	English	7	March 2
3. **Group 3:** Ontario GTA	English	7	March 3
4. **Group 4:** Quebec	French	6	March 3
5. **Group 5:** Manitoba/Saskatchewan/Alberta	English	6	March 4
6. **Group 6:** British Columbia	English	7	March 4
TOTAL	**-**	**48**	

Appendices

2019 – Respondent profile

Data tables from previous research waves are presented in the following pages as a reference to the data in the main report.

2019 - Business profile			
Region	**Total (n=700)**	**Business activities**	**Total (n=700)**
Atlantic Canada (NET)	7%	Sell food products at retail directly to consumers	76%
Newfoundland and Labrador	2%	Import food products	25%
Prince Edward Island	1%	Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors)	25%
Nova Scotia	3%	Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial boundaries	25%
New Brunswick	2%	Grade, label or package food for export or to be sent across provincial or territorial boundaries	19%
Quebec	23%	Export food products or prepare food for export	14%
Ontario	36%	Produce organic food [includes: organic meats, dairy, etc.]	11%
West (NET)	34%	Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries	6%
Manitoba	4%	**Company size**	
Saskatchewan	4%	1 (Self-employed)	7%
Alberta	12%	2-4 employees	21%
British Columbia	14%	5-10 employees	28%
Nunavut	<1%	11-99 employees	36%
Northwest Territories	-	100-499 employees	6%
Type of business		500 employees or more	2%
Retailer	61%	Don't know	<1%
Processor or Manufacturer	17%	**Gross annual revenue**	
Wholesaler or distributor	14%	$30,000 or less per year	2%
Agriculture	8%	Between $30,000 and less than $100,000 per year	11%
Indigenous		Between $100,000 and less than $500,000 per year	17%
Yes	6%	Between $500,000 and less than $1 million per year	14%
No	92%	Between $1 million and less than $5 million per year	21%
Don't know/Not sure	2%	$5 million or more per year	11%
		Don't know	19%
		Refused	5%

S1: Province/territory. S2: Which of the following categories best describes your business? S3: Which of the following activities apply to your business? S5: Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. S6: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=700.

2019 —Business profile									
		Industry sector				Company size			
	Total (n=700)	**Agriculture (n=115)**	**Processor/ Manufacturer (n=227)**	**Wholesaler /Distributor (n=146)**	**Retailer (n=212)**	**Micro (n=168)**	**Small (n=168)**	**Medium (n=290)**	**Large (n=71)**
Atlantic (NET)	7%	9%	7%	9%	7%	8%	7%	7%	10%
Newfoundland and Labrador	2%	1%	1%	1%	2%	3%	1%	1%	3%

2019 -–Business profile									
		Industry sector				Company size			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler /Distributor (n=146)	Retailer (n=212)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Prince Edward Island	1%	2%	<1%	<1%	<1%	1%	<1%	1%	-
Nova Scotia	3%	2%	4%	6%	2%	2%	3%	3%	5%
New Brunswick	2%	4%	1%	2%	2%	3%	2%	2%	2%
Quebec	23%	23%	28%	15%	24%	23%	31%	21%	10%
Ontario	36%	42%	38%	51%	31%	36%	31%	35%	54%
West (NET)	34%	26%	27%	26%	38%	33%	31%	38%	26%
Manitoba	4%	6%	3%	2%	4%	2%	3%	6%	1%
Saskatchewan	4%	1%	3%	1%	5%	5%	5%	3%	3%
Alberta	12%	9%	7%	6%	15%	16%	13%	10%	6%
British Columbia	14%	10%	14%	17%	14%	10%	10%	20%	16%
Nunavut	<1%	-	-	-	<1%	<1%	-	-	-
Northwest Territories	-	-	-	-	-	-	-	-	-

S1: Province/territory. Base: All Respondents, n=700.

2019 –Business profile-industry sector									
		Region				Company size			
	Total (n=700)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Retailer	61%	56%	63%	53%	70%	72%	73%	52%	27%
Processor or Manufacturer	17%	16%	21%	18%	14%	10%	8%	24%	41%
Wholesale or distributor	14%	17%	9%	20%	11%	12%	14%	14%	19%
Agriculture	8%	10%	8%	9%	6%	6%	6%	9%	13%

S2: Which of the following categories best describes your business? Base: All Respondents, n=700.

2019 -Business profile-Business activities									
		Industry sector				Region			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler / Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
Sell food products at retail directly to consumers	76%	43%	52%	34%	96%	82%	80%	68%	81%
Import food products	25%	15%	33%	56%	17%	23%	15%	33%	23%
Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors)	25%	39%	51%	58%	8%	33%	14%	32%	23%
Prepare, process, treat, manufacture or preserve food for export or to be sent	25%	33%	71%	32%	9%	25%	25%	27%	22%

across provincial or territorial boundaries									
Grade, label or package food for export or to be sent across provincial or territorial boundaries	19%	42%	58%	23%	5%	27%	15%	22%	18 %
Export food products or prepare food for export	14%	33%	44%	16%	3%	27%	11%	16%	11 %
Produce organic food [includes: organic meats, dairy, etc.]	11%	18%	23%	8%	8%	9%	16%	12%	9%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries	6%	49%	6%	1%	1%	7%	4%	7%	4%

S3: Which of the following activities apply to your business? Base: All Respondents, n=700.

2019 Business profile-Business activities					
		Company size			
	Total (n=700)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Sell food products at retail directly to consumers	76%	81%	81%	76%	45%
Import food products	25%	17%	20%	27%	59%
Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors)	25%	15%	19%	30%	57%
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial boundaries	25%	12%	21%	31%	48%
Grade, label or package food for export or to be sent across provincial or territorial boundaries	19%	9%	12%	25%	57%
Export food products or prepare food for export	14%	5%	10%	16%	51%
Produce organic food [includes: organic meats, dairy, etc.]	11%	12%	8%	12%	19%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries	6%	2%	2%	7%	21%

S3: Which of the following activities apply to your business? Base: All Respondents, n=700.

2019 –Business profile-Company size									
		Industry sector				**Region**			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
1 (Self-employed)	7%	3%	3%	4%	8%	-	7%	7%	7%
2-4 employees	21%	19%	13%	20%	24%	30%	20%	21%	21 %
5-10 employees	28%	20%	13%	27%	33%	27%	37%	24%	25 %
11-99 employees	36%	44%	51%	38%	31%	33%	33%	36%	41 %

100-499 employees	6%	9%	16%	9%	2%	7%	2%	10%	5%
500 employees or more	2%	4%	3%	2%	1%	4%	2%	2%	1%
Don't know	<1%	1%	1%	-	-	-	<1%	<1%	<1 %

S5: Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. Base: All Respondents, n=700.

2019 -Business profile-Company size									
		Industry sector				Region			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
$30,000 or less per year	2%	-	1%	-	3%	3%	7%	1%	-
Between $30,000 and less than $100,000 per year	11%	9%	4%	4%	15%	16%	5%	14%	10%
Between $100,000 and less than $500,000 per year	17%	17%	15%	6%	19%	16%	17%	13%	20%
Between $500,000 and less than $1 million per year	14%	16%	9%	9%	16%	11%	20%	13%	11%
Between $1 million and less than $5 million per year	21%	26%	24%	25%	18%	17%	20%	18%	25%
$5 million or more per year	11%	19%	17%	28%	5%	11%	9%	12%	12%
Don't know	19%	9%	27%	19%	19%	24%	17%	21%	18%
Refused	5%	4%	4%	9%	4%	2%	5%	7%	4%

S6: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=700.

2019 –Business profile-Business size by revenue					
		Company size			
	Total (n=700)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
$30,000 or less per year	2%	8%	-	-	-
Between $30,000 and less than $100,000 per year	11%	24%	15%	1%	-
Between $100,000 and less than $500,000 per year	17%	27%	22%	7%	5%
Between $500,000 and less than $1 million per year	14%	12%	18%	15%	1%
Between $1 million and less than $5 million per year	21%	11%	17%	32%	18%
$5 million or more per year	11%	2%	5%	17%	39%
Don't know	19%	10%	17%	25%	32%
Refused	5%	6%	6%	4%	5%

S6: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=700.

2019 –Business profile-indigenous operated									
		Industry sector				Region			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
Yes	6%	2%	5%	3%	7%	9%	2%	6%	8%
No	92%	97%	93%	93%	92%	90%	97%	92%	91%
Don't know / Not Sure	2%	1%	2%	3%	1%	1%	1%	2%	2%

S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=700.

2019 -Business profile-indigenous operated					
		Company size			
	Total (n=700)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Yes	6%	7%	7%	4%	8%
No	92%	93%	92%	93%	89%
Don't know / Not Sure	2%	1%	0%	3%	3%

S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=700.

Questionnaire

2021 Survey questionnaire - English

[Programing instructions are in blue font and in square brackets]

[Interviewer instructions are in black font and square brackets and not read]

Introduction

Hello/Bonjour [pause… In Quebec Bonjour/Hello], the Government of Canada is conducting a research survey with businesses in Canada. I am hoping to speak with the person in your company who is most responsible for food safety of the food products that your business sells or produces. Please note this is not a sales call, this important research will help the Government understand Industry's views on food safety practices and regulations

This could be the owner of the company or a manager who oversees the sale of food products, food safety manager or quality assurance manager. Are you the right person to speak with? [IF NO: Can you please direct me to the correct person?]

[Repeat from beginning if transferred]

[Once correct person identified]

Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

[Note: if at this point the respondent prefers to respond in French then the interviewer must be able to either proceed with the interview in French or read the following statement: "Je vous remercie. Quelqu'un vous rappellera bientôt pour mener le sondage en français."]

My name is _____ calling from Quorus Consulting, the company hired to do the survey.

The survey will take approximately 15 minutes to complete. Please note that your participation is voluntary, confidential and anonymous and we can call back at a better time if you prefer.

IF NEEDED: This call may be monitored or recorded for quality control purposes. This survey is registered with the Canadian Research Insights Council (CRIC) and the information provided will be administered according to the requirements of the Privacy Act. Should you have any questions about the survey, I can give you a contact person within the CFIA.

To begin, I would like to confirm some information about your business...

S1A. **[Record from sample - not asked]** Province/territory

S1B. **[Record from sample - not asked]**
Full 8-digit North American Industry Classification System (NAICS) code

S2. Which of the following categories best describes your business? **[Read list-select only 1]**

11) Agriculture	1
31) Processor or Manufacturer	2
42) Wholesaler or distributor	3
44) Retailer	4
Other (please specify)_______________	77

S3. **[If S2=2: Ask]** Does the main product of your business include confectionary items, snack foods, beverages, oils, dried herbs and spices, nuts and seeds, coffee and tea, or processed grain-based foods such as baked goods, cereals and pasta?

Yes	1
No	2
Don't know / Not Sure **[Do not read, prompt if necessary]**	9

S3a. **[If S3=1: Ask]** Do you think that Manufactured Food Sector is a good description for the sector your businesses is in?

Yes	1
No	2
Don't know / Not Sure **[Do not read prompt if necessary]**	9

S3b. **[IF S3=1: Ask]** Did you know that new requirements for this sector came into force on July 15, 2020? **IF NEEDED/ASKED:** You can learn more at inspection.gc.ca.

Yes	1
No	2
Don't know / Not Sure **[Do not read prompt if necessary]**	9

S4. Which of the following activities apply to your business **[Read list-select all that apply]**?

Import food products	1
Export food products	2
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	3

Grade, label or package food for export or to be sent across provincial or territorial borders	4
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	5
Send or convey food products across provincial or territorial borders (wholesaler/ distributors)	6
Sell food products at retail directly to consumers	7
Produce organic food [interviewer note: includes organic meats, dairy, etc.]	8
None of the above	9

S5. **[If "None of the above" in S4: ask "]** What would you say is your company's main business activity?

____

____
__

[If business is related to food business recode S4 and continue, otherwise thank and terminate-keep data for quality control]

[Flag as "Retail only" if only selected "7" at S4]

S6. **[If S4=3: Ask]** Do you prepare, process, treat, manufacture or preserve food to be sold only within your province or territory?

Yes	1
No	2
Don't know / Not Sure **[Do not read prompt if necessary]**	9

S7. Do you have a process in place that will allow you to trace back your food to the company that supplied it?

Yes	1
No	2
Don’t know / Not Sure **[Do not read prompt if necessary]**	9

S8. Have you seen, read or heard anything about the Safe Food for Canadians Regulations?

Yes	1
No	2
Don’t know / Not Sure **[Do not read prompt if necessary]**	9

S9. **[If S8=1: Ask]** Where did you hear, see or read about the regulations?

____

Don’t know / Refused 99

S10. As far as you know, do you think the new Safe Food for Canadians Regulations apply to your business?

Yes	1
No	2
Don’t know / Not Sure **[Do not read prompt if necessary]**	9

S11. **[If S4=5: Ask]** Did you know that new requirements of the Safe Food for Canada Regulations came into force for the Fresh Fruit and Vegetable sector on January 15, 2020? **If needed/asked:** You can learn more at inspection.gc.ca.

Yes	1
No	2
Don’t know / Not Sure **[Do not read prompt if necessary]**	9

S12. Which of the following best represents the number of people your company employs in Canada, including yourself? If you are a franchisee, please only consider your location. **[Read list] [Just total number of employees is acceptable including part-time and casual]**

1 – [Self-employed]	1
2-4 employees	2
5-10 employees	3
11-99 employees	4
100-499 employees	5
500 employees or more	6
Don't know **[Do not read]**	8
Refused **[Do not read]**	9

S13. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. **[Read list] [If refuse]:** Just as a reminder, please understand that we use this information for classification purposes only and do not record or share the identity of any company participating in the study.**]**

$30,000 or less per year	1
Between $30,000 and less than $100,000 per year	2
Between $100,000 and less than $500,000 per year	3
Between $500,000 and less than $1 million per year	4
Between $1 million and less than $5 million per year	5
$5 million or more per year	6
Don't know **[Do not read]**	8
Refused **[Do not read]**	9

S14. Would you classify your company as Indigenous owned or operated?

Yes	1
No	2
Don't know / Not Sure **[Do not read, prompt if necessary]**	9

S15. **[If S4=7: ask]** Are at least 25% of the food products that you sell to consumers at retail considered “ethnic foods”? These would be specialty food products that are specifically, but not exclusively, targeted to specific communities (for example Italian, Chinese, Polish, German, Caribbean).

Yes	1
No	2
Don’t know / Not Sure **[Do not read, prompt if necessary]**	9

[Terminate if “Retail only” once we reach n=xxx completes with this segment]

Food safety activities

A1. On a scale from 1 to 7, where 1 means “not at all clearly” and 7 means “very clearly”, how well do you feel that you understand the food safety regulations that apply to your foods? **[Repeat scale as needed]**

1 – Not at all clearly
2
3
4
5
6
7 – Very clearly
9 – Don’t know **[DO NOT READ]**

A2. Which of the following activities, if any, applies at your company? **[Read list-select all that apply] - [Randomize]**

[Skip if retail only] Has written/documented standard operating procedures on food safety.	1
[Skip if retail only] Has preventive controls in place, but not written or documented in a plan	2
[Skip if retail only] Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program **[If asked:** HACCP stands for Hazard Analysis and Critical Control Points and QMP = Quality Management Program**]**	3
Has a traceability program established **[If needed:** written records that trace all food one step back and one step forward, as applicable**]**	4
[Skip if retail only] Uses a food safety or quality control certification system such as GFSI, ISO or QMP **[If asked:** GFSI = Global Food Safety Initiative; ISO = International Organization for Standardization and QMP = Quality Management Program**]**	5
Regularly sends staff on food safety training	6

Has an internal training program on food safety	7
Uses technology such as blockchain or similar digital systems to assist food safety	8
None of the above	9

A3. Whether or not you participate in a private certification scheme, do you support their role in achieving compliance with food safety regulations?

Yes	1
No	2
Don't know / Not Sure **[Do not read, prompt if necessary]**	9

Awareness of CFIA and the Safe Food for Canadians Regulations

B1. On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? **[Repeat scale as needed]**

1 – Not at all familiar
2
3
4
5
6
7 – Very familiar
9 – Don't know **[Do not read]**

B2. Were you aware that the Safe Food for Canadians Regulations require most businesses regulated by CFIA to…

[Read list-wait for a 'yes/no' answer for each item before reading the next item in the list- select all that apply]

Have a licence from the CFIA?	1
Have a written preventive control plan?	2
Have product traceability processes?	3
None of the above **[Exclusive]**	9

B3. [Skip if retail-only] From your perspective which of the following three key food safety elements of the SFCR would be your biggest challenge? Would it be…

[Randomize 1-3] **[Read 1-3]**

Licensing	1
Written preventive controls	2
Traceability of food products	3
None of the above	9

B4. If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. **[Repeat scale as needed]**

1 – Not at all confident
2
3
4
5
6
7 – Very confident
9 – Don't know **[Do not read]**

B5. [**If provided a score from 1 to 7**] Please expand on why you provided that answer.

____
____
__
Don't know / Refused 99

B6. As you may know the CFIA assesses risk to help determine which types of companies need to be inspected. This is often referred to as Establishment-based Risk Assessment. On a scale of 1 to 7, where 1 means nothing at all and 7 means a great deal, how much have you read or heard about Establishment Risk Analysis? **Repeat scale as needed**

1 – Nothing at all
2
3
4
5
6
7 – A great deal
9 – Don't know **[DO NOT READ]**

B7. On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA?

[Rotate statements] **[Repeat scale as needed]**	**1 Do not agree at all**	**2**	**3**	**4**	**5**	**6**	**7 Strongly agree**	**Don’t know [DO NOT READ]**
a) The CFIA is fair when inspecting food businesses.								
b) The CFIA inspections are conducted in a consistent manner.								
c) It is easy to understand the guidance the CFIA provides food businesses.								
d) The CFIA is not responsive when I ask regulatory questions.								
e) Information from the CFIA arrives in a timely manner.								
f) CFIA inspections follow rigorous logic.								
g) CFIA regulatory guidance is inconsistent.								

Impact of COVID-19 Pandemic

C1. I’d like ask a few questions about if and how the pandemic has affected your business operations. Would you say that the impact of the COVID-19 pandemic on your business operations has been… **[Read list]**

Positive, or mostly positive (that is sales have increased, costs have decreased, etc.)	1
Negative, or mostly negative (that is sales have decreased, costs have increased, etc.)	2
No effect or neutral effect (for example positive and negative impacts offset each other)	3
Don’t know / Refuse **[Do not read]**	9

C2. Did your business have to shut down at all due to COVID?

Yes	1
No	2
Don’t know / Not Sure **[Do not read, prompt if necessary]**	9

C3. **[If C2=1, ASK]** For how long did you need to shut down? Was it… **[Read list]**

For a few days	1
For a few weeks	2
For a few months	3
You are still closed, but plan to reopen once COVID is over or once you are allowed to reopen	4
You are still closed, and you are not certain if or when you'll be able to reopen	5
Don't know / Refuse **[Do not read]**	9

C4. **[If C3=1, 2 OR 3, ask]** Compared to before COVID-19 arrived in March 2020, are your hours of operation the same, longer or shorter?

Longer	1
The same	2
Shorter	3
Don't know / Not Sure **[Do not read, prompt if necessary]**	9

C5. **[If C2=1, ask]** Why did your business shut down? **[Do not read, prompt if necessary]**

Was considered non-essential	1
Sales slowed down	2
Shut down to be able to put in place safety precautions	3
Other – please specify: ____	77
Don't know / Refuse	99

C6. In thinking of how the COVID-19 pandemic has affected the way your business operates currently, which of the following most closely describes how your business has been affected? Would you say… **[Read list]**

You had to make large changes to how you conduct your business operations	1
You had to make moderate changes, or,	2
You made minimal to no changes to how you conduct your business operations	3
Don't know / Not Sure **[Do not read, prompt if necessary]**	9

C7. On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, how would you rate the following statements?

[Rotate Statements] **[Repeat scale as needed]**	**1 Do not agree at all**	**2**	**3**	**4**	**5**	**6**	**7 Strongly agree**	**Don’t know [DO NOT READ]**
a) We are struggling in adapting to the new reality of safety practices due to the COVID-19 pandemic.								
b) The CFIA has been flexible in the enforcement of regulations to allow businesses to adapt to the challenges of COVID-19.								
c) The CFIA has provided clear guidance on how they will be approaching compliance and enforcement of food rules and regulations during COVID-19.								
d) COVID-19 has made it difficult for us to comply with food safety regulations.								

Contact with CFIA

D1. I’m now going to ask you about any contact you have had with the CFIA in the last year. Please tell me which activities apply to you or your business over the last 12 months. **[Select all that apply, remind respondent of the time frame as necessary]**

You looked for information about food safety regulations or requirements on the CFIA's **<u>website</u>**	1
You contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, not including permissions, licences, registrations or certifications.	2
You contacted the CFIA for information [not requesting] on a permission, licence or certificate	3
You requested a permission, licence, registration, or certificate from the CFIA	4
You have been inspected by the CFIA within the past 12 months	5
You initiated a product recall either voluntary or ordered	6
You have not looked for information from or had any personal contact with the CFIA over the last 12 months	7
Don't know/ Refused **[Do not read]**	9

[Ask D2 if any interaction with CFIA at D1 (1-4)]

D2. You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it… **[Read list –select all that apply]**

In person	1
Over the phone	2
On the CFIA website	3
Email	4
Social media	5
Other (please specify)______________	77
Don't know/ Can't remember / Refused **[DO NOT READ]**	99

[Ask D3 if any interaction with CFIA at D1 (1-4)]

D3. How would you rate your general satisfaction with the overall service received from the CFIA in the last 12 months using a scale from 1-7, where 1 is not at all satisfied and 7 is very satisfied? **[Repeat scale as needed]**

1 – Not at all satisfied
2
3
4
5
6
7 – Very satisfied
9 – Don't know **[Do not read]**

D4. **[If provided a score from 1 to 7 in D3 ask]** Please expand on why you provided that score.

____
____
__

Don't know / Refused 99

My CFIA

E1. Have you ever heard, seen or read anything about CFIA's online portal called "My CFIA?"

Yes, I used it **[Prompt for use if yes]**	1
Yes, but never used it	2
No	3
Don't know/Refused **Do not read]**	9

[If E1="Yes, I used it" ask E2 to E4]

E2. Have you ever used the portal for a… **[Read list-select all that apply READ LIST - SELECT ALL THAT APPLY]**

New licence request	1
Licence renewal	2
Permit	3
Export certificate	4
Registration	5
You used the portal for other purposes - please specify:__________________	77
You've only enrolled and have not used it for anything in particular	98
Don't know/ Can't remember / Refused **[Do not read]**	99

E3. Please rate your overall level of satisfaction with "My CFIA" on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied. **[Repeat scale as needed]**

1 – Not at all satisfied
2
3
4
5
6
7 – Very satisfied
9 – Don't know **[Do not read]**

E4. **[If provided a score from 1 to 7 in E3 ask]** Please expand on why you provide that rating.

____
____
__

Don't know / Refused 99

E5. **[If E1=2 OR 3, ask]** To the best of your knowledge which of the following licences or permissions does your company have from the CFIA? **[Read list-select all that apply]**

Safe Food for Canadians Licence	1
A food export certificate	2

Another type of licence or certificate from the CFIA 3
Don't know/ Can't remember / Refused **[Do not read]** 9

E6. **[Skip if retail-only]** With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree".

[Rotate Statements] **[Repeat scale as needed]**	**1 Do not agree at all**	**2**	**3**	**4**	**5**	**6**	**7 Strongly agree**	**98 Not applicable / did not look for info [Do not read**	**99 Don't know [Do not read]**
a) Over the past 12 months, I've needed to spend less time searching for food safety information I require.									
b) The CFIA takes the needs of businesses into account when developing new regulatory information products.									

E7. In your opinion, what is the <u>biggest</u> challenge in <u>finding information</u> on food safety regulations or requirements? **[Probe for how they get information-the type of information is asked next at E8 and where they get their information is asked at E9] [Do not read list, select only one]**

Website is not user-friendly / difficult to navigate 1
Lack of clear information / difficult to understand 2
Lack of notifications / updates 3
Too much information / high volume of information 4
Lack of contact with customer service / not responsive 5
Research / finding information is too time-consuming 6
Other (please specify):______________ 77
None / No challenges 98
Don't know / Refused 99

E8. What were some of the food safety **<u>topics</u>** for which you felt it was difficult to get clear information?

____
____
__

N1 in particular 98
Don't know / Refused 99

E9. Where do you look when looking for regulatory information? **[Do not read list, select all that apply]**

CFIA website	1
Government of Canada website	2
Other website – obtain specific website used	76
Other (please specify):______________	77
Don't know / Can't remember / Refused	99

Ask CFIA

F1. Are you aware of a service offered by the CFIA called "Ask CFIA"?

Yes, I used it **[Prompt for use if yes]**	1
Yes, but never used it	2
No	3
Don't know/Refused **[Do not read]**	9

F2. **[If F1=1, ask]** Please rate your overall level of satisfaction with "Ask CFIA" on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied. **[Repeat scale as needed]**

1 – Not at all satisfied
2
3
4
5
6
7 – Very satisfied
9 – Don't know **[Do not read]**

F3. **[If provided a score from 1 to 7 in F2, ask]** Please expand on why you provide that rating.

____

____

__
Don't know / Refused 99

F4. **[If F1=1, ask]** Why did you decide to use the Ask CFIA service? **[Do not read list, select all that apply]**

Couldn’t find information I needed after searching on the CFIA website	1
After hearing about the service from another source	2
Information I found wasn’t clear	3
My question was complicated / complex	4
Didn’t know was using the service (just completed the contact us/feedback form)	5
Other (please specify):______________	77
Don’t know / Refused	99

F5. **[If F4=1 and/or 3, ask]** You indicated that you either couldn’t find the information or that what you found wasn’t clear. Roughly how long did you spend searching online before sending your question to “Ask CFIA”? **[Read list if needed]**

Less than 5 minutes	1
5 to 15 minutes	2
16 to 30 minutes	3
31 to 60 minutes	4
More than 1 hour	5
Don’t know / Can’t remember / Refused **[Do not read]**	9

F6. **[If F1=3, ask]** Ask CFIA is a digital service to provide industry with one point of entry to ask questions to help you understand and comply with current regulatory requirements. How likely would you be to use “Ask CFIA” in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? **[Repeat scale as needed]**

1 – Not at all likely
2
3
4
5
6
7 – Very likely
9 – Don’t know **[Do not read]**

Social Media

G1. I just have a few final questions related to social media. Do you follow CFIA on any of the following social media platforms? **[Read list – select all that apply]**

Facebook	1
Twitter	2
Instagram	3
LinkedIn	4
None of the above	9

G2. What kind of information do you like obtaining or would you like to see more of on CFIA's social media channels? **[Do not read list- accept all that apply– ACCEPT ALL THAT APPLY]**

____

____

Would never follow CFIA on social media	97	
Don't use social media		98
Don't know / Refused	99	

Follow-up for recruitment

Thank you very much for all your feedback. This survey will help the Canada Food Inspection Agency, or CFIA, gain insights into the Canadian food industry on their views towards food safety and food safety regulations. However, there is always need for more information to fully understand businesses experiences and opinions and we would want to get your feedback in a different way, through focus groups.

To do that, we would like to follow-up with you, to invite you to be part of a focus group later in February. This focus group involves a conversation with a small group of decision makers from food businesses in Canada using an online platform, with live video and audio, so that we can talk more about the topics explored in the survey.

Similar to the survey you just completed with me, all of your answers and your identity would remain confidential and your contact information would not be used for any other purpose other than to invite you to the online research phase.

Are you interested in participating? I will need your first name, your email and a telephone number where we can follow-up to invite you and provide you with more details in terms of a date, time and technology needed. Your email address would only be used to send you the login instructions to the online focus group and any friendly reminders.

YES: **Collect** If no, thank and end interview

Name ______________________________
E-mail _____________________________
Telephone __________________________________

Thank you, please wait for our call to provide you with the focus group details.

That concludes the interview. On behalf of the Canadian Food Inspection Agency, thank you very much for your participation in this research. If you are interested in learning more about the CFIA and food safety, please consult inspection.gc.ca/SafeFood. The CFIA Toolkit for Businesses has informative digital tools that can answer whether or not you need a licence and the required timelines, whether or not you need a written preventive control plan, and it outlines any traceability requirements that may apply to your business.

Focus group and in-depth interview moderation guide

A. Introduction (8 minutes)

- Introduce moderator and that he works with Quorus Consulting, and they are conducting this research on behalf of the Government of Canada/CFIA (the moderator is not a Government of Canada employee)

- Thanks for attending/value you being here

- Explain general purpose of focus group discussions:

  - Gauge opinions about issues/ideas/products

  - <u>Not</u> a knowledge test; no right or wrong answers (interested in opinions)

  - Today's session will last approximately 90 minutes.

  - Okay to disagree; want people to speak up if hold different view

  - Do not need to direct all comments to me; can exchange ideas with each other

  - Looking for candor and honesty; comments treated in confidence; reporting in aggregate form only; video recording and note-taking for report writing purposes only; observers are on the web conference as well.

  - All comments will remain confidential and anonymous and the recordings are not shared with anyone. If we wanted to share the recordings or any of your personal information, we would need to obtain your express written consent first.

  - If you have a cell phone, please turn it off.

  - To participate in this session, please make sure your webcam and your microphone are on and that you can hear me clearly. If you are not speaking, I would encourage you to mute your line to keep background noise to a minimum…just remember to remove yourself from mute when you want to speak!

  - I may share my screen to show you some things.

So, let’s go around the table and have every1 introduce themselves…I’ll be curious to know the following:

- You are all involved in the food industry in one way or another - what type of business exactly do you own/operate/manage?
- What is your role or your position?

B. General attitudes towards and awareness of food regulation and compliance (10 minutes)

- Our conversation today will touch on a range of topics related to food regulation and compliance in Canada. To get us started on this topic, how would you generally describe Canada’s approach to food regulation?

- How familiar would you say you are with the regulations that apply to your own company?

- Is it easy or difficult to stay on top of changes in these regulations?
    - Based on your experience, are the food safety regulations in Canada easy to understand? Help me understand if there are issues on that front.
    - What are some of the resources you rely on to help you stay on top of changes in regulations?

- One of the more recent regulations to be introduced in Canada is the Safe Food for Canadians Regulations. How would you describe the manner in which this regulation was rolled out to food businesses like yours?
    - How did you hear about them?
    - Do you feel you are up to speed on these regulations?

C. Challenges in compliance (30 minutes)

Let’s turn our attention to compliance and some of the challenges your business may still face or may have overcome to comply with current food regulations.

- Generally, how easy or difficult is it for your business to comply with food regulations in Canada?

- What are some of the main challenges your business faces? What do you think is behind these challenges?

- What do you think is behind some of the success your business has experienced in meeting food regulations in Canada?

- As you may know, there are three key elements of the SFCR – I'd like to explore each one with you and understand if you face any particular challenges in these areas.

  - Were you aware that under the SFCR, your food business may need a **licence**?
    - Did any of you need to obtain a licence because of the introduction of the SFCR?
    - How easy or difficult has it been for your business to obtain or renew your licence? **Moderator to get clear feedback from recently licenced business versus renewals**
      - What, if anything, has made this part of the process easy?
      - Have you encountered any challenges on this front? If so, help me understand those challenges.

  - Were you aware that under the SFCR, your business may need a **written preventive control plan**?
    - I don't want to assume anything here – are some of you unfamiliar with written preventive control plans?
    - Did any of you need to introduce or update written preventive control plans in your business because of the introduction of the SFCR? **Moderator to get clear feedback from new plan users versus those who already had a plan in place**
    - How easy or difficult has this process been for your business?
      - What, if anything, has made this part of the process easy?
      - Have you encountered any challenges on this front? If so, help me understand those challenges.

  - The last area is ensuring the **traceability of food products**. Were you aware that under the SFCR, your business may need a process in place that allows you to trace back your food to the company that supplied it?

        - I don't want to assume anything here – are some of you unfamiliar with food traceability processes or protocols?
        - Did any of you need to introduce or update your food traceability plans in your business because of the introduction of the SFCR? **Moderator to get clear feedback from new plan users versus those who already had a plan in place**
        - How easy or difficult has this process been for your business?
            - What, if anything, has made this part of the process easy?
            - Have you encountered any challenges on this front? If so, help me understand those challenges.

- Is there any other area related to the SFCR that has been challenging for your business or perhaps may prove problematic in the near future?

[Moderator to explore if not already discussed in previous report of this section]

- Has the COVID-19 pandemic affected your ability to comply with regulations? If so, in what way?

D. CFIA role in food safety regulation (15 minutes)

I'd like to spend some time discussing the CFIA.

- In your own words, what exactly is the role of the CFIA? **Moderator to get feedback from few participants**

- Generally, what are some of the things you feel the CFIA does particularly well? Help me understand those answers…

- And in what ways do you feel the CFIA needs to improve or change? Help me understand those answers…

- Specifically in terms of helping your business comply with food regulations in Canada, in what ways, if any, do you feel the CFIA has supported your business or made it easier for your company to comply?

    - Has the CFIA helped your business in any way overcome your compliance challenges <u>during the pandemic</u>? If so, in what ways?

        - What do you think of the support you have received from the CFIA?

- As far as you know, is there anything you believe the CFIA could or should be doing to better support your business in its efforts to comply with food regulations in Canada these days?

There are some specific CFIA activities I'd like to explore with you – I'd like to get a sense of how you feel the CFIA is doing in these areas:

- Do you have any feedback in terms of how the CFIA conducts its **inspections**?
    - What do you feel works well in this area?
    - In what ways do you feel they could improve?

- Do you have any feedback in terms of the **regulatory guidance** the CFIA provides food businesses?
    - What do you feel works well in this area?
    - In what ways do you feel they could improve?

E. CFIA tools (15 minutes)

Let's now discuss some of the CFIA's resources.

<u>CFIA website</u>

- Have you been to the CFIA website in the last couple of years? **Show of hands**

  If yes:
    - Do you have any feedback on the website?
    - In recent memory, is there information you had trouble finding on the website or that you feel should simply be easier to find on their website?
    - In what ways has the website helped your business comply with food regulations in Canada?

I'm going to show you some tools that are available on the CFIA website.

Share screen and walk participants through site and tools

The first one is designed to help in Licensing, the second one on PCP, and the third one on Traceability.

These tools help businesses find out, in roughly 5 minutes, if they require a licence, a written
Preventive Control Plan (PCP) or whether they need to prepare and keep traceability records.

- Which ones were you aware of?
- Have you used these tools? …if so which ones?
- What has been your experience with these tools?
- Do you have any suggestions on how, if at all, the CFIA should change or improve these tools?

- Would it be better to have one tool instead of three? How would that help you?
    - Are there any tools the CFIA should add to its website, again in an effort to support your business in terms of complying with regulations?

<u>My CFIA</u>

- There is also a portal called My CFIA where businesses can manage and track services online, including certificates, licences, permits and registrations.

Share screen and show participants main page

- Have you ever used this service?
    - **If yes**: What are the advantages of using this platform? What is the most helpful? What do you use more often?
    - **If no**: Did you know it existed? What do you think of it?

<u>Ask CFIA</u>

- Are you aware of a service offered by the CFIA called “Ask CFIA”?
- Have you ever used this service?

If yes

- Do you remember what you used it for or what information you were trying to find?
- What was your experience like?
- What suggestions, if any, do you have to improve this specific service?

F. Effectiveness of SFCR communications (5 minutes)

I would like to turn our attention to communications from the CFIA as we near the end of our conversation.

- How would you describe the communications you receive from the CFIA?
    - More specifically, how would you describe the communications you received from the CFIA regarding the SFCR?
        - Is there something you feel they did really well?
        - What do you think they should have done differently?

- Moving forward, how can communication from the CFIA be improved to address your compliance needs?

    - Should the CFIA be using certain outreach strategies more than they are today to make sure you have the information you need to satisfy your company's compliance requirements? …what should they be using to better reach **you**?

G. Thank and close (2 minutes)

[Moderator checks with client teams regarding any new questions/clarifications needed]

In parting, is there anything that you think I should have asked but I didn't?

Thanks again! The team that invited you to participate in this session will contact you regarding the manner in which you can receive the incentive we promised you. And have a great evening!

CFIA recruitment screener

Online focus groups: (E=English; F=French) **Group 1:** Atlantic Provinces (mix of the 4 provinces) (E); March 2, 5:30 pm AST (4:30 pm EST) **Group 2:** Ontario urban centres other than Toronto (E); March 2, 7:30 pm EST **Group 3:** Ontario GTA (E); March 3, 5:30 pm EST **Group 4:** Quebec (F); March 3, 7:30 pm EST **Group 5:** Manitoba/Saskatchewan/Alberta (E); March 4, 5:30 pm CST/4:30 pm MST (6:30 pm EST) **Group 6:** British Columbia (E); March 4, 5:30 pm PST (8:30 pm EST)	**Details:** recruit 8 for 8 to 6 to show Incentive: $150 90 minute sessions
Online in-depth interviews: (E=English; F=French) **Total of 10 sessions** **Aim for 2 sessions in French and 8 in English** **Mix of:** • **Type of business** • **Size of business** • **Location**	**Details:** recruit 10 participants Incentive: $100 45 minute sessions

Target audience:

The target population for this phase of the research project consists of Canadian food businesses, as follows:

- Micro, small, medium and large food business
- Food importers and exporters
- Manufactured food sector
- Ethnic food retailers

There should also be a good mix of business lines recruited, including retail, e-commerce businesses, service, manufacturing businesses, businesses serving businesses (B2B) and companies doing business internationally.

A. Introduction

Hello, my name _______________. I'm calling from Quorus Consulting, a Canadian public opinion research company and we are calling on behalf of the Canadian Food Inspection Agency (CFIA).

[Use this intro if contact is a new recruit, otherwise go to intro 2]:
Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

[Interviewer note : For English groups/interviews, if participant would prefer to continue in French, please respond with, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à cette recherche. Nous vous remercions de votre intérêt." For French groups/interviews, if participant would prefer to continue in English, please respond with, "unfortunately, we are looking for people who speak French to participate in this research. We thank you for your interest."]

From time to time, we solicit opinions by sitting down and talking with people and the business community. We are preparing to conduct a series of these discussions on behalf of the Government of Canada and the CFIA and I would like to speak to the individual in your organization who is most responsible for food safety of the food products that your business sells or produces. Please note this is not a sales call, this important research will help the Government understand industry's views on food safety practices and regulations.

This could be the owner of the company or a manager who oversees the sale of food products, food safety manager or quality assurance manager. Are you the right person to speak with?
Once appropriate contact has been reached-repeat intro if needed and continue:

INTRO 2

You may remember completing a survey for the CFIA in recent weeks. At that point you indicated being interested in participating in further research that we are conducting.

[All respondents}
We are reaching out to you today to invite you to a research session to share your feedback on the opportunities and challenges the food industry and your company face and the role the Government of Canada plays in relation to these.

Other decision makers from companies located in Canada will be taking part in this research. It is a first-name basis only discussion so nobody, including the Government of Canada, will know the companies being represented. For their time, participants will receive a cash compensation.
The sessions could take place at one point between the end of February and the beginning of March.

Participation is voluntary and all opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy, including the Privacy Act

and the Access to Information Act. We are simply interested in hearing your opinions, no attempt will be made to sell you anything. The format could be an online “round table” or 1-on-1 discussion lead by a research professional.
Protecting the health and economic well-being of Canadians during the COVID-19 pandemic is a priority for the Government of Canada. The results to questions such as these help the Government of Canada continue to deliver on its mandate and to improve its work.

[Interviewer note: If asked about privacy laws, say: “The information collected through the research is subject to the provisions of the Privacy Act, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation.”]
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 businesses. This should only take about 5 minutes. In case you are uncertain, **all my questions pertain to your company’s Canadian operations.** May I ask you a few questions?

Yes	1	**Continue**
No	2	**and Thank and terminate**

B. Business and participant profile

1. How would you rate your own level of familiarity with the food safety protocols of the food products that your business sells or produces? Would you say you are... **Read options- recruit a mix**

    - Very familiar
    - Fairly familiar
    - Not very familiar
    - Not at all familiar

If not very or not at all familiar, ask: Since this will be one of the themes discussed, is there someone else in your company who would be more familiar with these protocols?
If yes, ask to speak with that person instead. If no, thank and discontinue [DO NOT ASK Q2 TO Q8 if recruit comes from survey. Populate based on survey results]

2. In what province or territory is your company located?

Newfoundland and Labrador	1
Nova Scotia	2
Prince Edward Island	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Yukon	11

Nunavut	12
Northwest Territories	13

3. **[Record from sample - not asked]**
   Full 8-digit North American Industry Classification System (NAICS) code

4. Which of the following activities apply to your business **[Read list-select all that apply]**?

Import food products	1
Export food products	2
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	3
Grade, label or package food for export or to be sent across provincial or territorial borders	4
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	5
Send or convey food products across provincial or territorial borders (wholesaler/ distributors)	6
Sell food products at retail directly to consumers	7
Produce organic food [interviewer note: includes organic meats, dairy, etc.]	8
None of the above	9

5. **[If "None of the above" in Q4: Ask]** What would you say is your company's main business activity?

   ____

   [IF BUSINESS IS RELATED TO FOOD BUSINESS RECODE Q4 AND CONTINUE, OTHERWISE THANK AND TERMINATE]
   [Flag as "Food importers/exporters" if selected 1,2,4,5 at Q4]
   [Flag as "manufactured food sector" if selected "3" at Q4]

6. **[If Q4=7: ask]** Are at least 25% of the food products that you sell to consumers at retail considered "ethnic foods"? These would be specialty food products that are specifically, but not exclusively, targeted to specific communities (for example Italian, Chinese, Polish, German, Caribbean).

Yes	1
No	2
Don't know / Not Sure **[Do not read, prompt if necessary]**	9

   [Flag as "ethnic retailers" if selected "1" AT Q6]

[If only code “7” at Q4 flag as “retail only”] <u>Recruit a maximum of 2 “retail only” per group</u>
[All other options at Q4 and Q6 are recorded as is.]

7. Which of the following best represents the number of people your company employs in Canada, including yourself? If you are a franchisee, please only consider your location. **[Read list] [Just total number of employees is acceptable including part-time and casual]**

1 – [Self-employed]	1	
2-4 employees	2	
5-10 employees	3	
11-99 employees	4	
100-499 employees	5	**Recruit for in-depth interviews if not available for focus group**
500 employees or more	6	**Recruit for in-depth interviews**
Don’t know **[Do not read]**	8	**Terminate**
Refused **[Do not read]**	9	**Terminate**

8. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. **[READ LIST] [IF REFUSE:** Just as a reminder, please understand that we use this information for classification purposes only and do not record or share the identity of any company participating in the study.**]**

$30,000 or less per year	1	
Between $30,000 and less than $100,000 per year	2	
Between $100,000 and less than $500,000 per year	3	
Between $500,000 and less than $1 million per year	4	
Between $1 million and less than $5 million per year	5	**Recruit for in-depth interviews if not available for focus group**
$5 million or more per year	6	**Recruit for in-depth interviews**
Don’t know **[Do not read]**	8	**Terminate**
Refused **[Do not read]**	9	**Terminate**

9. Does your business sell any of its products via e-commerce? **Accept all that apply**

Yes	1	**Aim for at least 6 across all groups/sessions**
No	2	

10. Can you please provide me with your job title? ______________________________

11. Participants in discussion groups or interviews are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in front of others? Are you... **Read options**

o Very comfortable		**Min 5 per group**
o Fairly comfortable		
o Not very comfortable	**Terminate**	
o Not at all comfortable	**Terminate**	

12. Have you ever attended a discussion group or interview on any topic that was arranged in advance and for which you received money for your participation?

- o Yes **Maximum 5 per group**
- o No **Go to invitation**

13. When did you last attend one of these discussion groups or interviews?

o Within the last 6 months	**Terminate**
o Over 6 months ago	

14. How many discussion groups or interviews have you attended in the past 5 years?

o Fewer than 5	
o 5 or more	**Terminate**

If qualifies for focus groups
C. Online focus group invitation

I would like to invite you to participate in an online focus group discussion with a senior research consultant from a Canadian public opinion research company, Quorus Consulting. The session for businesses in your region is scheduled take place on **[Day of week]**, **[Date]**, at **[Time]**. It will last one and a half hours (90 minutes). People who attend will receive $150 to thank them for their time. We will get this to you either by email transfer or by mailing you a check at the conclusion of the session.

Would you be willing to attend?

o Yes	
o No	**Terminate**

The session will be audio recorded for research purposes and representatives of the Government of Canada research team may be on the line as remote observers. You will be asked to acknowledge that you will be audio recorded during the session. The recordings will be used only by the Quorus Consulting research team and will not be shared with others. As I mentioned, all information collected in the group discussion will remain anonymous and be used for research purposes only in accordance with laws designed to protect your privacy.

To conduct the session, we will be using a video conferencing application so that you can see material that the moderator will want to show the group. We will need to send you the instructions to connect by email. The use of a computer is necessary since the moderator will want to show material to participants to get their reactions – that will be an important part of the discussion. **You can use a tablet if you so choose however you cannot use a smartphone to participate in this discussion since the screen size is too small.**

If asked: You will be asked to use a webcam to participate so please be sure that the device you use has a properly functioning microphone and webcam.

Over the coming days we will be sending you an email with the web link to connect to the online session as well as the date and time of the session.

We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 to 15 minutes prior to your session.

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to participate, please call so that we may get someone to replace you – you cannot choose your own replacement if you cannot attend. You can reach us at **1-800-XXX-XXXX** at our office. Please ask for **[recruiter to provide]**. Someone will call you the day before to remind you about the discussion.

So that we can send you the email with the logistics, call you to remind you about the session or contact you should there be any changes, can you please confirm your name and contact information for me? **Collect on front page**

Thank you very much for your help!

If qualifies for online in-depth interviews

D. Online Interview Invitation

I would like to invite you to participate in an online 1-on-1 interview with a senior research consultant from a Canadian public opinion research company, Quorus Consulting. The session will take place during working hours local time between **February 22nd** and **March 4th,** during regular business hours. It will last 45 minutes. Participants receive $100 to thank them for their time. We will get this to you either by email transfer or by mailing you a check at the conclusion of the session.

Would you be willing to attend?

- Yes
- No **Terminate**

When would you be available?

- Date:_______________
- Time:_______________

The session will be video and audio recorded for research purposes and representatives of the Government of Canada research team may be on the line as remote observers. You will be asked to acknowledge that you will be recorded during the session. The recordings will be used only by the Quorus Consulting research team and will not be shared with others. As I mentioned, all information collected in the group discussion will remain anonymous and be used for research purposes only in accordance with laws designed to protect your privacy.

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If asked: You will be asked to use a webcam to participate so please be sure that the device you use has a properly functioning microphone and webcam.

Over the coming days we will be sending you an email with the web link to connect to the online session as well as the date and time of the session.

We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 minutes prior to your session.

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to participate, please call so that we may get someone to replace you – you cannot choose your own replacement if you cannot attend. You can reach us at **1-800-XXX-XXXX** at our office. Please ask for **[recruiter to provide]**. Someone will call you the day before to remind you about the interview.

So that we can send you the email with the logistics, call you to remind you about the session or contact you should there be any changes, can you please confirm your name and contact information for me? **Collect on front page**

Thank you very much for your help!