



Canadian Food
Inspection Agency

Agence canadienne
d'inspection des aliments

Public opinion research with businesses and consumers for the CFIA annual reputation survey 2022-2023

Final report

Prepared for: The Canadian Food Inspection Agency

Supplier Name: Pollara Strategic Insights

Contract number: CW2265540

Contract value: \$ 194,738.55 (including HST)

Award Date: December 16, 2022

Delivery Date: March 31st, 2023

Registration Number: POR 095-22

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Canada 

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This report presents the results of research conducted by Pollara Strategic Insights on behalf of the Canadian Food Inspection Agency. This study consisted of qualitative (focus groups) and quantitative (survey) research with two groups at the core of Agency's mandate: Canadian consumers and regulated food businesses. This study on reputation, trust, messaging and other brand attributes allows the CFIA to manage and develop the CFIA brand.

Cette publication est aussi disponible en français sous le titre : **Recherche sur l'opinion publique auprès des entreprises et des consommateurs pour l'enquête annuelle de réputation de l'ACIA**

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Catalogue Number: A104-208/2023E-PDF

International Standard Book Number (ISBN): 978-0-660-48123-4

Related publications (registration number: POR 095-22):

Catalogue Number: A104-287/2023F-PDF (final report in French)

ISBN: 978-0-660-48126-5

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Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings within the electorate, or ratings of the performance of a political party or its leaders.

Signed:

A handwritten signature in black ink, appearing to read "Craig Worden". The signature is written in a cursive, slightly slanted style.

July 2023

Craig Worden
President
Pollara Strategic Insights

Executive Summary

Background and objectives

The mission of the Canadian Food Inspection Agency (CFIA) is dedicated to safeguarding food, animals, and plants, which enhances the health and well-being of Canada's people, environment, and economy.

Mitigating risks to food safety is a top CFIA priority, and the health and safety of Canadians is a key force behind the design and development of CFIA programs. The CFIA, in collaboration and partnership with industry, consumers, and federal, provincial, and municipal organizations, continues to work towards protecting Canadians from preventable health risks related to food and zoonotic diseases.

The current and future economic prosperity of the Canadian agriculture and forestry sectors relies on a healthy and sustainable animal and plant resource base. As such, the CFIA is continually improving its program design and delivery in the animal health and plant resource areas in order to minimize and manage risks. In an effort to protect the natural environment from invasive animal and plant diseases and plant pests, the CFIA also performs extensive work related to the protection of environmental biodiversity.

The reputation and credibility of the CFIA are vital to the Agency's ability to deliver on the mandate. As such, these variables are a key part of the CFIA's values and drive Agency actions, internally and externally, so trust is preserved. The best way to communicate with stakeholders is continually evolving and needs to be examined.

To assess these elements of reputation of the CFIA, a comprehensive POR study is required using multiple methodologies. This is an annual study on reputation, trust, messaging and other brand attributes that allow the CFIA to manage and develop the CFIA brand. This POR will also capture variables necessary for the POR Indicators required for the Departmental Results Report and Treasury Board Submission Results Annexes.

Methodology

Consumers

As was the case in previous iterations of this study, the research conducted with both consumers and businesses each comprised both qualitative and quantitative methods. The qualitative work conducted with Canadian consumers consisted of six (6) online focus groups, two in French and four in English of some 100 minutes in length with participants who are primarily responsible for the food shopping in their households. Consumer participants were offered \$150 for their participation in the study as compensation for their time.

The quantitative phase of the consumer research was conducted with (N=3003) consumers via an online panel which took an average of 9 minutes to complete. An online survey was chosen because of its capacity to deliver the survey to a broadly representative sample of Canadians efficiently, and because it is well-adapted to Canadians' communication habits. There are limitations to online panels for generalizing the results to the target population, and caution should be taken when applying inferential statistics.

Regulated Businesses

The qualitative work conducted with regulated Canadian businesses consisted of five (5) online focus groups, one in French and four in English of some 110 minutes in length. Qualitative research with businesspeople was focused on companies that are involved in the growing, breeding or transportation of living plants or animals.

The quantitative phase of the regulated business research was conducted with Logit Group and gathered data from (N=1575) businesses via emailed invitations sent out from Agency servers. These took approximately 13.5 minutes on average to complete.

Limitations of Qualitative Research:

Qualitative research is best used for broadening our understanding of what matters to the target audiences and how they think. Qualitative research reveals the diversity of perspectives among target audiences and highlights issues that may not have previously been identified or recognized by the research team. That said, the findings from qualitative inquiry are not and should not be construed as statistically-representative of the populations being studied.

Consumer Quantitative Summary

The purpose of this study is to measure and compare Canadian consumers' perceptions of food, plant and animal health and safety in Canada as well as to evaluate reputation and activities of the CFIA, including how the CFIA is doing as a federal Agency to build consumer familiarity, trust, and confidence in this realm. Another practical objective is to explore how the public are receiving communication messaging, measure their awareness of the CFIA's activities in their daily lives, and perhaps gain some insights into ways to improve messaging in their mission to regulate the safety and health of food, plants and animals in Canada.

Year over year, Canadians awareness of the CFIA as the organization responsible for food, plant and animal health and safety has remained constant. As well, two in three consumers claim to have heard or seen something related to the CFIA in the past year. Sources of awareness are traditional media, the internet and word of mouth. Digital tools such as the CFIA website, podcasts and online articles/ videos are having more impact on awareness and familiarity with the CFIA than newsletters, notices or direct contact with the Agency.

Another objective of this study is to measure the percentage of Canadians who agree that CFIA's activities help ensure food sold in Canada is safe. Canadians have a high level of trust (5, 6, or 7 on a 7-point scale) in the CFIA to do what is right to ensure food is safe in Canada (71%). This is steadily increasing year over year with last year's trust score (70%), and the initial score in 2021 being 66% for this metric. Of note, trust is higher among those in the highest household income bracket, as well as those with higher education.

While consumers still associate the CFIA brand with similar attributes as last year, we are seeing a gradual decline in this agreement. The strongest associations again were "Food recalls are an example of the food system working" 70% (down 3 pts from last year, and 6pts from 2021), "The CFIA looks out for the best interests of Canadians" 64% (down 3pts from last year, and 8pts from 2021) and "The CFIA is effective in enforcing food safety regulations" 61% (down 2 pts from last year and 4 pts from 2021).

Finally, a key driver analysis was conducted to determine the relative importance of a list of variables for predicting familiarity, trust, or confidence in the Agency. It found that the Agency should focus messaging on issues specifically to affect familiarity, trust or confidence as follows:

- The top way to increase *familiarity* include more communication about what Agency does, and provide additional ways to access information about the Agency's activities
- The top drivers of Agency *trust* also remain consistent with last year's results; driving perceptions that the CFIA is "looking out" for the best interests of Canadians, and that the CFIA is effective in enforcing food safety regulations
- *Confidence* in the CFIA is driven by consumers' understanding of the Agency's mandate, and their understanding that food recalls are an example of the food system working.

Business Quantitative Summary

The purpose of this study is to conduct research to measure the CFIA's reputation among key stakeholders, namely industries in the food, plant and animal lines. The organizations interviewed fall within the purview of the Agency and therefore may be more invested with the Agency as it pertains to their business. We looked at organizational familiarity, trust and confidence in the CFIA, as well as communication and brand imagery measures.

A new performance measure (NPS Net Promoter Score) was added to the survey this year in order to have a one-score overall evaluation of the CFIA by businesses. All lines of business gave quite different NPS scores, with Food businesses giving the most favorable score of 48%, followed by Plant businesses (33%) and then Animal (23%). The main difference is among the negative scores (Detractors rating 0-6 on the scale)

We asked Canadian businesses how confident they are that food, as well as animals and plants are safeguarded. An encouraging majority gave a top 3 box score (5, 6, or 7 on a 7-point scale) of 89%. Food businesses rated confidence 91%, while animal and plant were

slightly lower at 85% and 86% respectively. Another reassuring result shows strong confidence in the CFIA when rating their company's level of confidence that food sold in Canada is safe; the top 3 box score (5, 6, or 7 on a 7-point scale) shows very high confidence across segments in the safety of food in Canada (total 92%, food 93%, animal 89%, plant 89%).

When rating the CFIA on a number of attributes and value statements, Food businesses rated the CFIA higher than did Plant and Animal businesses. Similar to last year the same 4 statements involving respect, helpfulness, and fairness earned the highest scores. Encouragingly, businesses with Indigenous owners or those with more than 50% of employees who are visible minorities tended to agree significantly more with these statements about the CFIA. Communication messaging is seemingly doing well at reaching these minority groups.

A key driver analysis was also conducted to predict the most important drivers of Agency familiarity, trust, and confidence among businesses.

- Similar to the last 2 years, the top attributes that drive *familiarity* are clear guidance on regulations, representatives carrying their duties in a respectful manner, and engaging in open and honest dialogue about policies.
- In terms of driving Agency *trust* among businesses, the primary driver is perceived “fairness”, and “sensitivity” to the specific needs of businesses.
- The top two drivers of businesses’ *confidence* in the CFIA are the same as last year although flipped in importance. The Agency needs to communicate that they are “Competent” and “Fair” in order to instill confidence among businesses.

Qualitative Summary

The principal findings from our discussions with both consumer and business participants centre on the diversity of their views about food safety and the CFIA and their implications for the Agency and its communications strategy.

Consumers

We found consumer participants to vary in their interest in food generally, varyingly concerned with the ecological and environmental impact of food production, more or less required to adjust to the rising costs of food, and of differing inclination to trust the organizations— namely governments and food companies – involved in the making and supervision of food. We found as well that Canadians with dietary and health related restrictions on what they can eat have particular and unique concerns about ingredients, transparency, and the safe food practices in industry that make of them a distinct audience. In the very simplest of senses, these influences contribute to broadly divergent conceptions of food safety, opposing those who see it largely as a matter of avoiding exposure to pathogens and their immediate threat of food poisoning and those who’s conception includes longer term threats implications for the health of humans, society and the planet.

A particularly challenging implication in this swirl of influences is that participants hold them in different combinations and to varying degrees – resulting in a mix that much complicates public-facing communication for the CFIA. In sum, our qualitative findings suggest very clearly that the CFIA’s reputation is likely to improve if these differences are accounted for. This report describes these differences in some detail and offers some insight into some of the more evident ways Canadians might be clustered accordingly.

Business Operators

The business operators we spoke to also emerged as a heterogeneous group. In their case, we found that their views about regulations and the CFIA vary as a function of their size, their maturity, their particular area of activity, the degree to which they are subject to regulatory oversight, and finally their organizational values. We encountered clear evidence that bigger organizations are better equipped to deal with regulatory oversight, often evolving their core structures accordingly. Bigger companies – and especially highly regulated ones -- are more likely to have people tasked specifically to regulatory compliance. These human and financial resources investments contribute to the accumulation of specialized knowledge about regulations, and in some cases the development of personal contact with the Agency staff which in turn greatly enhance their ability to navigate the regulation process. Not surprisingly, these bigger companies are more likely to be autonomous in their efforts to keep abreast of regulations and related changes, and more assertive in defending their interests.

Smaller companies and those who experience less frequent contact with the CFIA look very different. Many if not most are preoccupied with securing their business and generally do so with fewer human and financial resources. Operators of smaller companies appear more likely to see regulations and compliance as one priority among many others they must deal with and to deal with regulations reactively as opposed to proactively. The issues of smaller and less regulated companies are more likely to center on recognizing when and in which contexts they are subject to regulations, and the challenges of keeping up with regulatory changes. Although these smaller companies appear to be less likely to encounter compliance issues (in no small part because they are much less under scrutiny), there is some evidence to suggest that when they are, they may be at risk of infractions that bigger companies might well avoid.

Finally, we found varying inclinations among both small and larger, highly and less highly regulated companies to see compliance as a virtuous value. Some of the operators we spoke to clearly see compliance as either good for business, or simply as a social good, and sometimes both. Other operators tend to see compliance as a burden - to be resisted in some cases, more of an annoyance in some cases, and in others, as an obstacle to doing business in a particular field. Not surprisingly, where a company sits on these dimensions appears to have a clear and powerful influence on compliance, on the quality of communications with the Agency, and for the Agency’s reputation. This report also discusses the diversity of businesses in more detail.

Ultimately, these findings on differentiation across both consumer and business audiences suggest that the CFIA has both the potential to improve to its reputation, business relations, and performance by learning more about how these two audiences are segmented and configuring its work accordingly.