



Canadian Food
Inspection Agency

Agence canadienne
d'inspection des aliments

Public opinion research to identify segments of industry reachable through compliance promotion campaigns

Executive summary

Prepared for:

Canadian Food Inspection Agency
Communications and Public Affairs Branch
Engagement, Corporate, and e-Communications Directorate

Supplier name: Patterson, Langlois Consultants

Standing offer number: EP363-140002/014/CY

Call up number: 39903-210666/001/CY

Contract value: \$169,478.01

Award date: December 22, 2020

Delivery date: March 31, 2021

Registration number: POR 088-20

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Canada 

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March 31, 2021

This public opinion research report presents the results of a survey conducted by Patterson, Langlois Consultants on behalf of the Canadian Food Inspection Agency. The research study was conducted with 1,167 Canadian businesses between February 18 and March 12, 2021.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique pour déterminer les segments de l'industrie qu'on peut atteindre au moyen de campagnes de promotion de la conformité

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1400 Merivale Road
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Catalogue Number: A104-207/2021E-PDF

International Standard Book Number (ISBN): 978-0-660-38877-9

Related publications (registration number): POR 088-20

A104-207/2021F-PDF (Final Report, French)

978-0-660-38878-6

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1.0 Executive summary

1.1 Background and objectives

The CFIA regularly develops or amends regulations, and an important part of this process is communicating with regulated parties to ensure understanding and compliance. This often requires different communications delivered to the regulated parties based on their different needs and goals. For example, the CFIA needs to understand which types of businesses have the highest risk to become non-compliant and how best to influence a change in behaviour. The *Safe Food for Canadians Regulations* (SFCR) in particular affect a large number of companies that previously had minimal exposure to the CFIA and are therefore likely to not be aware of the requirements as well as the services and tools the Agency makes available to aid compliance.

This public opinion research initiative was designed to group businesses into categories that can be individually described, identified, and influenced to assist CFIA communication activities in compliance promotion and program development. The study collected behavioural, attitudinal and opinion data and then used this data to segment businesses according to compliance-related issues.

This research aimed to:

- identify common barriers to compliance and motivations for compliance
- identify sources of information and influence that can be used to assist in compliance promotion
- identify and describe key attributes that assist in understanding and predicting compliance and non-compliance
- identify a profile for companies that are likely to not comply either intentionally or unintentionally
- identify and describe corporate characteristics that can be used to predict areas of non-compliance (such as a weak culture of compliance or financial challenges)
- create a model that segments companies into identifiable groups based on level of risk of non-compliance, corporate characteristics and attitudinal data of key corporate decision makers
- examine effectiveness of certain message types in promoting compliance to possible segments

1.2 Methodology

The research consisted of a quantitative online survey of $N = 1,167$ businesses. The survey took approximately 20 to 25 minutes to complete and explored company attitudes, culture, structure, and behaviours with regard to food safety compliance. Businesses belonged to one or more of the following categories: food businesses conducting activities related to importing, exporting or interprovincial trade of food

products ($n = 1042$), businesses regulated by federal plant health regulations ($n = 204$), and businesses regulated by federal animal health regulations ($n = 210$).

Recruitment was done using e-mail and phone-to-web methods. E-mail recruitment made use of the CFIA Customer Relationship Management (CRM) database, while phone-to-web recruitment made use of a business sample list based on the North American Industry Classification System (NAICS) codes provided by the CFIA.

1.3 Results

Segmentation:

Segmentation analysis used 9 dimensions of differentiation, the most important of which were the degree of embrace of regulation, the concern for compliance with regulations, the perception of the relevance of regulations to the business and its customers, and the “progressiveness” of the company. The analysis found that CFIA-regulated businesses could be segmented into 4 distinctive groups, each with its own differentiated dispositions and opinions: Regulation Embracers, Emerging Businesses, Conventional Corporate Utilitarians, and Regulation Resisters.

Regulation Embracers tend to be larger, future-oriented businesses with several hundred employees and consistent year-round business. These businesses score highly on all 4 major dimensions and have an overall positive disposition toward the CFIA and its regulatory mandate. These businesses are more likely to have organization structure related to food safety procedures, training, and compliance, and because of this they generally have a good understanding of CFIA regulations. As frequent communicators with the CFIA, this segment is more likely to receive information from the CFIA through My CFIA portal notices, and were much more likely to report that these communications were effective: 56% considered them “effective” or “highly effective”, compared to only 30% across the other 3 segments.

Emerging Businesses tend to be young businesses with around 100 employees and they are more likely to have weekend or seasonal peaks in business. These businesses are also more likely to be female-led (42%). They rate high on degree of embrace but low on concern for compliance and perception of relevance, and are less likely to have formal food safety training or distinct food safety divisions set up. Despite this, 54% consider themselves at least “somewhat confident” that they understand CFIA regulations. These businesses have confidence in the CFIA and generally consider regulations fair and sensible, but also have little concern with their own regulatory compliance. One reason this segment might be unconcerned is that few have faced a sanction or regulatory response, likely because these businesses are inspected infrequently: only 2% reported being inspected more often than monthly, and 29% reported “not applicable” as their inspection frequency. This segment also tends to communicate with the CFIA much less frequently.

Emerging Businesses are more likely to prioritize online business channels and to have started/increased selling through online channels since COVID.

Conventional Corporate Utilitarians skew towards large, long-standing businesses with several hundred employees. About 1/3 of these businesses also have operations in the United States. These businesses rate low on embrace of regulation but high on concern about compliance. The nature of these businesses means that they are more likely to have a department dedicated to formal processes for food safety compliance, so they are familiar with the CFIA, its mandate, and how it operates. They may feel like CFIA regulations are 'too complicated' and not always based on 'common sense', but they also understand why CFIA regulations are in place and are very aware that compliance is in their best interest. They also believe that their customers care about food safety, so they are dedicated to preserving their good records. They are "highly engaged" stakeholders who will often be members of industry associations, and they know how to communicate their questions and concerns to the CFIA.

Conventional Corporate Utilitarians generally think the pandemic has impacted them negatively but do not feel like they are at a disadvantage compared to their competitors. Perhaps as a function of their longstanding nature, they have largely not switched focus to online sales.

Regulation Resisters tend to be smaller, domestically-focused businesses with less than 100 employees. These businesses score relatively low on all 4 major dimensions. They are much less likely to have divisions or departments dedicated to food safety or to formal processes to stay up-to-date with compliance standards. These businesses have very low familiarity with the CFIA, and do not believe the CFIA to be a helpful regulatory agency. They believe that food safety regulations are too extensive, complicated, and expensive to implement. They do not perceive complying with CFIA regulations to be very important to them or their customers, and therefore have low concern about compliance. These businesses are less likely to communicate with the CFIA and are especially unlikely to access the CFIA website or My CFIA portal notices.

Interestingly, businesses that belong to this segment are more likely to feel like they have been put at a disadvantage versus competitors when it comes to the impact of the COVID-19 pandemic, perhaps pointing towards broader attitudes of feeling that their business is under pressure.

Drivers and barriers to compliance:

The study also examined overall drivers and barriers to compliance. The most significant drivers of compliance are related to organizational culture: wanting to set the standard for the industry, having a reputation for food safety, and having a company culture that prioritizes food safety were all ranked in the top 5 drivers of compliance, and this is generally consistent across food, animal, and plant lines of business. The CFIA should emphasize to its regulated parties that building an organizational culture around compliance is a self-fulfilling prophecy: the business needs to be committed to setting the standard for its industry and building a reputation as a part of its broader commitment to nourishing this "compliance culture".

The most significant barrier to compliance is a lack of understanding: almost 25% of businesses indicate that there is a lack of understanding about the changes to CFIA

regulations. This presents a clear opportunity for the CFIA to focus messaging on “what has changed”.

CFIA communication effectiveness:

The study also examined the overall effectiveness of CFIA communication methods. Most respondents (82%) reported receiving information from the CFIA through email, and roughly 2/3 of those who communicated with the CFIA through email reported that this method was effective for understanding regulation and driving compliance. The second most common method of receiving information from the CFIA was through the CFIA website, and about half of those who accessed the site found it effective. Telephone calls and in-person visits from a CFIA representative were both infrequently used as methods of communication but resulted in higher levels of understanding and compliance than many other methods.

1.4 Discussion and next steps

These findings may be extrapolated to the broader population of CFIA-regulated businesses because of the broad recruitment process and the large sample size. However, non-response bias is a possible confound, since certain types of businesses may be more willing to respond to a survey request than others. Self-report bias is also a possible confound, since businesses might want to place themselves higher or lower on certain scales than where more objective measurements would place them.

The results of this research will be used to improve the targeting of Agency messaging promoting awareness of and compliance with CFIA regulations. Different types of businesses will be more receptive to different kinds of messaging based on their attitudes, opinions, circumstances, and goals. Based on the analysis that we have provided, there are some considerations which are intended to stimulate constructive dialogue with the goal of improved compliance across industry stakeholders and improving CFIA efficiency.

First and most importantly, compliance enforcement efforts should focus on further understanding Regulation Resisters, since these businesses have much less confidence about their own compliance and generally have an adversarial view of the CFIA. Some of the indicators that a business would fall in with Regulation Resisters would be low organizational structure related to compliance, negative attitudes towards the CFIA, self-identification as “less progressive”, and less of a focus on environmentalism. To help these businesses improve compliance once they have been identified, the CFIA should focus on educating them on the usefulness of the CFIA website and My CFIA portal notifications. These businesses tend to not use these tools, perhaps contributing to their lack of understanding and their compliance difficulties.

With regard to Emerging Businesses and Conventional Corporate Utilitarians, only small adjustments to current approaches are recommended. Emerging Businesses are often quite “young” and have relatively little experience with the CFIA, and are much less likely to be inspected than other businesses. There is an opportunity to visit these

businesses more often but to apply a distinctly “educational” approach during these interactions, focusing on teaching these businesses the regulations that are relevant to them and providing them with better understanding on how to access information. Furthermore, the CFIA can emphasize to these businesses that their food safety compliance supports their broader progressive positioning to the outside world. Conventional Corporate Utilitarians, on the other hand, are already highly engaged with the CFIA and very protective of their self-interests. To maximize the efficiency of engagements with this group, focus on engaging with industry associations to help cascade information and compliance strategies.

Finally, we have identified that Regulation Embracers are strongly supportive of the CFIA mandate and are highly confident in their compliance. The CFIA can likely reduce their interactions with these businesses without impacting their strong rates of compliance. These businesses are defined by an organizational “culture of compliance” that is often very apparent in their structure, and the CFIA can likely improve its efficiency by investing less resources in this segment. Streamlining communications with these businesses towards more automated options such as, email, the CFIA website, and My CFIA portal notices is also recommended, since the various methods of communication lead most often to improved understanding and compliance in this segment.

This Public Opinion Research was conducted by Patterson, Langlois Consultants. The contract value was \$169,478.01.

Political neutrality statement

I hereby certify as a Representative of Patterson, Langlois Consultants that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed: March 31, 2021

A handwritten signature in black ink, appearing to be 'P. Langlois', written over a horizontal line.

Principal,
Patterson, Langlois Consultants