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Inspection Agency

Agence canadienne  
d'inspection des aliments

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

## Final report

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Canadian Food Inspection Agency  
Communications and Public Affairs Branch  
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Canada 

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

### **Final report**

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Supplier name: Patterson, Langlois Consultants

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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# 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 a stylized 'P' followed by a name, written over a horizontal line.

Principal,  
Patterson, Langlois Consultants



## 2.0 Background and objectives

### 2.1 Background

As with many regulators, the CFIA is regularly developing or amending regulations under their mandate. The new approach often requires different communications and education programs delivered to the regulated parties.

As part of the CFIA's commitment to delivering timely information and guidance to regulated parties, the Agency has developed compliance promotion tools and services to help industry in meeting food safety regulations. The *Safe Food for Canadians Regulations* are expected to affect a large number of companies that previously had minimal exposure to the CFIA, so they are even more likely to not be aware of the services and tools the Agency makes available to industry to help them comply with their regulatory obligations.

The CFIA understands that increasing awareness and understanding of regulatory requirements is essential in promoting compliance. In order to develop a more consistent, strategic and effective compliance promotion approach, 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.

A research initiative designed to segment businesses into categories that can be described, identified and influenced. This will assist CFIA communication activities in promoting compliance promotion as well as program design and development. There is an added interest in understanding the effects of compliance promotion activities as it relates to risk and the cost-effectiveness of CFIA control measures. This research has obtained the behavioural, attitudinal and opinion data needed to segment businesses according to compliance-related issues.

Results of previous public opinion research studies with food businesses show that:

- The food industry is reasonably aware of the CFIA and most business managers are very confident in their ability to meet food safety regulations. Small businesses are less confident.
- Knowledge of the *Safe Food for Canadians Regulations* (SFCR) is limited, but increasing.
- Respondents know more about the specific food safety requirements within the SFCR than they do about the Act and Regulations themselves.
- Many already engage in compliance behaviours comparable to the SFCR through food safety regimes required by clients (for example, Global Food Safety Initiative, or GFSI). However, small businesses are less likely to report having a written preventive control plan.
- Satisfaction with the CFIA is high among those who have had recent contact with the Agency, including those who have recently been inspected.

- Concerns about dealing with the Agency tend to relate to the difficulty in finding relevant information in order to answer specific questions.
- The CFIA is typically seen as a fairly reasonable and even helpful regulator.

## **2.2 Objectives**

The main objective is to use the findings to develop preliminary statistical models of the barriers to compliance and motivations to compliance that will help program design and development.

Enforcement and service activities also require an understanding of motivations to comply and barriers to compliance.

This public opinion research aims 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 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

# 3.0 Methodology

## 3.1 Survey specifications and sample profile

### Survey specification:

- Online quantitative survey, approximately 20 to 25 minutes in length, original target was 1,000 businesses
- Explored company attitudes, culture, structure, and behaviours with regard to food safety compliance
- Created an organizational segmentation based on attitudes towards regulation, compliance, and the CFIA, overlaid across business lines (food, plant, animal)
- Understand key barriers to compliance across segments

### Target sample:

Targeted the industrial regulated parties of the CFIA and achieved N = 1,167 total responses:

- food businesses conducting activities related to or in preparation for importing, exporting or interprovincial trade of food products (N = 1042)
- businesses regulated by federal plant health regulations (N = 204)
- businesses regulated by federal animal health regulations (N = 210)

\*Note that businesses were allowed to self-select the industrial segments that they belong to, and businesses were allowed to identify if they were regulated under more than one CFIA business line (food, plant or animal). As such, the business lines reported above are not mutually-exclusive.

### Recruitment:

Recruitment of industrial regulated parties was accomplished through 2 different sampling methods:

- emailing businesses in the CFIA CRM database (~18,000 federally regulated parties) with link to online survey (N = 1,007)
- phone-to-web recruitment using sample lists (N = 160)

## 3.2 Sampling results

The most robust portion of the sample for this study comes directly from the CFIA Customer Relationship Management (CRM) database. The CFIA sent out email invitations to 10,448 businesses that are included in their CRM list, and 1007 businesses completed the survey (125 French, 882 English), for a 10% completion rate. The average survey length for the online survey was 27 minutes, and while this was longer than expected, the time elapsed when a respondent conducts the survey does not necessarily align perfectly with survey duration, as respondents may not always complete the survey all at once.

The businesses that were not part of the CFIA CRM list were contacted by a contracted third party (Advanis) and were identified using a list of business sample that was purchased from ASDE Inc. and generated by pulling specific North American Industry Classification System (NAICS) codes that were provided to Advanis and element54 by the Canadian Food Inspection Agency (CFIA). After a respondent was recruited to participate by phone, they were sent an initial email or SMS invitation to complete the survey. Reminders were sent if they did not complete the survey after 3 days, and another reminder was sent if they did not complete the survey within 6 days after the initial invitation.

In total, Advanis called 3,953 phone numbers for recruitment outside of the CFIA CRM scope, and 771 people agreed to participate in the survey. Of those who agreed to participate, 14% were conducted in French and 86% were conducted in English. To increase the response rate, inbound calling was allowed and directed to interviewers trained on the survey. As is standard procedure, if the potential respondent called from the phone that was initially dialled by someone in the call centre, the calling record was automatically displayed to an interviewer. A total of 57 inbound calls were received, and of those, 23 were then recruited to participate. On average recruitment calls took approximately 3 minutes. An overall response rate of 26% was achieved on the recruiting calls. The response rate calculation is presented in Appendix A. In total, 160 people (23 French, 137 English) who were recruited by phone completed the web survey, for a show up rate of 21%.

There is potential for non-response bias if particular types of businesses did not want to answer the survey. Since this survey samples an extremely broad range of industrial parties that are regulated by the CFIA, there is no data reference point available that would allow any weighting to be applied. When contacted, all businesses were given equal chance to provide their feedback and several different sampling methods were used to help try to reduce non-response bias. Another potential bias that should be identified is that this research asked individuals working for regulated parties to evaluate their own company's organizational culture and disposition towards the CFIA. While we have specifically asked for only the individuals that are most familiar with CFIA regulations to participate in the survey, there is always some inherent bias when individuals are asked to speak on the behalf of organizations.

# 4.0 Segmentation

## 4.1 Segmentation approach in detail

An attitudinal segmentation provides the CFIA with greater insight than straightforward profiling. Segmentation takes a large group of companies with disparate attitudes and behaviours specific to compliance and groups them into segments, each with a more homogeneous set of dimensions that differentiate them from each other in terms that will both allow the CFIA to identify distinct targets and to deploy the messages and positioning that will further their compliance with the regulations. This enables the CFIA to focus on a more manageable set of priority segments, ensuring that communications will have greater relevance and likelihood of success to increase compliance.

High-quality statistical segmentation requires a multi-faceted approach to variable selection, clustering, profiling, and segment evaluation. We used the overall approach outlined below to produce viable segments that are meaningful, relevant, well-differentiated, of sufficient size, and reachable.

### Step 1:

- Selected a subset of key related outcomes to use as dependent variables for a series of attitudinal-based drivers analyses
- The results of the driver analyses highlight important correlates of desired outcomes

### Step 2:

- Apply cross-correlations and factor analysis to understand the attitudes dimensions underlying the complete set of attitudes
- The factor analysis identifies subsets of attitudes that are most representative of each dimension/theme

### Step 3:

- Selected a preliminary set of input variables for statistical clustering techniques to produce a range of initial segment solutions
- Reviewed the segment solutions and refined the input variables

### Step 4:

- Reviewed and evaluated multiple segment solutions and selected a final 4 segment solution for scorecard creation and personal/attitudinal development
- We selected the 4-segment solution based on this solution generating segments that were meaningful, relevant, well-differentiated, of sufficient size, and reachable

- Scorecards will segment name, size, and a high-level summary of all key attitudes, behaviours, and firmographic variables. Firmographics refers to the combination of demographic and geographic factors which can help organizations segment their customer companies.

## 4.2 Segmentation results

Analysis of the results of segmentation analysis showed that businesses regulated by the CFIA can be divided into 4 appropriately-sized and distinctive groups, each with its own differentiated firmographic features, attitudinal dispositions, and opinions about communication with the CFIA. The most important dimension of differentiation between the 4 segments was their “Degree of Embrace” towards CFIA regulations: on one end of the spectrum, Regulation Embracers were highly receptive to CFIA regulation, while Regulation Resisters took the opposite perspective, largely rejecting the CFIA mandate and having a very negative opinion towards CFIA regulations.

### Figure 4.2.1:

We have identified 4 distinct segments that vary significantly when compared across 9 different attribute dimensions.

#### Regulation Embracers: 26% of CFIA-regulated businesses

Larger businesses with positive dispositions towards food safety regulation and the CFIA. Lots of organizational structure in place to manage food safety compliance because compliance is important to them.

Attribute dimension	Rating (1-10)
Degree of embrace of regulations (poor to strong)	10
Concern about compliance (no concern to high concern)	9
Relevance of regulations & advocacy (not important to important)	10
Progressiveness (not progressive to progressive)	10
Decision Making (singular to consensus)	10
Temporal Focus (planners to day to day)	1
Customer Base (many to few)	8
Domestic/ International (domestic to international)	7
Perception of CFIA Fairness (unfair to fair)	10

### Emerging Businesses: 21% of CFIA-regulated businesses

Smaller businesses that skew 'younger.' They understand why food safety regulations exist, but they have very little interaction with the CFIA. As such, they are relatively unconcerned with their compliance.

Attribute dimension	Rating (1-10)
Degree of embrace to regulations (poor to strong)	8
Concern about compliance (no concern to high concern)	1
Relevance of regulations & advocacy (not important to important)	2
Progressiveness (not progressive to progressive)	5
Decision Making (singular to consensus)	2
Temporal Focus (planners to day to day)	7
Customer Base (many to few)	1
Domestic/ International (domestic to international)	1
Perception of CFIA Fairness (unfair to fair)	8

### Conventional Corporate Utilitarians: 32% of CFIA-regulated businesses

Large and longstanding companies, with lots of organizational structure related to compliance. Mixed disposition towards the CFIA, but very concerned with their own compliance (as in their best-interest).

Attribute dimension	Rating (1-10)
Degree of embrace to regulations (poor to strong)	2
Concern about compliance (no concern to high concern)	10
Relevance of regulations & advocacy (not important to important)	8
Progressiveness (not progressive to progressive)	6
Decision Making (singular to consensus)	6
Temporal Focus (planners to day to day)	2
Customer Base (many to few)	10

Domestic/ International (domestic to international)	<b>10</b>
Perception of CFIA Fairness (unfair to fair)	<b>5</b>

**Regulation Resisters: 21% of CFIA-regulated businesses**

Often smaller businesses with low CFIA familiarity, little organizational structure around food safety and less progressive company culture. Highly adversarial to the CFIA.

<b>Attribute dimension</b>	<b>Rating (1-10)</b>
Degree of embrace to regulations (poor to strong)	<b>1</b>
Concern about compliance (no concern to high concern)	<b>4</b>
Relevance of regulations & advocacy (not important to important)	<b>1</b>
Progressiveness (not progressive to progressive)	<b>1</b>
Decision Making (singular to consensus)	<b>1</b>
Temporal Focus (planners to day to day)	<b>10</b>
Customer Base (many to few)	<b>3</b>
Domestic/ International (domestic to international)	<b>2</b>
Perception of CFIA Fairness (unfair to fair)	<b>1</b>

Another significantly differentiating dimension that emerged across the 4 segments was their “Concern for Compliance”. Here, Emerging Businesses emerged as a highly-distinct segment within the data: these businesses tended to be young and not inspected very often, and concern for CFIA compliance was low, despite being generally understanding and supportive of the CFIA mandate. On the other end of this “Concern for Compliance” spectrum, Conventional Corporate Utilitarians emerged from the data, a group that tended to consist of larger and more long-standing businesses with a high degree of interaction with and inspection by the CFIA: these businesses are strongly concerned with their compliance and focused on the elements that implicate them directly.

Related to both “Degree of Embrace” and their “Concern for Compliance”, a third highly-differentiating dimension emerges: the “Relevance of Regulations and Advocacy” of each segment. For Regulation Embracers and Conventional Corporate Utilitarians, the perception is that CFIA regulations are highly relevant and very important to both them and their customers, and therefore these businesses were highly concerned with



compliance and much more likely to advertise the measures they have in place to remain compliant. Alternatively, Regulation Resisters and Emerging Businesses felt that CFIA regulations were not nearly as relevant to themselves or their customers – albeit for different reasons – and therefore businesses in these segments are much less likely to communicate the measures that they have in place to remain compliant with CFIA regulations.

Finally, some dimensions were identified that may start to add focus to the potentially predictive lens of this research. For example, the data shows that strongly compliant segments have strong associations with organizational progressiveness, with “more progressive” companies being more likely to be strongly-compliant and “less progressive” companies tending to fall in with Regulation Resisters. Relatedly, “Decision Making” was associated with “Progressiveness”, with the more progressive segments reporting that decisions were more likely to be made by consensus by a larger group of people, while less progressive segments reported that the decision-making was more likely to be made by one or a small number of individuals.

The answers to the following codes at question number A1 were used to gauge organizational progressiveness:

- The company culture is progressive
- We have a strong focus on environmentalism
- We are considered a 'leader" within our industry
- The company is generous in donating to charitable causes

Additionally, the data shows that the segments are also differentiated by their Temporal Focus: for example, Regulation Embracers were more likely to be more long-sighted, prioritizing planning and not allowing their day-to-day operations hinder the scope of their strategic plans. On the other hand, Regulation Resisters tended to be much less focused on long-term planning and were more likely to report that their long-term plans were hindered by their day-to-day operations. Finally, there are also some predictive elements related to the types of customers a business is focused on serving: Regulation Embracers and Conventional Corporate Utilitarians are more likely to conduct business outside of Canada and their revenue is more likely to come from a smaller base of customers, while Emerging Businesses and Regulation Resisters were more likely to be focused on a larger base of primarily domestic customers.

The following section provides more detail about each segment, and references the Segment Summaries that follow in Figures 1.1 to Figures 4.4.

### **4.3 Segment profiles**

#### **Regulation Embracers:**

The firmographics of Regulation Embracers skew towards larger businesses with several hundred employees, somewhat more likely to be operating in Quebec. These businesses are more likely to have peak business hours occurring on weekdays and during the day, and business is likely to be consistent year-round. Aside from

firmographics, the most significant factor that distinguishes Regulation Embracers is their positive attitudinal disposition towards the CFIA (and food safety compliance more generally). These businesses tend to have lots of organizational structure related to food safety, are far more likely to have separate divisions or departments that manage food safety compliance, formal on-the-job food safety training, and formal processes to ensure that the business remains up-to-date on compliance standards. They are very familiar with the CFIA and its mandate, and have a very good understanding of how the CFIA operates, the role of inspectors, and where to find information about CFIA regulations; these businesses are very confident in their understanding of CFIA regulations (Figure 1.1).

The organizations that make up the Regulation Embracers segment tend to be much more long-sighted, where planning is prioritized and day-to-day operations do not impact long-term strategic decision-making. Decisions are more often made in consensus across a larger group, which is perhaps related to generally more “progressive” attitudes in these businesses: they are more likely to be focused on environmentalism, more likely to consider themselves leaders in their industry, and 80% of Regulation Embracers consider their company culture to be ‘progressive’. When it comes to opinions about the CFIA, the understanding of why CFIA regulations were in place and the perception that complying with regulations are in their best interest were agreed upon universally: all businesses in this segment answered positively regarding the role of CFIA regulations and that compliance is in their best interest. These businesses do not believe that compliance with CFIA regulations is overly complicated or expensive, and they believe that their compliance record is extremely important – both to themselves and to their customers – so they will often proactively advertise the food safety compliance measures that they have in place. Regulation Embracers believe that the CFIA is a helpful organization and frequently communicate their industry’s specific needs (Figure 1.2).

Considering their strong degree of embrace of CFIA regulations, the high relevancy of regulations to them, and their overall positive disposition towards the CFIA, it is no surprise that confidence in CFIA regulatory compliance is highest among Regulation Embracers: 91% said they feel that compliance if inspected today would be “very likely”, and almost half (43%) expected perfect compliance on a day when an inspection is not expected. 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). The vast majority of these businesses consider their treatment by the CFIA to be ‘fair’, and all of these businesses that had faced a sanction in the past reported that their inspector was helpful in avoiding future non-compliance (Figure 1.3).

**Figure 1.1:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample.

**Segment size:** 26%

**Business line:** 92% food business, 17% plant health business, 16% animal health business

<b>Profile</b>	
Average number of employees	278.0
Average annual revenue	20.3 million
Duration of operation	More than 25 years (46%)
Duration of operation (food safety)	More than 5 years – less than 25 years (47%)
Region of business activity	Quebec (47%) (+)
Region where CFIA regulations apply	Quebec (26%) (+)
Ownership	Privately held (84%)
Headquarter	Canada (89%)
Hours of operation	Weekdays 9am-5pm (47%)
Busiest time of the week	Weekdays, during the day (84%) (+)
Busiest time of the year	Consistent year-round (35%) (+)
Indigenous owned	No (90%)
% senior Management	Male (65.3%)

### **Organization regulation structure**

Written statements	92% (+)
Process to ensure compliance standards are met	89% (+)
Employee for regulation compliance	87% (+)
Employees for quality control in production	84% (+)

On-the-job training	80% (+)
Formal training	68% (+)
Division to manage regulatory compliance	68% (+)

### Level of confidence in understanding CFIA regulations

<b>Top 2</b> (very or somewhat confident)	95% (+)
Very confident	54% (+)
Somewhat confident	41%
Neutral	4% (-)
Not very confident	1% (-)
Not confident at all	0% (-)

### Familiarity with...

(Top 2: very / somewhat familiar)

Client specific quality requirements	95% (+)
Role of CFIA inspectors	92% (+)
Where to find information about CFIA regulations	92% (+)
Way CFIA operates	86% (+)
International product/ quality standards	79% (+)

### Familiarity with CFIA mandate...

(Top 2: very / somewhat familiar)

<b>CFIA mandate</b>	<b>92% (+)</b>
Traceability requirements	95% (+)
Mitigating risks to food safety	92% (+)

Protect environmental biodiversity	63% (+)
Protect the natural environment from invasive species	60%
Protect the natural environment from plant diseases/pests	59%
Improving plant resource program designs/delivery	42%
Preventing animal health risks/ zoonotic diseases	33%
Humane transportation of animals	31%
Improving animal health program designs/delivery	29%

**Impact of COVID**

(Top 2: '4 or 5' rating on a 5-point scale)

Prior to COVID, company was growing	70%
My main competitors would likely feel the same impact of COVID on their operations	67%
Since COVID, company has had to make significant changes to survive	42%
Since COVID, company has been growing	38%
Company has been negatively affected by COVID	33%
COVID has benefitted the company	33%
Since COVID, company has started to or increased selling to customers via online channels	19% (-)
COVID has given my competitors an advantage	12%
COVID has caused my company to completely shut down	12%

**Figure 1.2:**

Refer to Appendix for the questions. (+X) indicates over (above 115) and (-X) is under (below 85) indexing against the total. (+) and (-) indicate significant differences at 95% CL vs. total sample.

### Opinion about regulations / CFIA

(Top 2: '4 or 5' rating on a 5-point scale)

Complying with CFIA regulations are in our own best interest	100% (+)
Understands the reason why CFIA regulations are in place	100% (+)
CFIA regulations are designed and implemented to keep Canadians safe	99% (+)
CFIA regulation are implemented fairly to all businesses	94% (+)
CFIA regulations are based on common sense	89% (+)
CFIA regulations are very complicated	13% (-)
Not enough resources to ensure implementation of CFIA regulations perfectly always	8% (-)
Too much regulation by the CFIA	7% (-)
Too many employees to ensure implementation of CFIA regulations perfectly always	6% (-)
Implementing CFIA regulations is too expensive	3% (-)

### Organizational attitudes (top 5 based on index)

#### Over indexing:

Important decisions made with large group	42% (+215)
Company conducts business out of Canada	51% (+155)

Strong focus on environmentalism	74% (+154)
Company culture is progressive	80% (+153)
Considered leader within our industry	62% (+148)

**Under indexing:**

Long term plan affected by daily operations	25% (-53)
Company sells products to customers online	20% (-76)

**Opinion about regulations / CFIA**

(Top 2: '4 or 5' rating on a 5-point scale)

Representatives are helpful in providing info on regulations	97% (+)
Have confidence in the CFIA	94% (+)
Representatives are helpful in preventing future non-compliance	88% (+)
Representatives are helpful in resolving existing issues	87% (+)
CFIA is a helpful regulatory agency	85% (+)
Company is able to find specific info about CFIA regulations quickly and easily	76% (+)

**Food safety compliance attitudes**

(Top 2: '4 or 5' rating on a 5-point scale)

Proud of our compliance record	99% (+)
Very concerned about complying with CFIA regulations	88% (+)
Complying with CFIA regulation is a concern, but we are confident we do	81%
Complying with CFIA regulation requires our constant attention	81% (+)

Advertise the regulatory measures we have in place to our customers	69% (+)
Frequently communicates with the CFIA regarding our industry's specific needs	51% (+)
Considers potential financial ramifications for not complying with CFIA regulations as part of the "cost of doing business"	32%
Not concerned about potential business suspension for not complying with CFIA regulations *	7% (-)
Regulatory compliance record is not important to our customers	6% (-)
Not concerned about potential financial implications of not complying with CFIA regulations	6% (-)
Regulatory compliance record is not important to us	0% (-)

**Figure 1.3:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample. Caution: base too small.

**5%** experienced a sanction/regulatory response due to non-compliance.

**60%** faced financial impact of the sanction.\*

**53%** implemented new HR-related initiatives.\*

**7%** faced impact on the corporate reputation.\*

**43% (+)** of Regulation Embracers estimated a rate of 100% compliance on a regular day when inspection is not inspected.

**Inspector provided information to avoid future non-compliance?\***

Yes	100% (+)
No	0%

**Regulatory response was from...\***

CFIA	47%
Provincial regulators	33%
Client/customer-specific regulators	13%
International regulators	7%
Internal corporate regulators	0%



### Compliance likelihood if inspected today

Very likely	91% (+)
Somewhat likely	8% (-)
Not very likely	0% (-)
Not at all likely	1%

### Top 5 methods of communication for receiving information from CFIA

E-mail	86%
CFIA website	55%
Portal notice in My CFIA	39% (+)
In-person visits from CFIA rep	35%
Telephone	22%

### Effectiveness of communication in understanding the regulations

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	80% (+)
CFIA website	65% (+)
Portal notice in My CFIA	56% (+)
In-person visits from CFIA representative	65% (+)
Telephone	54% (+)

### Effectiveness of communication in driving compliance

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	79% (+)
CFIA website	65% (+)
Portal notice in My CFIA	53% (+)
In-person visits from CFIA representative	65% (+)
Telephone	52% (+)

### CFIA inspection frequency

More often than monthly	7%
Monthly or every 2 months	6%
Semi-annually	14%

Annually	30%
Less than annually	24%
Not applicable	18%

**Perception of fair treatment\***

<b>Top 2</b> (fair or somewhat fair)	93% (+)
Fair	67% (+)
Somewhat fair	27%
Somewhat unfair	0%
Unfair	1%

**Section footnotes:**

- 1.1: Base: Regulation Embracers N=304; Questions: S2, X1-X13, B1-B3, S3, A2
- 1.2: Base: Regulation Embracers N=304; Questions: S2, D1-D3, A1
- 1.3: Base: Regulation Embracers N=304; Questions: S2, C2, C3B, C7, C8, C1, C4-C6;
- \*Base: Those who have been sanctioned N=15; Questions: C3C, C3E, C3F

**Emerging Businesses:**

Emerging Businesses tend to be smaller businesses with 100 employees or less and lower-than-average annual revenues, and a huge differentiator within this segment is the relatively ‘young’ age of many of these businesses: roughly 1/3 of the businesses in this segment are less than 5 years old. These businesses are more likely to have non-traditional hours of operation (for example, many report that the weekends are when their business is most busy) or have peak seasonal periods (for example, 35% reported that their business is busiest during the summer), and businesses that are regulated by Federal Animal Health regulations were somewhat less likely to be represented in this group. In terms of organizational structure, these businesses were more likely to be female-led and often featured significantly less structure with regard to food safety compliance: they were not likely to have formal training or separate divisions set up to manage regulatory compliance. Despite low organizational structure with regard to food safety compliance, Emerging Businesses had a somewhat average familiarity with the CFIA, and most (54%) consider themselves at least “somewhat confident” that they understand CFIA regulations. Perhaps as a function of their relatively young business age, these businesses were more likely to have started/increased selling through online channels since COVID, with almost 40% having reported doing so. (Figure 2.1).

This prioritization of online business channels also appears in the organizational attitudes of Emerging Businesses, who are almost twice as likely to sell products to

consumers online versus the other 3 segments. Attitudinally, as smaller and younger businesses, these companies tend to have most decisions being made by a small number of individuals; they are more likely to have their long-term plans impacted by the realities of their day-to-day operations. Their client base tends to be more diversified, but their business model is often simpler: less structure and low bureaucracy, and often focused on specific business channels. Emerging Businesses understand the reason why CFIA regulations are in place and generally considers them fair and sensible, and they do not feel like there is too much regulation, or that regulation is overly complicated or expensive to implement. These businesses have confidence in the CFIA, but also have little concern with their own regulatory compliance. (Figure 2.2).

One of the reasons why this segment might be so unconcerned with regulatory compliance might be because so few have faced a sanction or regulatory response, likely because these businesses are inspected so infrequently: only 2% reported being inspected more often than monthly, and 29% reported “not applicable” as their inspection frequency, indicating that they do not receive regular inspections. Since these businesses are not inspected as often and are less concerned with compliance, they tend to use the My CFIA portal much less often to receive communications from CFIA, and are much less likely to communicate with CFIA representatives directly. Since visits from a CFIA representative are also much less frequent, these interactions are also not considered “routine”, and interactions with CFIA representatives are therefore much less likely to help improve their understanding of regulations or help improve compliance (Figure 2.3).

**Figure 2.1:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample.

**Segment size:** 21%

**Business line:** 90% food business, 13% plant health business, 13% animal health business

<b>Profile</b>	
Average number of employees	104.2
Average annual revenue	9.3 million (-)
Duration of operation	Less than 5 years (29%) (+)
Duration of operation (food safety)	Less than 5 years (33%) (+)
Region of business activity	West (53%)

Region where CFIA regulations apply	West (41%)
Ownership	Privately held (89%)
Headquarter	Canada (94%)
Hours of operation	Weekdays 9am-5pm (41%)
Busiest time of the week	Weekends, during the day (21%)
Busiest time of the year	Summer (35%) (+)
Indigenous owned	No (85%)
% senior management	Female (41.6%) (+)

**Organization regulation structure**

Employees for quality control in production	76%
Employee for regulation compliance	67% (-)
Written statements	66% (-)
Process to ensure compliance standards are met	66% (-)
On-the-job training	60% (-)
Formal training	46% (-)
Division to manage regulatory compliance	39% (-)

**Level of confidence in understanding CFIA regulations**

<b>Top 2</b> (very or somewhat confident)	83%
Very confident	29%
Somewhat confident	54% (+)
Neutral	12%

Not very confident	4%
Not confident at all	0% (-)

### **Familiarity with...**

(Top 2: very / somewhat familiar)

Client specific quality requirements	83%
Role of CFIA inspectors	81%
Where to find information about CFIA regulations	81%
Way CFIA operates	71%
International product/ quality standards	63%

### **Familiarity with CFIA mandate...**

(Top 2: very / somewhat familiar)

<b>CFIA mandate</b>	<b>79%</b>
Traceability requirements	85%
Mitigating risks to food safety	84%
Protect the natural environment from plant diseases/pests	58%
Protect the natural environment from invasive species	55%
Protect environmental biodiversity	48%
Preventing animal health risks/ zoonotic diseases	35%
Improving plant resource program designs/delivery	35%
Humane transportation of animals	30%
Improving animal health program designs/delivery	29%

## Impact of COVID

(Top 2: '4 or 5' rating on a 5-point scale)

Prior to COVID, company was growing	70%
My main competitors would likely feel the same impact of COVID on their operations	57%
Since COVID, company has had to make significant changes to survive	44%
Since COVID, company has been growing	38%
Since COVID, company has started to or increased selling to customers via online channels	38%
COVID has benefitted the company	37%
Company has been negatively affected by COVID	35%
COVID has given my competitors an advantage	16%
COVID has caused my company to completely shut down	15%

### Figure 2.2:

Refer to Appendix for the questions. (+X) indicates over (above 115) and (-X) is under (below 85) indexing against the total. (+) and (-) indicate significant differences at 95% CL vs. total sample.

## Opinion about regulations / CFIA

(Top 2: '4 or 5' rating on a 5-point scale)

CFIA regulations are designed and implemented to keep Canadians safe	92% (+)
Complying with CFIA regulations are in our own best interest	91%
Understands the reason why CFIA regulations are in place	89%

CFIA regulation are implemented fairly to all businesses	73% (+)
CFIA regulations are based on common sense	70% (+)
Not enough resources to ensure implementation of CFIA regulations perfectly always	29%
CFIA regulations are very complicated	25% (-)
Too much regulation by the CFIA	15% (-)
Too many employees to ensure implementation of CFIA regulations perfectly always	13%
Implementing CFIA regulations is too expensive	11% (-)

**Organizational attitudes (top 5 based on index)**

**Over indexing:**

Company sells products to customers online	38% (+191)
Long term plan affected by daily operations	31% (+127)
Most important decisions made by one/ small group	85% (+103)
Support local company whenever possible	77% (+96)

**Under indexing:**

Company revenue comes from few large customers	25% (-49)
Company conducts business out of Canada	25% (-49)
Important decisions made with large group	23% (-55)

Company has many different divisions/units	13% (-70)
Company sells products across different channels	35% (-73)

**Opinion about regulations / CFIA**  
 (Top 2: '4 or 5' rating on a 5-point scale)

Have confidence in the CFIA	80% (+)
CFIA is a helpful regulatory agency	73%
Representatives are helpful in preventing future non-compliance	70%
Representatives are helpful in providing info on regulations	68%
Representatives are helpful in resolving existing issues	66%
Company is able to find specific info about CFIA regulations quickly and easily	52%

**Food safety compliance attitudes**  
 (Top 2: '4 or 5' rating on a 5-point scale)

Proud of our compliance record	79% (-)
Complying with CFIA regulation is a concern, but we are confident we do	73% (-)
Very concerned about complying with CFIA regulations	65% (-)
Not concerned about potential business suspension for not complying with CFIA regulations *	51% (+)
Complying with CFIA regulation requires our constant attention	48% (-)
Considers potential financial ramifications for not complying with CFIA regulations as part of the "cost of doing business"	32%
Not concerned about potential financial implications of not complying with CFIA regulations	31% (+)



Advertise the regulatory measures we have in place to our customers	24% (-)
Regulatory compliance record is not important to our customers	19%
Frequently communicates with the CFIA regarding our industry's specific needs	14% (-)
Regulatory compliance record is not important to us	12% (+)

**Figure 2.3:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample. Caution: base too small.

**4% (-)** experienced a sanction/regulatory response due to non-compliance.

**67%** faced financial impact of the sanction.\*

**56%** faced impact on the corporate reputation.\*

**11%** faced business closure due to the sanction.\*

**11%** implemented new HR-related initiatives.\*

**38%** of Emerging Businesses estimated a rate of 100% compliance on a regular day when inspection is not inspected.

**Inspector provided information to avoid future non-compliance?\***

Yes	78%
No	22%

**Regulatory response was from...\***

CFIA	67%
International regulators	22%
Provincial regulators	11%
Client/customer-specific regulators	0% (-)
Internal corporate regulators	0%

**Compliance likelihood if inspected today**

Very likely	80%
Somewhat likely	19%

Not very likely	1%
Not at all likely	1%

### Top 5 methods of communication for receiving information from CFIA

E-mail	77%
CFIA website	52%
Portal notice in My CFIA	23% (-)
In-person visits from CFIA representative	18% (-)
Telephone	17%

### Effectiveness of communication in understanding the regulations

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	67%
CFIA website	52%
In-person visits from CFIA representative	43% (-)
Telephone	39%
Mailed documents	37%

### Effectiveness of communication in driving compliance

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	61%
CFIA website	48%
In-person visits from CFIA representative	40% (-)
Telephone	35% (-)
Mailed documents	33%

### CFIA inspection frequency

More often than monthly	2% (-)
Monthly or every 2 months	5%
Semi-annually	11%
Annually	23%
Less than annually	30%
Not applicable	29% (+)

### Perception of fair treatment\*

Top 2 (fair or somewhat fair)	78%
Fair	33%
Somewhat fair	44%
Somewhat unfair	11%
Unfair	11%

### Section footnotes:

2.1: Base: Emerging Businesses: N=248; Questions: S2, X1-X13, B1-B3, S3, A2

2.2: Base: Emerging Businesses N=248; Questions: S2, D1-D3, A1

2.3: Base: Emerging Businesses N=248; Questions: S2, C2, C3B, C7, C8, C1, C4-C6;

\*Base: Those who have been sanctioned N=9; Questions: C3C, C3E, C3F

### Conventional Corporate Utilitarians:

The firmographic profile of Conventional Corporate Utilitarians is very distinct: these skew towards large businesses with several hundred employees, and most (51%) have been in operations for more than 25 years. The management team is more likely to consist of men, and about 1/3 of these businesses have operations in the United States. The large and longstanding nature of these businesses means that they are more likely to have a department dedicated to food safety compliance, written statements about their commitment to meeting food safety regulations, and a formal process to ensure they remain in compliance with regulations. These businesses are familiar with the CFIA, its mandate, and how it operates, but also seem keenly observant of things that could directly impact its own operations (for example, client-specific quality requirements, international product/quality standards). Regarding the impact of COVID, these businesses do feel like the pandemic has impacted their business negatively, but they do not feel like they are at a disadvantage versus their competitors, and perhaps as a function of their longstanding nature, have not switched focus to selling to customers more online (Figure 3.1).

As larger businesses, Conventional Corporate Utilitarians are more likely to have more bureaucratic complexity (that is, many different divisions or business units, sell products across many different channels) and their decision-making often happens through consensus across a large group. Since these organizations are accustomed to dealing with a high degree of complexity, their attitudes towards the CFIA are best considered in this context: these businesses feel like CFIA regulations are 'too complicated' and are 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. Furthermore, Conventional Corporate Utilitarians believe that their customers care very much about food safety compliance, so they are dedicated to preserving their compliance record

and will often advertise their compliance record or the measures that they have in place to remain compliant. When it comes to food safety regulation and compliance, these are “highly engaged” stakeholders that will often be members of industry associations and communicate specific industry needs to the CFIA (Figure 3.2).

As large and longstanding businesses, Conventional Corporate Utilitarians are inspected most frequently in comparison to other segments, but they also have high confidence that they will be found in compliance if inspected today without notice (98% said that compliance likelihood would be “very likely” or “somewhat likely”). Since these businesses are inspected most often, they are more likely to have received information from an in-person visit by a CFIA representative, and this visit has a tendency to be highly effective in driving future compliance. These businesses are also likely to have received communication from an industry association, perhaps as a result of their larger size and ‘older’ business age, but also a signal of them being “highly engaged” in regulatory matters that concern them (Figure 3.3).

**Figure 3.1:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample.

**Segment size:** 32%

**Business line:** 87% food business, 21% plant health business, 20% animal health business

<b>Profile</b>	
Average number of employees	205.6
Average annual revenue	22.1 million (+)
Duration of operation	More than 25 years (51%) (+)
Duration of operation (food safety)	More than 5 years – less than 25 years (43%)
Region of business activity	US (34%) (+)
Region where CFIA regulations apply	West (40%)
Ownership	Privately held (85%)
Headquarter	Canada (90%)
Hours of operation	Weekdays 9am-5pm (51%)

Busiest time of the week	Weekdays, during the day (87%) (+)
Busiest time of the year	Consistent year-round (29%)
Indigenous owned	No (88%)
% senior management	Male (70.1%) (+)

### Organization regulation structure

Written statements	85% (+)
Employees for quality control in production	83% (+)
Process to ensure compliance standards are met	80% (+)
Employee for regulation compliance	80% (+)
On-the-job training	73% (+)
Division to manage regulatory compliance	58% (+)
Formal training	57% (+)

### Level of confidence in understanding CFIA regulations

<b>Top 2</b> (very or somewhat confident)	84%
Very confident	34%
Somewhat confident	50%
Neutral	12%
Not very confident	2% (-)
Not confident at all	1%

### Familiarity with...

(Top 2: very / somewhat familiar)

Client specific quality requirements	93% (+)
Role of CFIA inspectors	86%
Where to find information about CFIA regulations	83%
Way CFIA operates	81% (+)
International product/ quality standards	75% (+)

**Familiarity with CFIA mandate...**

(Top 2: very / somewhat familiar)

<b>CFIA mandate</b>	<b>83%</b>
Traceability requirements	90%
Mitigating risks to food safety	86%
Protect the natural environment from invasive species	58%
Protect the natural environment from plant diseases/pests	58%
Protect environmental biodiversity	55%
Improving plant resource program designs/delivery	38%
Preventing animal health risks/ zoonotic diseases	37%
Humane transportation of animals	34%
Improving animal health program designs/delivery	28%

**Impact of COVID**

(Top 2: '4 or 5' rating on a 5-point scale)

Prior to COVID, company was growing	67%
My main competitors would likely feel the same impact of COVID on their operations	62%

Since COVID, company has had to make significant changes to survive	43%
Since COVID, company has been growing	32%
Company has been negatively affected by COVID	32%
COVID has benefitted the company	27% (-)
Since COVID, company has started to or increased selling to customers via online channels	17% (-)
COVID has caused my company to completely shut down	13%
COVID has given my competitors an advantage	9% (-)

**Figure 3.2:**

Refer to Appendix for the questions. (+X) indicates over (above 115) and (-X) is under (below 85) indexing against the total. (+) and (-) indicate significant differences at 95% CL vs. total sample.

**Opinion about regulations / CFIA**

(Top 2: '4 or 5' rating on a 5-point scale)

Complying with CFIA regulations are in our own best interest	92% (+)
Understands the reason why CFIA regulations are in place	86%
CFIA regulations are designed and implemented to keep Canadians safe	84%
CFIA regulation are implemented fairly to all businesses	54%
CFIA regulations are very complicated	47% (+)

CFIA regulations are based on common sense	45% (-)
Too much regulation by the CFIA	36%
Not enough resources to ensure implementation of CFIA regulations perfectly always	31%
Implementing CFIA regulations is too expensive	28%
Too many employees to ensure implementation of CFIA regulations perfectly always	12%

**Organizational attitudes (top 5 based on index)**

**Over indexing:**

Company conducts business out of Canada	54% (+216)
Company revenue comes from few large customers	55% (+215)
Company has many different divisions/units	22% (+173)
Important decisions made with large group	35% (+154)
Company sells products across different channels	49% (+137)

**Under indexing:**

Company sells products to customers online	22% (-49)
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**Opinion about regulations / CFIA**  
(Top 2: '4 or 5' rating on a 5-point scale)

Have confidence in the CFIA	73%
CFIA is a helpful regulatory agency	73%



Representatives are helpful in providing info on regulations	68%
Representatives are helpful in preventing future non-compliance	68%
Representatives are helpful in resolving existing issues	64%
Company is able to find specific info about CFIA regulations quickly and easily	45% (-)

**Food safety compliance attitudes**

(Top 2: '4 or 5' rating on a 5-point scale)

Proud of our compliance record	95% (+)
Very concerned about complying with CFIA regulations	86% (+)
Complying with CFIA regulation is a concern, but we are confident we do	86% (+)
Complying with CFIA regulation requires our constant attention	82% (+)
Advertise the regulatory measures we have in place to our customers	51% (+)
Frequently communicates with the CFIA regarding our industry's specific needs	40% (+)
Considers potential financial ramifications for not complying with CFIA regulations as part of the "cost of doing business"	33%
Regulatory compliance record is not important to our customers	10% (-)
Not concerned about potential business suspension for not complying with CFIA regulations *	6% (-)
Not concerned about potential financial implications of not complying with CFIA regulations	5% (-)
Regulatory compliance record is not important to us	3% (-)

**Figure 3.3:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample.

10% experienced a sanction/regulatory response due to non-compliance.

49% implemented new HR-related initiatives.\*

41% faced financial impact of the sanction.\*

24% faced business closure due to the sanction.\*

22% faced impact on the corporate reputation.\*

45% of Conventional Corporate Utilitarians estimated a rate of 90 to 95% compliance on a regular day when inspection is not inspected.

#### Inspector provided information to avoid future non-compliance?\*

Yes	84%
No	16%

#### Regulatory response was from...\*

CFIA	84%
Provincial regulators	8%
Client/customer-specific regulators	5%
International regulators	3%
Internal corporate regulators	0%

#### Compliance likelihood if inspected today

Very likely	81%
Somewhat likely	17%
Not very likely	1%
Not at all likely	1%

#### Top 5 methods of communication for receiving information from CFIA

E-mail	85%
CFIA website	57%
In-person visits from CFIA representative	38% (+)
Portal notice in My CFIA	31%
Industry association	26% (+)

#### Effectiveness of communication in understanding the regulations

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	63%
In-person visits from CFIA representative	56%
Telephone	46%
CFIA website	46%
Industry association	38%

### Effectiveness of communication in driving compliance

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	66%
In-person visits from CFIA representative	60% (+)
Telephone	49%
CFIA website	46%
Mailed documents	36%

### CFIA inspection frequency

More often than monthly	12% (+)
Monthly or every 2 months	4%
Semi-annually	14%
Annually	27%
Less than annually	24%
Not applicable	18%

### Perception of fair treatment\*

<b>Top 2</b> (fair or somewhat fair)	59%
Fair	24%
Somewhat fair	35%
Somewhat unfair	32%
Unfair	8%

### Section footnotes:

3.1: Base: Conventional Corporate Utilitarians N=368; Questions: S2, X1-X13, B1-B3, S3, A2

3.2: Base: Conventional Corporate Utilitarians N=368; Questions: S2, D1-D3, A1

3.3: Base: Conventional Corporate Utilitarians N=368; Questions: S2, C2, C3B, C7, C8, C1, C4-C6;

\*Base: Those who have been sanctioned N=37; Questions: C3C, C3E, C3F

### **Regulation Resisters:**

Regulation Resisters tend to be smaller in terms of employee count and revenues, and more domestically-focused, with their headquarters located in Canada. As smaller companies, their organizational structure related to food safety compliance is small, with businesses much less likely to have divisions or departments dedicated to food safety regulatory compliance or formal processes to ensure the company remains up-to-date on compliance standards. These businesses have very low familiarity with the CFIA, especially with regard to the CFIA's mandate or the way that the CFIA operates. 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 (Figure 4.1)

In terms of the broader organizational attitudes of Regulation Resisters, these businesses seem to have more trouble with planning, with almost half reporting that their long-term planning is impacted by their day-to-day operations. The company culture of these businesses is perceived as "less progressive" and they tend to not be very focused on environmentalism, and decision-making tends to be concentrated to one or a small number of stakeholders. More specifically, these businesses do not believe the CFIA to be a helpful regulatory agency, believing food safety regulations to be too plentiful, complicated, and expensive to implement. Correspondingly, these businesses do not perceive complying with CFIA regulations to be very important to them or their customers, and therefore have relatively less concern regarding compliance. (Figure 4.2).

These businesses generally have an adversarial disposition towards the CFIA, with significantly fewer feeling that they have been treated fairly by the CFIA when compared to the other segments. Considering this disposition and their lack of concern regarding food safety regulation, it is no surprise that Regulation Resisters are also least confident in their compliance: when asked to evaluate likelihood of compliance, this segment featured the lowest proportion of respondents who answered "very likely" (only 63%, compared to 84% average response rate across the other 3 segments), and highest proportion that answered "not very likely" or "not at all likely". These businesses were less likely to report receiving information from any method of communication that the CFIA uses, and are especially unlikely to access the CFIA website or portal notices through My CFIA. (Figure 4.3)

### **Figure 4.1:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample.

**Segment size:** 21%

**Business line:** 89% food business, 20% plant health business, 19% animal health business

<b>Profile</b>	
Average number of employees	82.0 (-)
Average annual revenue	11.1 million (-)
Duration of operation	More than 25 years (42%)
Duration of operation (food safety)	More than 5 years – less than 25 years (46%)
Region of business Activity	West (54%)
Region where CFIA regulations apply	West (42%)
Ownership	Privately held (86%)
Headquarter	Canada (95%) (+)
Hours of operation	Weekdays 9am-5pm (45%)
Busiest time of the week	Weekdays, during the day (74%)
Busiest time of the year	Summer (34%)
Indigenous owned	No (91%)
% senior management	Male (64.4%)

### **Organization regulation structure**

Employees for quality control in production	70% (-)
Written statements	65% (-)
Employee for regulation compliance	62% (-)
On-the-job training	58% (-)

Process to ensure compliance standards are met	55% (-)
Formal training	39% (-)
Division to manage regulatory compliance	35% (-)

### Level of confidence in understanding CFIA regulations

<b>Top 2</b> (very or somewhat confident)	57% (-)
Very confident	16% (-)
Somewhat confident	40%
Neutral	25% (+)
Not very confident	14% (+)
Not confident at all	5% (+)

### Familiarity with...

(Top 2: very / somewhat familiar)

Client specific quality requirements	74% (-)
Role of CFIA inspectors	72% (-)
Where to find information about CFIA regulations	66% (-)
Way CFIA operates	53% (-)
International product/ quality standards	51% (-)

### Familiarity with CFIA mandate...

(Top 2: very / somewhat familiar)

<b>CFIA mandate</b>	<b>64% (-)</b>
Traceability requirements	83% (-)
Mitigating risks to food safety	77% (-)

Protect the natural environment from plant diseases/pests	52%
Protect the natural environment from invasive species	52%
Protect environmental biodiversity	45% (-)
Preventing animal health risks/ zoonotic diseases	34%
Humane transportation of animals	33%
Improving plant resource program designs/delivery	31%
Improving animal health program designs/delivery	29%

**Impact of COVID**

(Top 2: '4 or 5' rating on a 5-point scale)

Prior to COVID, company was growing	66%
My main competitors would likely feel the same impact of COVID on their operations	61%
Since COVID, company has had to make significant changes to survive	49%
Company has been negatively affected by COVID	43% (+)
COVID has benefitted the company	37%
Since COVID, company has been growing	30%
Since COVID, company has started to or increased selling to customers via online channels	29%
COVID has given my competitors an advantage	21% (+)
COVID has caused my company to completely shut down	16%

**Figure 4.2:**

Refer to Appendix for the questions. (+X) indicates over (above 115) and (-X) is under (below 85) indexing against the total. (+) and (-) indicate significant differences at 95% CL vs. total sample.

**Opinion about regulations / CFIA**

(Top 2: '4 or 5' rating on a 5-point scale)

CFIA regulations are very complicated	77% (+)
Too much regulation by the CFIA	74% (+)
Complying with CFIA regulations are in our own best interest	62% (-)
Implementing CFIA regulations is too expensive	62% (+)
Understands the reason why CFIA regulations are in place	59% (-)
Not enough resources to ensure implementation of CFIA regulations perfectly always	55% (+)
CFIA regulations are designed and implemented to keep Canadians safe	54% (-)
Too many employees to ensure implementation of CFIA regulations perfectly always	15%
CFIA regulation are implemented fairly to all businesses	14% (-)
CFIA regulations are based on common sense	14% (-)

**Organizational attitudes (top 5 based on index)****Over indexing:**

Long term plan affected by daily operations	46% (+138)
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### Under indexing:

Important decisions made with large group	19% (-63)
Company conducts business out of Canada	33% (-78)
Strong focus on environmentalism	48% (-79)
Company sells products across different channels	34% (-79)
Company culture is progressive	53% (-80)

### Opinion about regulations / CFIA

(Top 2: '4 or 5' rating on a 5-point scale)

Representatives are helpful in providing info on regulations	38% (-)
Have confidence in the CFIA	36% (-)
Representatives are helpful in preventing future non-compliance	35% (-)
Representatives are helpful in resolving existing issues	34% (-)
CFIA is a helpful regulatory agency	29% (-)
Company is able to find specific info about CFIA regulations quickly and easily	26% (-)

### Food safety compliance attitudes

(Top 2: '4 or 5' rating on a 5-point scale)

Complying with CFIA regulation is a concern, but we are confident we do	73%
Proud of our compliance record	66% (-)
Very concerned about complying with CFIA regulations	65% (-)
Complying with CFIA regulation requires our constant attention	59% (-)

Regulatory compliance record is not important to our customers	28% (+)
Advertise the regulatory measures we have in place to our customers	24% (-)
Not concerned about potential business suspension for not complying with CFIA regulations *	21%
Considers potential financial ramifications for not complying with CFIA regulations as part of the “cost of doing business”	19%
Frequently communicates with the CFIA regarding our industry’s specific needs	19% (-)
Not concerned about potential financial implications of not complying with CFIA regulations	17%
Regulatory compliance record is not important to us	15% (+)

**Figure 4.3:**

Refer to Appendix for the questions. (+) and (-) indicate significant differences at 95% CL vs. total sample. Caution: base too small.

7% experienced a sanction/regulatory response due to non-compliance.

44% faced financial impact of the sanction.\*

39% faced impact on the corporate reputation\*.

28% implemented new HR-related initiatives.\*

11% faced business closure due to the sanction.\*

18% (+) of Regulation Resisters estimated a rate of 75 to 89% compliance on a regular day when inspection is not inspected.

**Inspector provided information to avoid future non-compliance?\***

Yes	67%
No	33%

**Regulatory response was from...\***

CFIA	72%
Provincial regulators	11%
International regulators	11%

Client/customer-specific regulators	6%
Internal corporate regulators	0%

### Compliance likelihood if inspected today

Very likely	63% (-)
Somewhat likely	30% (+)
Not very likely	6% (+)
Not at all likely	2%

### Top 5 methods of communication for receiving information from CFIA

E-mail	77%
CFIA website	46% (-)
In-person visits from CFIA representative	26%
Portal notice in My CFIA	19% (-)
Industry association	19%

### Effectiveness of communication in understanding the regulations

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	45%
In-person visits from CFIA representative	35%
CFIA website	31%
Industry association	26%
Telephone	26%

### Effectiveness of communication in driving compliance

(Top 2: '4 or 5' rating on a 5-point scale)

E-mail	44%
In-person visits from CFIA representative	36%
Telephone	32%
CFIA website	31%
Industry association	26%

### CFIA inspection frequency

More often than monthly	9%
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Monthly or every 2 months	6%
Semi-annually	6% (-)
Annually	21%
Less than annually	32%
Not applicable	26%

**Perception of fair treatment\***

<b>Top 2 (fair or somewhat fair)</b>	<b>44%</b>
Fair	11% (-)
Somewhat fair	33%
Somewhat unfair	39%
Unfair	17%

**Section footnotes:**

4.1: Base: Regulation Resisters N=247; Questions: S2, X1-X13, B1-B3, S3, A2

4.2: Base: Regulation Resisters N=247; Questions: S2, D1-D3, A1

4.3: Base: Regulation Resisters N=247; Questions: S2, C2, C3B, C7, C8, C1, C4-C6;

\*Base: Those who have been sanctioned N=18; Questions: C3C, C3E, C3F

## 5.0 Drivers and barriers to compliance

While each of the 4 segments has specific barriers and drivers to compliance as detailed above, there are also some more general observations that can be applied across the entire scope of CFIA regulated industrial parties. These are specific things that the CFIA can focus on in its communications that will help drive improved food safety 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. As such, the CFIA should emphasize to its regulated parties that building an organizational culture around compliance with food safety regulation is a self-fulfilling prophecy. That is, the business needs to be committed to setting the standard for its industry and building a reputation for food safety as a part of its broader commitment to nourishing this “compliance culture” internally. Businesses can be convinced that developing this “compliance culture” is in their best interest, as evidenced by the other 2 top-ranked drivers being “the strength of the business is strongly tied to food safety standards” and “my customers or clients demand that CFIA regulations are met”.

### Figure 5.1: Top 5 drivers and barriers of complying with CFIA regulations

Base:  $N = 1167$ .

Refer to Appendix for the questions.

<b>Drivers</b>	<b>Percentage</b>
We strive to set the standard for quality in our industry	15%
The strength of our business is strongly tied to food safety standards	14%
We have a reputation for food safety	13%
Our company has a culture where regulatory compliance is prioritized	12%
My customers or clients demand that CFIA regulations are met	10%

<b>Barriers</b>	<b>Percentage</b>
There is a lack of understanding about the changes to CFIA regulations	25%
It is very complicated to implement CFIA regulations	16%
There are not enough resources or employees to implement all regulatory protocols	13%

It is very expensive to implement CFIA regulations	11%
Customers or clients do not demand that all CFIA regulations are met	6%
Company does not have a culture where following regulations are prioritized	6%

In terms of key barriers to CFIA regulatory compliance, one barrier stood out clearly as having the most negative impact: almost 25% of businesses indicated 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”, as that will have the greatest impact on improving compliance with regulations. Additional barriers exist that are related to the quantity, cost, or complexity of CFIA regulations, but these were much less important drivers when compared to a lack of understanding regarding changes to CFIA regulations.

Finally, analysis is provided for top barriers and drivers to complying with CFIA regulations by business line (food, plant, or animal). The number of respondents included in animal and plant health businesses are small and need to be interpreted with caution, but most of the data regarding barriers and drivers is remarkably consistent across business lines. There are only a few noteworthy exceptions regarding barriers to compliance: businesses that are regulated by animal health and plant health regulations are less likely to report a lack of resources that would prevent them from complying with CFIA regulations, and businesses regulated by federal plant health regulation are also unlikely to report that implementing CFIA regulations are too expensive.

**Figure 5.2: Top 5 drivers and barriers for complying with CFIA regulations**

Base: Net food businesses: N = 1042, Net animal health businesses: N = 210, Net plant health businesses N = 204.

Note: (+) and (-) indicates significant differences at 95% CL vs. total sample.

Drivers	Type of business	Percentage
The strength of our business is strongly tied to food safety standards	Net food businesses	14%
	Net animal health businesses	13%
	Net plant health businesses	8%
We strive to set the standard for quality in our industry	Net food businesses	13%
	Net animal health businesses	18%
	Net plant health businesses	23%
We have a reputation for food safety	Net food businesses	13%
	Net animal health businesses	9%
	Net plant health businesses	11%
Our company has a culture where regulatory compliance is prioritized	Net food businesses	11%
	Net animal health businesses	18%
	Net plant health businesses	18%

My customers or clients demand that CFIA regulations are met	Net food businesses	10%
	Net animal health businesses	10%
	Net plant health businesses	6%
We are concerned about losing business/sales/customers as a result of CFIA non-compliance	Net food businesses	8%
	Net animal health businesses	10%
	Net plant health businesses	10%
Complying with CFIA regulations is simple	Net food businesses	6%
	Net animal health businesses	4%
	Net plant health businesses	12%

<b>Barriers</b>	<b>Type of business</b>	<b>Percentage</b>
There is a lack of understanding about the changes to CFIA regulations	Net food businesses	24%
	Net animal health businesses	23%
	Net plant health businesses	28%
It is very complicated to implement CFIA regulations	Net food businesses	16%
	Net animal health businesses	18%
	Net plant health businesses	16%
There are not enough resources or employees to implement all regulatory protocols	Net food businesses	14%
	Net animal health businesses	9% (-)
	Net plant health businesses	5% (-)
It is very expensive to implement CFIA regulations	Net food businesses	12%
	Net animal health businesses	13%
	Net plant health businesses	6% (-)
Customers or clients do not demand that all CFIA regulations are met	Net food businesses	6%
	Net animal health businesses	4%
	Net plant health businesses	10%
Company does not have a culture where following regulations are prioritized	Net food businesses	6%
	Net animal health businesses	7%
	Net plant health businesses	5%
The financial impact that we've experienced in the past is not significant or is considered "part of doing business"	Net food businesses	5%
	Net animal health businesses	9%
	Net plant health businesses	4%
CFIA enforcement activities do not impact our decision-making	Net food businesses	3%
	Net animal health businesses	1%
	Net plant health businesses	5%

## 6.0 CFIA communication effectiveness

While each segment is distinct in both its disposition towards communicating with the CFIA as well as the methods it prefers to use to communicate with the CFIA, there are also some more general observations that are valuable when looking across all CFIA federally-regulated parties. Below provides an overview of the most common methods of communication that are used today by businesses that are regulated by the CFIA.

**Figure 6.1:**

Base: Total Sample N = 1167.

### Methods of communication for receiving information from CFIA

Method	Percentage
E-mail	82%
CFIA website	53%
In-person visits from CFIA representative	30%
Portal notice in My CFIA	29%
Through an industry association	19%
Telephone	19%
Mailed documents	13%

### Effectiveness of communication in understanding the regulations

Method	Percentage
E-mail	65%
In-person visits from CFIA representative	51%
CFIA website	49%
Telephone	42%
Portal notice in My CFIA	37%
Through an industry association	34%
Mailed documents	34%

### Effectiveness of communication in driving compliance

Method	Percentage
E-mail	64%
In-person visits from CFIA representative	52%
CFIA website	48%
Telephone	43%
Portal notice in My CFIA	35%
Mailed documents	35%
Through an industry association	33%



Most (82%) respondents included in this study 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 in 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 in improving their understanding of regulations or driving compliance.

A few communication methods were utilized less frequently, but should be highlighted since they tended to drive relatively stronger levels of understanding and compliance. In-person visits from a CFIA representative were reported as the second most effective method to drive understanding and compliance, despite only 30% of the sample having interactions with a CFIA representative. Telephone calls were also not very frequently used as a method of communication, but resulted in a high degree of understanding and were generally thought to be more effective at driving compliance than many other methods.

## 7.0 Appendices

### 7.1 Top drivers and barriers to compliance by segments

Note: (+) and (-) indicates significant differences at 95% CL vs. total sample.

#### Top 5 drivers for complying with CFIA regulations (rank top 3)

Driver	Segment	Percentage
We have a reputation for food safety	Regulation Embracers	41% (+)
	Emerging Businesses	29%
	Conventional Corporate Utilitarians	34%
	Regulation Resisters	27%
We strive to set the standard for quality in our industry	Regulation Embracers	33%
	Emerging Businesses	27%
	Conventional Corporate Utilitarians	36%
	Regulation Resisters	26%
The strength of our business is strongly tied to food safety standards	Regulation Embracers	39%
	Emerging Businesses	34%
	Conventional Corporate Utilitarians	34%
	Regulation Resisters	25% (-)
We are concerned about losing our licence as a result of food safety non-compliance	Regulation Embracers	18%
	Emerging Businesses	16%
	Conventional Corporate Utilitarians	20%
	Regulation Resisters	24%
Our company has a culture where regulatory compliance is prioritized	Regulation Embracers	36% (+)
	Emerging Businesses	25%
	Conventional Corporate Utilitarians	30%
	Regulation Resisters	20% (-)
We are concerned about losing business/sales/customers as a result of CFIA non-compliance	Regulation Embracers	20%
	Emerging Businesses	15% (-)
	Conventional Corporate Utilitarians	27% (+)
	Regulation Resisters	20%
My customers or clients demand that CFIA regulations are met	Regulation Embracers	22%
	Emerging Businesses	20%
	Conventional Corporate Utilitarians	23%
	Regulation Resisters	13% (-)

#### Top 5 barriers for complying with CFIA regulations (rank top 3)

Barrier	Segment	Percentage
It is very complicated to implement CFIA regulations	Regulation Embracers	15% (-)
	Emerging Businesses	21% (-)
	Conventional Corporate Utilitarians	34%

	Regulation Resisters	52% (+)
There is a lack of understanding about the changes to CFIA regulations	Regulation Embracers	39%
	Emerging Businesses	44%
	Conventional Corporate Utilitarians	43%
	Regulation Resisters	45%
There are not enough resources or employees to implement all regulatory protocols	Regulation Embracers	26%
	Emerging Businesses	22% (-)
	Conventional Corporate Utilitarians	31%
	Regulation Resisters	38% (+)
It is very expensive to implement CFIA regulations	Regulation Embracers	16% (-)
	Emerging Businesses	18% (-)
	Conventional Corporate Utilitarians	27%
	Regulation Resisters	37% (+)
Customers or clients do not demand that all CFIA regulations are met	Regulation Embracers	12%
	Emerging Businesses	17%
	Conventional Corporate Utilitarians	10%
	Regulation Resisters	16%
Company does not have a culture where following regulations are prioritized	Regulation Embracers	22% (+)
	Emerging Businesses	11%
	Conventional Corporate Utilitarians	11%
	Regulation Resisters	4% (-)

### Top 5 drivers for complying with CFIA regulations (rank top 2)

Driver	Segment	Percentage
The strength of our business is strongly tied to food safety standards	Regulation Embracers	30%
	Emerging Businesses	26%
	Conventional Corporate Utilitarians	26%
	Regulation Resisters	20%
We have a reputation for food safety	Regulation Embracers	27%
	Emerging Businesses	21%
	Conventional Corporate Utilitarians	26%
	Regulation Resisters	20%
We strive to set the standard for quality in our industry	Regulation Embracers	22%
	Emerging Businesses	21%
	Conventional Corporate Utilitarians	29% (+)
	Regulation Resisters	19%
We are concerned about losing our licence as a result of food safety non-compliance	Regulation Embracers	13%
	Emerging Businesses	13%
	Conventional Corporate Utilitarians	15%
	Regulation Resisters	19%
Our company has a culture where regulatory compliance is prioritized	Regulation Embracers	28% (+)
	Emerging Businesses	20%
	Conventional Corporate Utilitarians	22%
	Regulation Resisters	15%

We are concerned about losing business/sales/customers as a result of CFIA non-compliance	Regulation Embracers	15%
	Emerging Businesses	12%
	Conventional Corporate Utilitarians	18%
	Regulation Resisters	15%
Complying with CFIA regulations is simple	Regulation Embracers	9%
	Emerging Businesses	15% (+)
	Conventional Corporate Utilitarians	6% (-)
	Regulation Resisters	13%
My customers or clients demand that CFIA regulations are met	Regulation Embracers	16%
	Emerging Businesses	14%
	Conventional Corporate Utilitarians	18%
	Regulation Resisters	10% (-)

**Top 5 barriers for complying with CFIA regulations (rank top 2)**

Barrier	Segment	Percentage
It is very complicated to implement CFIA regulations	Regulation Embracers	13% (-)
	Emerging Businesses	18% (-)
	Conventional Corporate Utilitarians	29%
	Regulation Resisters	43% (+)
There is a lack of understanding about the changes to CFIA regulations	Regulation Embracers	36%
	Emerging Businesses	39%
	Conventional Corporate Utilitarians	37%
	Regulation Resisters	32%
There are not enough resources or employees to implement all regulatory protocols	Regulation Embracers	21%
	Emerging Businesses	17%
	Conventional Corporate Utilitarians	24%
	Regulation Resisters	30% (+)
It is very expensive to implement CFIA regulations	Regulation Embracers	13% (-)
	Emerging Businesses	13% (-)
	Conventional Corporate Utilitarians	22%
	Regulation Resisters	28% (+)
Customers or clients do not demand that all CFIA regulations are met	Regulation Embracers	9%
	Emerging Businesses	14%
	Conventional Corporate Utilitarians	7%
	Regulation Resisters	10%
Company does not have a culture where following regulations are prioritized	Regulation Embracers	17% (+)
	Emerging Businesses	9%
	Conventional Corporate Utilitarians	8%
	Regulation Resisters	3% (-)

## 7.2 Response rate

### Canadian response rate

	<b>Total</b>	<b>Percentage</b>
<b>Generated</b>	3946	100.0
<b>Used</b>	3946	100.0
Not in service	360	9.1
Not residential	9	0.2
Line problem	2	0.1
Fax	15	0.4
Wrong number	83	2.1
<b>A. not valid<sup>1</sup></b>	469	11.9
<b>Valid</b>	3477	88.1
Not eligible	267	7.7
Language barrier	29	0.8
Age – illness	0	0.0
Other	34	1.0
<b>B. out of sample<sup>2</sup></b>	330	8.4
<b>Sample<sup>3</sup></b>	3147	79.8
C. household refusal	217	6.9
C. multiple household refusal	0	0.0
D. respondent refusal	262	8.3
D. multiple respondent refusal	0	0.0
D. final refusal	9	0.3
D. prolonged absence	38	1.2
D. incomplete	0	0.0
D. no answer	1120	35.6
D. appointments	730	23.2
Quota blocked	0	0.0
<b>Completed interviews</b>	771	24.5

<b>% refusal<sup>4</sup></b>	15.5%
<b>% completed<sup>5</sup></b>	24.5%
<b>Eligibility rate<sup>6</sup></b>	84.6%
<b>Response rate<sup>7</sup></b>	26.2%

<sup>1</sup> No possible contacts under these numbers

<sup>2</sup> Respondents were not eligible or were unable to answer

<sup>3</sup> Usable numbers

<sup>4</sup> Refusal / sample

<sup>5</sup> Completed / sample

<sup>6</sup> (D + completed + quota blocked) / (B + D + completed + quota blocked)

<sup>7</sup> (Completed + quota blocked) / (C\*(E.R.) + D + completed + quota blocked)

### 7.3 Sample profile (s2, x1-x13)

Specific profiling details of the sample used for the report are detailed below in table form, which outlines the differences across the 3 lines of industry; food, animal and plant. Significance testing is shown by column letters indicating that a value is significantly higher than another at a 95% confidence interval.

**Q. S2 What industry segments does your company operate in? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
<b>(Net) food businesses</b>	1042	1042	171	108
	89%	100%	81%	53%
	CD	ACD	D	
Food preparation	178	178	28	10
	15%	17%	13%	5%
	D	D	D	
Food importing	409	409	59	20
	35%	39%	28%	10%
	CD	ACD	D	
Food exporting	279	279	68	35
	24%	27%	32%	17%
	D	D	AD	
Interprovincial trade of food	222	222	42	25
	19%	21%	20%	12%
	D	D	D	
Food manufacturing	326	326	45	14
	28%	31%	21%	7%
	CD	CD	D	
Farming	205	205	56	65
	18%	20%	27%	32%
			AB	AB
Food/beverage manufacturing or processing	224	224	34	19
	19%	21%	16%	9%
	D	D	D	
Meat and poultry slaughter	32	32	16	2
	3%	3%	8%	1%
	D	D	ABD	
	124	124	38	22

Other food business	11%	12%	18%	11%
			ABD	

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
<b>(Net) animal health businesses</b>	210	171	210	41
	18%	16%	100%	20%
			ABD	
Live animal importing (terrestrial or aquatic)	52	38	52	8
	4%	4%	25%	4%
			ABD	
Live animal exporting (terrestrial or aquatic)	37	28	37	4
	3%	3%	18%	2%
			ABD	
Animal product or by-product importing	53	41	53	10
	5%	4%	25%	5%
			ABD	
Animal product or by-product exporting	41	35	41	8
	4%	3%	20%	4%
			ABD	
Live animal domestic management (e.g. producers, assembly yards, includes terrestrial and aquatic)	38	35	38	4
	3%	3%	18%	2%
			ABD	
Animal product or by-product preparation or manufacture	38	35	38	2
	3%	3%	18%	1%
	D	D	ABD	
Animal feed	18	12	18	8
	2%	1%	9%	4%
			ABD	B
Animal transportation	14	13	14	2
	1%	1%	7%	1%
			ABD	
Veterinary biologics	9	6	9	3
	1%	1%	4%	1%
			AB	

Other animal health business	42	34	42	18
	4%	3%	20%	9%
			ABD	AB

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
<b>(Net) plant health businesses</b>	204	108	41	204
	17%	10%	20%	100%
	B		B	ABC
Fertilizers and supplements	23	10	6	23
	2%	1%	3%	11%
	B			ABC
Forestry products	18	7	2	18
	2%	1%	1%	9%
	B			ABC
Horticulture (greenhouse, nursery, bulbs, fruit, trees, grapevines)	82	35	5	82
	7%	3%	2%	40%
	BC			ABC
Crops (grains, oilseeds)	34	23	10	34
	3%	2%	5%	17%
				ABC
Potatoes	32	26	2	32
	3%	2%	1%	16%
	C			ABC
Seed growing (other than seed potato)	14	6	2	14
	1%	1%	1%	7%
				ABC
Seed establishments / handling	16	8	4	16
	1%	1%	2%	8%
				ABC
Plant breeding	17	6	2	17
	1%	1%	1%	8%
	B			ABC
Plant breeders' rights (intellectual property)	13	4	1	13
	1%	0%	0%	6%
	B			ABC
Invasive species prevention and management	7	5	4	7
	1%	0%	2%	3%
				AB
	50	30	35	50



Other plant health business	4%	3%	12%	25%
			AB	ABC

**Q.X1 Approximately how many people are employed in your company? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Sole proprietor / just me	107	91	21	20
	9%	9%	10%	10%
2 to 9 employees	425	393	87	53
	36%	38%	41%	26%
	D	D	D	
10 to 49 employees	355	313	56	70
	30%	30%	27%	34%
50 to 99 employees	119	106	15	22
	10%	10%	7%	11%
100 to 499 employees	111	94	14	28
	10%	9%	7%	14%
				C
500 to 999 employees	17	16	4	4
	1%	2%	2%	2%
1000 to 4999 employees	19	16	7	3
	25	2%	3%	1%
5000+ employees	14	13	6	4
	1%	1%	3%	2%
Mean	176.8	176.6	318.9	239.7
Std dev	771.3	780.7	1153.7	941.9
Std err	22.58	24.18	79.62	65.94

**Q.X2 What is the approximate annual revenue of your company? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Less than \$100,000	141	125	32	19
	12%	12%	15%	9%
\$100,000 to \$499,999	171	155	30	24
	15%	15%	14%	12%
\$500,000 to \$999,999	133	122	27	17
	11%	12%	13%	8%
\$1 million to less than \$25 million	448	397	66	94
	38%	38%	31%	46%
	C			ABC
\$25 million to less than \$100 million	75	68	20	13
	6%	7%	10%	6%
\$100 million or more	39	37	11	5
	3%	4%	5%	2%
I don't know / prefer not to answer	160	138	24	32
	14%	13%	11%	16%
Mean in millions	16.4	16.7	20.4	16.3
Std dev	31.1	31.8	37.4	27.8
Std err	0.98	1.06	2.74	2.12

**Q.X3 How long has your company been in operations? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Less than a year	26	21	5	6
	2%	2%	2%	3%
Between 1-5 years	182	164	34	22
	16%	16%	16%	11%
	D	D		

More than 5 years but less than 10 years	120	115	14	6
	10%	11%	7%	3%
	D	CD		
More than 10 years but less than 25	312	282	60	51
	27%	27%	29%	25%
More than 25 years	521	455	95	118
	45%	44%	45%	58%
				ABC
Not sure	6	5	2	1
	1%	0%	1%	0%
Mean years	23.9	23.6	24.3	28.2
				ABC
Std dev	15.4	15.3	15.3	14.6
Std err	0.45	0.48	1.06	1.03

**Q.X4 How long has your company operated in functions that involved food safety? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Less than a year	51	44	12	10
	4%	4%	6%	5%
Between 1-5 years	206	192	30	20
	18%	18%	14%	10%
	D	D		
More than 5 years but less than 10 years	153	145	28	19
	13%	14%	13%	9%
		D		
More than 10 years but less than 25	359	339	57	56
	31%	33%	27%	27%
More than 25 years	309	286	63	42
	26%	27%	30%	21%
		D	D	
Not sure	89	36	20	57
	8%	3%	10%	28%
	B		B	ABC
Mean years	19.0	18.9	20.1	19.5
Std dev	14.5	14.5	15.1	14.2
Std err	0.44	0.46	1.09	1.17

**Q.X5 Where does your company currently do business? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
British Columbia	418	364	76	73
	36%	35%	36%	36%
Alberta	377	320	88	73
	32%	31%	42%	36%
Saskatchewan	262	219	60	58
	22%	21%	29%	28%
Manitoba	271	235	65	56
	23%	23%	31%	27%
Ontario	587	523	96	109
	50%	50%	46%	53%
Quebec	451	400	75	87
	39%	38%	36%	43%
New Brunswick	224	199	53	46
	19%	19%	25%	23%
Prince Edward Island	168	148	44	38
	14%	14%	21%	19%
Nova Scotia	239	207	59	49
	20%	20%	28%	24%
Newfoundland and Labrador	151	135	33	33
	13%	13%	16%	16%
Yukon	70	59	20	15
	6%	6%	10%	7%
Nunavut	53	46	18	11
	5%	4%	9%	5%

			AB	
Northwest Territories	58	50	19	12
	5%	5%	9%	6%
			B	
The US	300	254	80	72
	26%	24%	38%	35%
			AB	AB
Outside of Canada or the US	193	170	62	35
	17%	16%	30%	17%
			ABD	

**Q.X6 Where does your company have offices or facilities where CFIA regulations are applicable? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
British Columbia	224	187	39	48
	19%	18%	19%	24%
Alberta	156	129	45	33
	13%	12%	21%	16%
			AB	
Saskatchewan	77	68	25	19
	7%	7%	12%	9%
			AB	
Manitoba	92	81	28	21
	8%	8%	13%	10%
			AB	
Ontario	403	361	59	73
	35%	35%	28%	36%
Quebec	234	213	36	40
	20%	20%	17%	20%
New Brunswick	64	58	14	13
	5%	6%	7%	6%
Prince Edward Island	35	30	8	15
	3%	3%	4%	7%
				AB
Nova Scotia	79	71	24	14
	7%	7%	11%	7%
			AB	

Newfoundland and Labrador	20	20	4	3
	2%	2%	2%	1%
Yukon	7	7	3	3
	1%	1%	1%	1%
Nunavut	6	6	2	3
	1%	1%	1%	1%
Northwest Territories	5	5	2	3
	0%	0%	1%	1%
The US	61	51	13	10
	5%	5%	6%	5%
Outside of Canada or the US	22	20	6	2
	2%	2%	3%	1%

**Q.X7 What is the ownership status of your company? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Publicly traded	45	40	18	12
	4%	4%	9%	6%
			AB	
Privately held	1000	901	172	167
	86%	86%	82%	82%
Government / Crown	13	7	7	5
	1%	1%	3%	2%
			B	
Not sure	109	94	13	20
	9%	9%	6%	10%

**Q.X8 Where is your company based? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
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<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Headquarters in Canada	1070	957	186	192
	92%	92%	89%	94%
				C
Headquarters in United States	60	52	10	8
	5%	5%	5%	4%
Headquarters outside Canada and the US	31	28	12	4
	3%	3%	6%	2%
			D	
Not sure	6	5	2	0
	1%	0%	1%	0%
	D	D		

**Q.X9 What are your company’s regular hours of operation? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Weekdays 9 am to 5 pm	544	484	92	98
	47%	46%	44%	48%
Monday through Saturday	158	144	27	26
	14%	14%	13%	13%
Weekdays & weekends	164	149	29	27
	14%	14%	14%	13%
Open 24 hours / 7 days a week	102	88	31	17
	9%	8%	15%	8%
			ABD	
Other	185	167	26	32
	16%	16%	12%	16%
Not sure	14	10	5	4
	1%	1%	2%	2%

**Q.X10 When is usually your company’s busiest time of the week? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Weekdays during the day	918	818	171	165
	79%	79%	81%	81%
Weekdays during the evening	14	14	1	2
	1%	1%	0%	1%
Weekends, during the day	131	115	19	26
	11%	11%	9%	13%
Weekends, during the evening	16	15	3	2
	1%	1%	1%	1%
Not sure	88	80	16	9
	8%	8%	8%	4%
		D		

**Q.X11 Which of the following best describes your company's busiest time of the year? Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Summer	356	331	53	51
	31%	32%	25%	25%
		CD		
Fall	155	139	27	32
	13%	13%	13%	16%
Winter	93	89	14	11
	8%	9%	7%	5%
Spring	113	72	22	53
	10%	7%	10%	26%
	B			ABC
Holiday occasion(s)	91	87	18	9
	8%	8%	9%	4%
	D	D		
Consistent year-round	323	289	72	47
	28%	28%	34%	23%
			D	



Not sure	36	35	4	1
	3%	3%	2%	0%
	D	D		

**Q.X12 Would you describe your company as Indigenous managed or owned?**  
**Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Yes	54	51	8	2
	5%	5%	4%	1%
	D	D		
No	1037	919	189	189
	89%	88%	90%	93%
				B
Unsure	76	72	13	13
	7%	7%	6%	6%

**Q.X13 Please describe the approximate percentages of individuals with a senior management position who identify as:**

**Base: total respondents. Significance tests at 95%: A/B/C/D.**

	Total (A)	Net food (B)	Net animal health (C)	Net plant health (D)
<b>Total interviews (unweighted)</b>	<b>1167</b>	<b>1042</b>	<b>210</b>	<b>204</b>
Male	65.1	64.9	65.3	68.9
Female	34.7	34.9	34.7	31.1
Other gender	0.2	0.3	0.0	0.0
I don't know	252	219	54	52
	22%	21%	26%	25%

## 7.4 Survey instrument

**Languages:** English, French

**Section:**

Login1, S2, S3

**Page**

**Login1**

<https://www.inspection.gc.ca>)

*Si vous préférez répondre au sondage en français, veuillez cliquer sur le bouton FRANÇAIS ci-dessus.*

Thank you for taking the time to participate in this survey. The objective of this research is to allow you, a CFIA regulated party, an opportunity to provide feedback to the CFIA about your experience with regulations and enforcement. This survey is entirely voluntary, but also in your interest because the results will help inform how the CFIA approaches its mandate. The survey will take approximately 20 minutes to complete.

All of your responses to the survey will be strictly confidential and will be reported only in the aggregate.

If you get interrupted while doing the survey, you **can click on the same link** to pick up right where you left off.

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## S2

What industry segments does your company operate in? Select all that apply

<b>Food businesses:</b>
Food preparation
Food importing
Food exporting
Interprovincial trade of food
Food manufacturing
Farming
Food/beverage manufacturing or processing
Meat and poultry slaughter
Other (specify) _____
<b>Animal health businesses:</b>
Live animal importing (terrestrial or aquatic)
Live animal exporting (terrestrial or aquatic)
Animal product or by-product importing
Animal product or by-product exporting
Live animal domestic management (e.g. producers, assembly yards, includes terrestrial and aquatic)
Animal product or by-product preparation or manufacture
Animal feed
Animal transportation
Veterinary biologics
Other (specify) _____
<b>Plant health businesses:</b>
Fertilizers and supplements
Forestry products
Horticulture (greenhouse, nursery, bulbs, fruit trees, grapevines)
Crops (grains, oilseeds)
Potatoes
Seed growing (other than seed potato)
Seed establishments/ handling
Plant breeding
Plant breeders' rights (intellectual property)
Invasive species prevention and management
Other (specify) _____

## S3

What is your general level of confidence with regards to understanding CFIA regulation at your company?

Very confident
Somewhat confident
Neutral

Not very confident
Not confident at all

**Section:**

A1, A2, B1, B2, B3, C1, C1A, C1B, C1C, C2, C3A, C3B, C3C, C3i, C3ii, C3iii, C3iv, C3v, C3D, C3Df, C3E, C3F, C4, C5, C6, C7, C8, C9

**Page SecA**

**A1**

Below are a number of statements that people might use to describe their company. For each statement, please indicate how much it describes your company. A rating of 5 means it 'Describes my company completely'. A rating of 1 means that it 'Does not describe my company at all'.

The most important decisions are made by one person or a small group of people *
The most important decisions are usually made in consensus across a larger group *
Long-term planning is very important to the company *
The long-term planning of the company is hindered by day-to-day operations *
The company sells products across several different retail/wholesale channels (i.e. grocery, drug, mass merchandiser, club, dollar, etc.) *
The company has many different divisions or business units *
Most of our company revenue comes from a few large customers *
We support local companies whenever possible *
The company is generous in donating to charitable causes *
The company culture is progressive *
We have a strong focus on environmentalism *
We are considered a "leader" within our industry *
The company sells products to customers through online channels *
Our company conducts business outside of Canada *
The company is a member of at least one industry association/trade organization *

*Levels marked with \* are randomized*

5 Describes my company completely
4
3
2
1 Does not describe my company at all

**A2**

Thinking now specifically about the **impact of the COVID-19 pandemic** on your company, please indicate how much the following statements describe your company. A

rating of 5 means it 'Describes my company completely'. A rating of 1 means that it 'Does not describe my company at all'.

Prior to COVID-19, our company was growing *
Since COVID-19, our company has been growing *
Since COVID-19, our company has had to make significant changes in order to survive *
Since COVID-19, our company has either started to or increased selling to customers through online channels *
Overall, our company has been negatively affected by COVID-19 *
The COVID-19 pandemic has benefitted the company in some ways *
The COVID-19 pandemic has given my competitors an advantage *
The COVID-19 pandemic has caused my company to completely shut down (for any length of time) *
My main competitors would likely feel the same impact of COVID-19 on their operations *

*Levels marked with \* are randomized*

5 Describes my company completely
4
3
2
1 Does not describe my company at all

## Page SecB

### B1

Thinking specifically about CFIA regulations in your company, does your company have the following... ?

A division/department or regulatory office that manages regulatory compliance *
An employee responsible for regulation compliance (for example, a regulatory manager) *
Employees involved in the production process who are assigned responsibility for quality control *
Formal training about regulations *
On-the-job training about regulations *
Written statements/documentation about commitment to compliance with CFIA regulatory requirements *
A formal process to ensure the company remains up-to-date on compliance standards and implementation *

*Levels marked with \* are randomized*

Yes
-----

No
----

**B2**

Please select the response that best applies to your company in general (and not you as an individual) about your familiarity with each of the following:

The mandate of the Canadian Food Inspection Agency (CFIA) *
Client or customer-specific quality requirements *
International product or quality standards *
The way the CFIA operates *
The role of CFIA inspectors *
Where to find specific information about CFIA regulations *

*Levels marked with \* are randomized*

Very familiar
Somewhat familiar
Aware but not familiar
Not aware / never heard of before today

**B3**

Please select the response that best applies to your organization for each of the following components of the CFIA's mandate. Please think about your company in general (and not you as an individual).

Mitigating risks to food safety *
Preventing animal health risks and zoonotic diseases *
Improving animal health program designs and delivery *
Improving plant resource program designs and delivery *
Traceability requirements *
Humane transportation of animals *
Protect the natural environment from invasive species *
Protect the natural environment from plant diseases and pests *
Protect environmental biodiversity *

*Levels marked with \* are randomized*

Very familiar
Somewhat familiar
Aware but not familiar
Not aware / never heard of before today

**Page SecC**

**C1**

How often is your company inspected by each of the following organizations?

The Canadian Food Inspection Agency *
---------------------------------------

Municipal regulators *
Provincial regulators *
Client or customer-specific regulators/auditors *
Internal corporate regulators/auditors *
International regulators *

*Levels marked with \* are randomized*

More often than monthly (more than 12 inspections per year)
Monthly or every 2 months (about 6-12 inspections per year)
Semi-annually (about 2 inspections per year)
Annually (1 inspection per year)
Less than annually (more than 1 year between inspections)
Not applicable

**Page** *Show if C1 At Least 2*

**C1A**

When regulations overlap, what standard does your company prioritize?

Rank order any that are applicable.

The Canadian Food Inspection Agency * <i>(Show if C1 Inspect 1)</i>
Municipal regulators * <i>(Show if C1 Inspect 2)</i>
Provincial regulators * <i>(Show if C1 Inspect 3)</i>
Client or customer-specific regulators/auditors * <i>(Show if C1 Inspect 4)</i>
Internal corporate regulators/auditors * <i>(Show if C1 Inspect 5)</i>
International regulators * <i>(Show if C1 Inspect 6)</i>

*Levels marked with \* are randomized*

**C1B**

When regulations overlap, what factors are involved in making the decision to prioritize one set of standards over another? Select all that apply

Economic factors (such as which standards are more affordable in terms of being compliant) *
Customer or client pressures *
Public relations implications *
Feasibility of executing the standard *
Understanding of the regulations *
Frequency or timing of inspections *
Enforcement and the potential for financial exposure/suspension *
Other (specify) _____

*Levels marked with \* are randomized*

**C1C**

Does the presence of overlapping regulations put your company at a disadvantage versus your competitors?

Yes
Somewhat
No

**Page****C2**

Has your company ever experienced a sanction or other regulatory response as a result of non-compliance?

Yes
No

**Page** *Show if C2 Yes*

**C3A**

Thinking back to the most recent time you have experienced financial sanctions and/or business suspension as a result of non-compliance...

How long ago did this occur?

In the last 3 months
Between 3-6 months ago
More than 6 months ago but less than a year ago
Between 1-5 years ago
More than 5 years ago
I don't remember

**C3B**

The regulatory response was a result of non-compliance with the regulations of which organization?

The Canadian Food Inspection Agency *
Provincial regulators *
Client or customer-specific regulators *
Internal corporate regulators *
International regulators *

*Levels marked with \* are randomized*



**C3C**

What was the impact of the sanction? Select all that apply

Financial only
Human resource related changes (training, change in process or responsibilities, etc.)
Business closure
Corporate Reputation
Other (specify) _____

**C3i** *Show if C3c 1 Financial*

How much was the financial sanction?

Under \$5,000
Between \$5,000 and \$10,000
Between \$10,000 and \$15,000
More than \$15,000
I don't recall

**C3ii** *Show if C3c 1 Financial*

How significant was the impact of the financial sanction to your business?

Very significant
Somewhat significant
Not very significant
Not at all significant

**C3iii** *Show if C3c 3 BusinessClosure*

For how long was the business closed?

Minimum: 0, Maximum: 999

\_\_\_\_\_ Days

**C3iv** *Show if C3c 3 BusinessClosure*

How significant was the impact of this closure to the company?

Very significant
Somewhat significant
Not very significant
Not at all significant

**C3v** *Show if C3c 4 Corporate reputation*

How significant was the impact to the company's corporate reputation?

Very significant
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Somewhat significant
Not very significant
Not at all significant

**C3D**

What was the primary cause of non-compliance that resulted in financial sanctions and/or suspension? Start by selecting the reason that you consider to be most important. If there are other reasons, continue to select all that apply and rank (up/down) in order of importance.

Lack of warning (unexpected inspection) *
Lack of awareness of regulations *
Lack of understanding of regulations *
Conflicting regulations *
Lack of formal policy or defined procedure *
Lack of managerial oversight *
Employee error *
Employee indifference *
Business changes related to COVID *
Other

*Levels marked with \* are randomized*

**C3Df** Show if C3D Other ranked in top 3

What was the "Other" primary cause of non-compliance?

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**C3E**

Thinking back to the most recent time you have experienced financial sanction and/or suspension as a result of non-compliance, does your company generally perceive its treatment from regulators to be...?

Fair
Somewhat fair
Somewhat unfair
Not fair at all

**C3F**

Did the regulator/inspector involved provide information which will help avoid future non-compliance?

Yes
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No
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## Page

### C4

How do you usually receive information from the CFIA? Select all that apply

Mailed documents *
Telephone communications *
Email *
Portal notices in My CFIA *
In-person visits from CFIA representatives *
CFIA website *
Web or video information session *
Social media *
Through an industry association *
Other (Specify) _____

*Levels marked with \* are randomized*

### C5

How effective are the communications that you receive from the CFIA in helping to **understand the regulations** that apply to your company?

Mailed documents *
Telephone communications *
Email *
Portal Notices in My CFIA *
In-person visits from CFIA representatives *
CFIA Website *
Web or video information session *
Social media *
Through an industry association *

*Levels marked with \* are randomized*

5 Highly effective
4
3
2
1 Not effective at all
Not applicable

**C6**

How effective are the communications that you receive from the CFIA in helping to drive compliance at your company?

Mailed documents *
Telephone communications *
Email *
Portal Notices in My CFIA *
In-person visits from CFIA representatives *
CFIA Website *
Web or video information session *
Social media *
Through an industry association *

*Levels marked with \* are randomized*

5 Highly effective
4
3
2
1 Not effective at all
Not applicable

**C7**

If inspected today, what is the likelihood that your business will be found in compliance with CFIA regulations?

Very likely
Somewhat likely
Not very likely
Not at all likely

**C8**

On a regular day when you are not expecting an inspection, what would you estimate your rate of compliance to be (i.e. the percentage of items that would be in compliance with CFIA regulations)?

Minimum: 0, Maximum: 100

\_\_\_\_\_ %

**C9**

How confident are you that the regulations that apply to your business are well understood by all of the employees that need to understand them?

Very confident
Somewhat confident

Not very confident
Not at all confident

**Section SecD:**

D1, D2, D3

**Page**

**D1**

Below are a number of statements about regulation and/or the CFIA. For each statement, please indicate how much it describes the culture or attitudes of your company. A rating of 5 means it 'Describes my company completely'. A rating of 1 means that it 'Does not describe my company at all'.

The decision-makers in my company feel that there is too much regulation by the CFIA *
The decision-makers in my company feel that CFIA regulations are very complicated *
My company believes that CFIA regulation has been implemented in a way that is fair to all businesses *
My company understands the reason why CFIA regulations are in place *
My company believes that complying with CFIA regulations are in our own best interest *
We believe that CFIA regulations are designed and implemented to keep Canadians safe *
Implementing CFIA regulations is too expensive *
CFIA regulations are based on common sense *
There are too many employees in my organization to ensure the implementation of CFIA regulations perfectly all the time *
There are not enough resources in my organization to ensure the implementation of CFIA regulations perfectly all the time *

*Levels marked with \* are randomized*

5 Describes my company completely
4
3
2
1 Does not describe my company at all

**D2**

Below are a number of statements about your interactions and opinions of CFIA regulation and/or the CFIA. For each statement, please indicate how much it describes

your company. A rating of 5 means it ‘Describes my company completely’. A rating of 1 means that it ‘Does not describe my company at all’.

My company is able to find specific information about CFIA regulations quickly and easily *
The CFIA representatives are helpful in providing us with information on regulations *
The CFIA representatives are helpful in resolving existing issues *
The CFIA representatives are helpful in preventing future non-compliance *
Overall, the CFIA is a helpful regulatory agency *
We have confidence in the CFIA

*Levels marked with \* are randomized*

5 Describes my company completely
4
3
2
1 Does not describe my company at all

### **D3**

Below are a number of statements regarding compliance with CFIA regulations. For each statement, please indicate how much it describes the culture or attitudes of your company. A rating of 5 means it ‘Describes my company completely’. A rating of 1 means that it ‘Does not describe my company at all’.

We are proud of our compliance record *
We advertise the regulatory measures we have in place to our customers *
Our regulatory compliance record is not important to us *
Our regulatory compliance record is not important to our customers *
Our company is very concerned about complying with CFIA regulations *
Our company is not concerned about potential financial implications as a result of not complying with CFIA regulations *
Our company considers the potential financial ramifications of not complying with CFIA regulations as part of the “cost of doing business” *
Complying with CFIA regulation is a concern, but we are confident we do *
Complying with CFIA regulation requires our constant attention *
Our company frequently communicates with the CFIA regarding our industry’s specific needs *
Our company is not concerned about potential business suspension as a result of not complying with CFIA regulations *

*Levels marked with \* are randomized*

5 Describes my company completely
4
3

2
1 Does not describe my company at all

**Section SecE:**

E1, E1f, E2, E2f

**Page**

**E1**

What are the top barriers that prevent a business from complying with CFIA safety regulation?

Start by selecting the barrier that you consider to be most important. If there are other barriers, continue to select all that apply and rank (up/down) in order of importance.

It is very expensive to implement CFIA regulations *
It is very complicated to implement CFIA regulations *
Company does not have a culture where following regulations are prioritized *
There are not enough resources or employees to implement all regulatory protocols *
There is a lack of understanding about the changes to CFIA regulations *
CFIA enforcement activities do not impact our decision-making *
The financial impact that we've experienced in the past is not significant or is considered "part of doing business" *
Not concerned about closure/suspension as a result of non-compliance *
Customers or clients do not demand that all CFIA regulations are met *
Not concerned about losing business/sales/customers as a result of non-compliance *
Not concerned about negative media exposure associated with non-compliance *
Other

*Levels marked with \* are randomized*

**E1f** Show if E1 Other ranked in top 5

What was the "Other" barrier to compliance?

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**E2**

Which factors are most significant in ensuring a business complies with CFIA regulation?

Start by selecting the factor that you consider to be most significant. If there are other factors, continue to select all that apply and rank (up/down) in order of significance.

Complying with CFIA regulations is affordable *
Complying with CFIA regulations is simple *
Our company has a culture where regulatory compliance is prioritized *
There is a good understanding when there are changes to CFIA regulations *
We are concerned about the financial costs associated with non-compliance *
We have had administrative monetary penalties in the past *
We have faced licence or permit suspensions in the past and want to avoid them *
My customers or clients <b>demand</b> that CFIA regulations are met *
We are concerned about losing business/sales/customers as a result of CFIA non-compliance *
We are concerned about the negative media exposure associated with non-compliance *
We strive to set the standard for quality in our industry *
We are concerned about losing our licence as a result of food safety non-compliance *(Show if S2 FoodBusiness)
The strength of our business is strongly tied to food safety standards *(Show if S2 FoodBusiness)
We have a reputation for food safety *(Show if S2 FoodBusiness)
Other

*Levels marked with \* are randomized*

**E2f** Show if E2 Other ranked in top

What was the "Other" significant factor to ensuring compliance?

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**Section firmographics:**

X1, X2, X3, X4, X5, X6, X7, X8, X9, X10, X11, X12, X13

**Page**

**X1**

The following information is collected for classification purposes only. Please answer the following questions about **your company**:

Approximately how many people are employed in your company?

Sole proprietor / just me
---------------------------



2 to 9 employees
10 to 49 employees
50 to 99 employees
100 to 499 employees
500 to 999 employees
1000 to 4999 employees
5000+ employees

**X2**

What is the approximate annual **revenue** of your company?

Less than \$100,000
\$100,000 to \$499,999
\$500,000 to \$999,999
\$1 million to less than \$ 25 million
\$25 million to less than \$100 million
\$100 million or more
I don't know / Prefer not to answer

**X3**

How long has your company been in operations?

Less than a year
Between 1-5 years
More than 5 years but less than 10 years
More than 10 years but less than 25
More than 25 years
Not sure

**X4**

How long has your company operated in functions that involved food safety?

Less than a year
Between 1-5 years
More than 5 years but less than 10 years
More than 10 years but less than 25
More than 25 years
Not sure

**X5**

Where does your company currently do business? Select all that apply

British Columbia
Alberta
Saskatchewan

Manitoba
Ontario
Quebec
New Brunswick
Prince Edward Island
Nova Scotia
Newfoundland and Labrador
Yukon
Nunavut
Northwest Territories
The US
Outside of Canada or the US

**X6**

Where does your company have offices or facilities where CFIA regulations are applicable? Select all that apply

British Columbia
Alberta
Saskatchewan
Manitoba
Ontario
Quebec
New Brunswick
Prince Edward Island
Nova Scotia
Newfoundland and Labrador
Yukon
Nunavut
Northwest Territories
The US
Outside of Canada or the US

**X7**

What is the ownership status of your company?

Publicly traded
Privately held
Government/Crown
Not sure

**X8**

Where is your company based?

Headquarters in Canada
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Headquarters in United States
Headquarters outside Canada and the US
Not sure

**X9**

What are your company's regular hours of operation?

Weekdays 9 am to 5 pm
Monday through Saturday
Weekdays & weekends
Open 24 hours / 7 days a week
Other (Specify) _____
Not sure

**X10**

When is usually your company's busiest time of the week?

Weekdays during the day
Weekdays during the evening
Weekends, during the day
Weekends, during the evening
Not sure

**X11**

Which of the following best describes your company's busiest time of the year?

Summer
Fall
Winter
Spring
Holiday occasion(s)
Consistent year-round
Not sure

**X12**

Would you describe your company as Indigenous managed or owned?

Yes
No
Unsure

**X13**

Please describe the approximate percentages of individuals with a senior management position who identify as:

Minimum: 0, Maximum: 100

Male _____ %
Female _____ %
Other gender _____ %
I Don't know

**Section firmographics1:**

Final

**Page**

**Final**

<https://www.inspection.gc.ca>

Thanks for completing the survey. If you have any questions you can contact the CFIA using any of the methods on this page.

<https://www.inspection.gc.ca/about-cfia/contact-us/eng/1546627816321/1546627838025>

Status Code: -1