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

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Signed:

July 2023

Craig Worden
President
Pollara Strategic Insights

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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.

Full Research Findings

Consumer Qualitative Detailed Results

Canadians' Evolving and Differentiated Understanding of Food Safety

Any observer of the Canadian food landscape would be quick to grasp that consumers are not all of the same mind about the food they prefer. Our grocery stores and local markets provide Canadians with foods that vary impressively in price, ethnic origin, caloric value and so on in an effort to meet our different and evolving preferences. It should be of little surprise then that Canadians are also of diverse minds about what constitutes "safe" food. This section of the report is intended to describe the different ways consumer participants conceive of food safety and how these differences may come to bear on the Agency's work, reputation and communication strategies. Although our findings are exploratory and lacking quantified data about the weight and influence of these differences across the Canadian consumer landscape, they nonetheless point to a limited number of dimensions as central to this understanding. These include ecological values, differences in disposable income, different dietary and health-related imperatives, different levels of trust in the various organizations involved, and finally, different instincts about short versus long term health risks in food, both for humans and the planet. As we hope to make clear, different combinations of these views influence and, to a degree, likely predict how different Canadian consumer segments understand safe food.

Ecological Values

Our participants consider, to varying degrees, the ecological implications of the food they choose to buy and eat. They range between those who consider ecology very little or not at all to those for whom ecological concerns influence most of what they buy. Generally, participants who are the most motivated in this sense are more likely to buy organic products, to avoid GMOs, pesticides, hormones, antibiotics, and other unpronounceable ingredients. These participants also lean toward locally produced and seasonally available foods and avoid foods that must travel long distances before they reach the supermarket shelves out of concern for related pollution. These ecological considerations can, in some of the participants, be strong enough to curb patronage of bigger supermarkets and the products of major food manufacturers.

Participants at the opposite end of this spectrum may be ecologically minded in other ways but are less inclined to consider their food choices in this light. They tend to buy food based on convenience, price, availability, quality and other such matters, and tend to see greater value well-known brands, bigger stores and out of season foods. Although they may express concerns about some ecological matters when prompted, they do not generally factor such considerations into their purchases. Although this research process does not provide us with any solid insight about how spread-out Canadians are on this spectrum, there is nonetheless much to suggest that the proportion of Canadians motivated by ecological considerations is substantial and likely growing.

Disposable Income

Our focus group participants were of very different inclinations and capacities to spend on food and buy accordingly. Our discussions show quite clearly that *disposable* as opposed to total income is key to understanding these choices, as this helps us understand how a family with relatively high levels of household income and several children may face more constraints on how much they can spend on food than a smaller family that earns less but has fewer children. We also encountered participants who save on food for reasons of principle that may have little to do with income: They may take advantage of coupons, shift between retail outlets based on what's "on special" and even plan their meals accordingly because of ingrained habit, personal values or simply a desire to avoid paying more than is necessary.

Our discussions this year clearly show that the food inflation is a growing concern for many, increasingly an influence on what kinds of food are being bought, and increasingly a consideration that raises questions or concerns about the food industry. Interestingly, some contend that some foods, notably organic produce, fresh vegetables, and the like are increasing in price faster than more conventional fare in supermarkets. Although participants were of mixed and often unclear opinions about where the accountability for higher food prices lie, many are inclined to see "eating healthy" as increasingly and disproportionately expensive relative to more conventional (and by extension *less healthy*) options. In these ways, disposable income and the costs of food have the potential to influence what kinds of food are seen to be accessible and healthiest, and for some consumers, provoke concerns about related health implications for the many Canadians who are feeling the pinch of higher prices.

Dietary and Health Imperatives

Our recruiting specifications were designed to ensure the participation of Canadian consumers with dietary and health-related imperatives. We learned from these participants about food safety concerns that differ from those of most other Canadian consumers. Various intolerances (lactose, gluten), food allergies (peanuts, shellfish, etc.) and conditions such as diabetes and celiac disease can be debilitating. Not surprisingly, these participants have elevated concern for what is in their food, and accordingly tend to have higher interest in the food safety regime and elevate concerns about industry's practices. They tend also to see labelling and transparency as highly important, especially about ingredients, manufacturing process and marketing claims. We have also noted that the prospect of innovative or novel forms of food is more concerning to people with these issues.

Food-Related Curiosity

Another dimension that seems to truly divide participants is their relative curiosity about food. We encountered participants at either end of this spectrum: some are *highly curious* about food, and this of course is reflected in their purchasing habits, meal composition instincts and their propensity to try new things. People with such high levels of curiosity are much more likely to experiment with exotic or novel foods, new recipes and cooking techniques from other parts of the world. This in turn tends to elevate their curiosity about measures in Canada to ensure that imported foods are safe. Participants of this inclination also have a noticeably greater appetite to read labels, to learn about the provenance of ingredients and the people or organizations that produce them. Their curiosity extends to published literature about food, to food-related science, and motivates some to build personal relationships with their food suppliers.

Participants at the other end of this spectrum, namely those who are not very or not at all curious about food, tend to eat the same things, tend to avoid exotic foods, and experiment less with novel cooking techniques. They also appear less likely to develop the same breadth of knowledge about food and seem much more likely to view food in strictly utilitarian terms. We have also noted that people with relatively low levels of food-related curiosity also tend to be more trusting of food safety and see it as a relatively simple matter of good food handling practices.

Nuances in the Notion of Food Safety

From our discussions we find that participants differ on whether they see unsafe food primarily as a direct threat only to humans or as something that also poses more indirect threats to and from our environment. Our participants also differ in the degree to which they consider the threat of unsafe food as a short versus longer-term concern. Most, it would appear, are inclined toward the least complicated of these conceptions -- namely to see the threats in food as principally a matter of contaminants, spoilage and getting some form of food poisoning. While people of this inclination most often recognize the potential seriousness of food poisoning, the threats from this perspective are relatively contained to the short-term, and to a large extent knowable. E-coli, listeria, salmonella, and the like are perhaps not always easy to detect, but they are not seen as mysterious in any fundamental way.

Conversely, we also encountered a sizeable number of participants who – in addition to recognizing these shorter-term, exclusively human implications *also* have concerns about longer-term threats inherent in food and its production for the health of our ecosystem and the general welfare of Canadians as a whole. Their worries in this sense include salmonella, E-coli and other contaminants and the immediate threat of food poisoning, but also extend to much more mysterious and unknowable threats from things like glyphosate, GMO's, other pesticides, artificial hormones, some of the practices of large food producers and so on that they fear can contribute to environmental degradation (which in turn can pose a threat of its own to human health), and elevated long-term health risks for Canadians of lower incomes. Canadians who share these concerns are more likely to believe degradations in the environment contribute to cancer, immune diseases and the like, and are more likely to question the equity of the food supply chain. For people of this inclination, the causal mechanisms involved in safe or unsafe food are more numerous, more subtle, take longer to manifest and are accordingly much more difficult to pin down. Not surprisingly, the participants who think this way have more tenuous faith in the safety of the food supply if only because the mechanisms in play are more ambiguous.

Trust in Organizations and Institutions

Finally, our conversations have revealed trust in organizations and institutions is a strong influence on consumer faith in the safety of food. Although we continue to encounter many (perhaps a majority) who have enduring trust in the organizations responsible for the safety of their food, we appear to be encountering increasing numbers inclined to distrust. These people cite concerns about decreasing transparency about food ingredients, provenance and manufacturing practices, concerns about excessive pursuit of profit, and “cut corners” with respect to organizational responsibilities and accountabilities. Some of this distrust stems from what is perceived as deceptive marketing practices in the industry which can range from more minor examples such as labeling fat-free goods “trans-fat free”, or hyping nominally reduced sugar content in foods that are overly sweetened to begin with, to more troubling examples like food fraud. These erode trust in food producers, sow concern about ways food-related science can be manipulated and cast doubt on the strength and adaptiveness of the food safety regulatory regime.

On the whole - and has been the case for the last three years of this study - we find that participants who have high levels of trust in organizations, in science and in institutions are also more inclined to have faith in the safety of their food. Those who are more distrusting have a more complicated and fraught sense of food safety which ebbs and flows depending on their disposition toward different players in the food system. Some question the integrity of individual suppliers. Others have suspicions about complicity and “coziness” between regulators and industry, whereas others still worry that a building regulatory burden is hurting Canadian businesses – with some particularly concerned about the effects on the smaller and more locally-focused businesses that they see as essential to a more environmentally sound food supply chain. Others still are leery of government bureaucracy’s capacity for self-sustaining practices and suspect that much of the fuss about food safety is overcooked and perhaps designed to keep people employed. Although our methodology does not allow us any grounded perspective on how prevalent these views are, it is clear that trust in organizations has ebbed and is an increasingly important influence on the food safety discussion.

Practical Implications in this Variance

The difficulty in these varied ways of thinking, of course, is that they reside in different people to different degrees and in different combinations. The concerns, beliefs and values we have described so far vary considerably in strength from person to person depending on their personal relevance. One consumer's preoccupation with the cost of food, for example, may be dominant because of their underlying economic circumstances, whereas another might see cost equally as important, but as one consideration among many others. We see also from this entangled body of considerations that the very notion of "unsafe food" is an elastic one – conceived and considered in significantly different ways. For example, some may see safe food largely as a matter of controlling pathogenic contaminants like listeria or E-coli, while others might see it largely as a matter of avoiding spoilage. Others might consider both of these *in addition* to other considerations that the previous two might never consider, including pesticide use, GMO's, allergens and so on and in light of their potential to affect long term health in humans either directly, their impact on the environment or their implications for Canadian society as a whole.

Another measure of complexity in this variance is in the degrees to which Canadians share common ways of thinking in recognizable patterns. For example, we have found that people with higher levels of trust in organizations are also more likely to presume Canada's food is safe. We might also surmise from our conversations that people who have very low levels of curiosity about food are more inclined to see food safety as largely a short-term affair, whereas people with high levels of dietary or health related restrictions around food might be more inclined to the opposite. Another correlation hinted at from our conversations suggests that people whose food choices are much influenced by ecological concerns and/or dietary restraints *and* who have lower levels of disposable income are likely much concerned about the costs of food and are accordingly more vigilant and critical about aspects of Canada's food supply chain that contribute to elevated costs.

Although our discussions have been useful for uncovering and unravelling these complex strands of consumer thinking, they are of limited practical help to the Agency for communication or reputation management purposes. What is required -- and what remains beyond the scope of this exercise -- is segmentation analysis that would take these different strands and weave them into a limited number of distinct consumer target audience segments. Properly executed, such work would define target audience segments that are internally homogenous yet collectively different from one another. These could then be prioritized and communicated with on the specific concerns and imperatives that animate their views on food safety and by extension, their views of the Agency. As we have noted, such segmentation is beyond our means at this stage, but it is possible to develop a hypothetical model if only to illustrate some of the ways these segments might emerge.

Hypothetical Consumer Segments – Making Sense of the Variance

The following illustrates four different ways Canadians *might* segment as a function of the influences described above. The reader is cautioned that these are hypothetical constructs intended for illustrative purposes only.

Hypothetical Segment A: Health and Dietary Disciplinarians

One hypothetical segment/target audience – provisionally labelled “Health and Dietary Disciplinarians” would conform to the following of defining values and motives:

- *High dietary and health related restrictions* as a result of food and weight related concerns in the family.
- *High levels of budgetary restrictions.*
- *Moderately low levels of trust in institutions, especially for food producers, distributors, and retailers.*
- *A moderate inclination to equate food safety with short-term threats.*
- *A moderate inclination to equate food safety with the healthiness of food generally.*
- *Moderately high curiosity about food.*

We might expect that consumers who are so motivated would be more likely to shop in “big box” or discount food retailers, but mostly out of need due to their limited disposable income for food. Their meals would likely be planned, and they would likely maintain a high degree of vigilance about food preparation and ingredients. Awareness of the CFIA would likely be low yet be seen as a somewhat comforting overseer of food producers, distributors, and retailers. Effective messaging from the CFIA for this group would emphasize oversight of allergens, new food types, transparency of labelling, traceability and ensuring safe food handling practices in the industry.

Hypothetical Segment B: Cost-Conscious Food Balancers

One hypothetical segment/target audience – provisionally labelled “Cost-Conscious Food Balancers” would conform to the following of defining values and motives:

- *Low dietary and health related restrictions*.
- *Moderately High levels of budgetary restrictions.*

- *Moderately low levels of trust in institutions, especially for governments.*
- *A strong inclination to equate food safety with short-term threats.*
- *A weak inclination to equate food safety with the healthiness of food generally.*
- *Moderately low curiosity about food.*

We might expect that consumers so motivated would be likely to shop in mid-to high end food retailers, largely for the variety of foods and brands available there and their capacity to make weekly food shopping an efficient, one-stop affair. Meals and shopping both would likely be planned given the limited amount of time they have, and the foods from freezer would figure prominently in their meals. This group might be vigilant about food preparation practices, but not so much about ingredients or where their food comes from. Awareness of the CFIA would likely be low. Effective messaging from the CFIA for this group might be that which "humanizes" the agency and imparts some understanding about the science, care, and diligence in Agency employees' work.

Hypothetical Segment C: The Disengaged

One very likely segment/target audience – provisionally labelled "The Disengaged" -- would gather the many Canadians for whom food is a minor concern and conform to the following of defining values and motives:

- *Low dietary and health related restrictions*.
- *Moderately low levels of budgetary restrictions.*
- *A moderate inclination to equate food safety with short-term threats.*
- *A weak inclination to equate food safety with the healthiness of food generally.*
- *Very low curiosity about food.*

We might expect that consumers motivated like this to see food, food shopping and food preparation in very practical terms. Their shopping and meal preparation would be all about efficiency and convenience. Pre-prepared foods and food from the freezer would figure prominently in their meals. This group might be rather casual about food preparation practices, but very indifferent about ingredients or where their food comes from. Awareness of the CFIA would likely be low. Efforts by the Agency to reach this segment would be difficult and unlikely to change much in their beliefs or practices.

Hypothetical Segment D: Health and Ecological-Minded Foodies

One hypothetical segment/target audience – provisionally labelled "Health and Ecological-Minded Foodies" would conform to the following of defining values and motives:

- *Low dietary and health related restrictions*.
- *Low levels of budgetary restrictions.*
- *Low levels of trust in institutions, for food producers, distributors, retailers, and regulators.*
- *A strong inclination to equate food safety with both short and long-term threats.*
- *A very strong inclination to equate food safety with the healthiness of good generally.*
- *A very strong inclination to equate food safety with the health of the ecosystem.*
- *High curiosity about food.*

We might easily imagine such consumers as "foodies" given the interest and care that they have for food generally. Meals and shopping for this group would be very spontaneous, shopped for almost daily and inspired by the provenance and quality of the ingredients they find in food markets, local producers, and specialty shops. Awareness of the CFIA would likely be higher than most Canadians, yet the Agency might well be distrusted as a force that abets the consolidation and concentration of food production. Effective messaging from the CFIA for this group would counter such concerns by providing concrete examples of the Agency's work to support small, local producers, the health of the environment, and a focus on long-term threats in food to the health of humans and the planet.

Potential Communications Implications of this Hypothetical Segmentation

Even this fictional profile of different Canadian consumer groups has implications that warrant consideration:

- First, these profiles should make clear the limited utility that can be expected from generic "one-size-fits-all" messaging from the Agency. Our findings make very clear that Canadians are of varied mindsets, different, and sometimes opposing views about food safety and how it should be achieved. In this context, messages designed to reach all

Canadians risk being perceived superficially meaningful or alienating to some consumer segments animated by more pointed concerns.

- Second, even these fictitious profiles show how some messaging is likely to be inherently controversial. For an example, an Agency that conveys a more assertive stance about long-term threats to the environment or human health might mollify some, and at the same time trigger concerns about bureaucratic overreach among others. In the same vein, an Agency that signals support for “industry” might exacerbate concerns about the marginalization of smaller, local and non-industrial producers among others, or worries about “coziness” between regulators and the regulated for still others. These views also suggest that targeted messaging is something of a necessity.

- Finally, we have encountered very clear evidence that the CFIA has inherent potential influence on Canadians’ views about food safety and its many underpinning in our food system -- when its identity and role is recognized, and when it succeeds in capturing their attention with messages that address their specific concerns and motives. In this, we see very strong evidence that communication with Canadian consumers and the business community is critically important.

Consumer Quantitative Detailed Results

Consumer Perceptions of the CFIA and Food Safety

Awareness of the CFIA

Consumer awareness of the CFIA as the organization in Canada dedicated to food safety remains stable with the previous 2 years (11%), and slightly more Ontarians named CFIA (13%) as did those in Atlantic Canada (14%). When asked the same question with regards to animal health and plant health, unaided awareness of CFIA is substantially lower; only 3% cited CFIA as the organization tasked with animal health vs 2% last year, and 4% as the organization tasked with plant health (same as the last 2 years). Canadians have moderate aided awareness of the CFIA overall (63%), this is trending down slightly from last year (68%). Awareness is lower amongst Millennials; under age 35 (49%) and Quebecers (50%).

Canadians' awareness of CFIA's responsibilities increased slightly over last year, as more than half of Canadians (53%) are aware that moving untreated firewood from a campground or cottage can spread invasive species. Also up from last year, 1 in 5 (19%) Canadians are aware that the CFIA is responsible for regulating the importation of dogs. 1 in 3 (36%) are aware that the CFIA plays an important role in preventing the spread of pests such as Japanese beetle in Vancouver and Emerald Ash Borer in Eastern Canada.

Familiarity and sources of awareness

Approximately 1 in 5 (21%) consumers consider themselves to be very familiar (5, 6 or 7 on a 7-point scale) with the activities of CFIA, which is slightly higher than what was observed last year. Those under age 35 tend to have somewhat higher levels of familiarity (27%) as do Indigenous (37%) and Visible Minorities (29%). While familiarity with the activities of the CFIA is relatively low, 1 in 3 (35%) recall seeing/hearing about the CFIA through traditional media, and another 1 in 5 (21%) recall information via the Internet. One third of Canadians (35%) do not recall hearing or seeing anything related to the CFIA in the past year (vs 51% last year).

A2 - How familiar would you say you are with the activities of the Canadian Food Inspection Agency (CFIA)?

	%
1 Not familiar at all	26%
2	16%
3	18%
4	19%
5	12%
6	5%
7 Very familiar	3%
T3B (5,6,7)	21%

Base: consumer total N = 3003

A3. Where have you seen, heard, or read about the CFIA? Select all that apply.

	%
Traditional media (newspapers, TV, radio)	35%
Internet (includes online news sites but not social media)	21%
Word of mouth (friends, family, etc.)	20%
Social media (not including CFIA social media)	12%
Direct contact from the CFIA (includes CFIA social media and visiting the CFIA website)	4%
Podcasts	3%
A digital assistant (for example, Alexa, Siri, Google)	3%
Not applicable: have not seen, heard, or read anything about the CFIA	35%

Base: consumer total N = 3003

Among those who had heard about the CFIA and its activities, understanding of the information was moderate. Digital assistants (74%) are the source of information with the highest comprehension rate (rated 5,6, or 7 on a 7pt scale), though it had lowest recall overall. Other sources of information including traditional media (72%), direct contact from the CFIA (71%) and the internet (excluding social media) (70%), all provide clear information about the CFIA for those who recall seeing messaging. Information coming from social media (69%) and podcasts (68%) was somewhat less clear, and the clarity of information via “word of mouth” (64%) was the lowest of all sources.

A4 - Thinking about what you have seen, read or heard about the Canadian Food Inspection Agency, indicate how well you understood the information

%	1 Not at all	2	3	4	5	6	7 Understand completely	T3B rated (5,6,7)	N
A digital assistant (for example, Alexa, Siri, Google)	2%	1%	8%	14%	33%	19%	22%	74%	85
Traditional media (newspapers, TV, radio)	1%	2%	6%	18%	31%	22%	20%	72%	1059
Direct contact from the CFIA (includes CFIA social media and visiting the CFIA website)	4%	1%	6%	17%	19%	18%	34%	71%	118
Internet (includes online news sites but not social media)	2%	2%	6%	19%	27%	23%	20%	70%	633
Social media (not including CFIA social media)	3%	2%	7%	20%	31%	19%	19%	69%	344
Podcasts	2%	1%	5%	24%	31%	22%	15%	68%	88
Word of mouth (friends, family, etc.)	1%	3%	8%	24%	29%	15%	20%	64%	600

Base: Consumer, those who recall having seen/heard/read about CFIA (base differs by where information was recalled)
Please note that the acronym "T3B" is used throughout this report to identify where respondents have selected a score of 5, 6, or 7 on a 7-point scale.

We learned that two in three (65%) Canadians report having seen, heard or read about the activities of the CFIA. Nearly half of them (47%) cite reading articles, watching videos, or listening to podcasts from CFIA’s Inspect and Protect, and 34% say they have visited the CFIA website. Less than 1 in 10 follow the CFIA on social media (8%) subscribe to food recall notices (7%) or have a friend/family member who works at the CFIA (7%). Direct contact in person (5%), via email (4%) or phone (3%) are minimal. Only 2% say they subscribe to the Inspect and Protect newsletter. This implies the wider reaching digital tools such as the website, podcasts and online articles/ videos are having more impact on awareness and familiarity with the CFIA.

A3a. Select all the following that apply to you:

	%
I have read articles, watched videos, or listened to podcasts from CFIA's Inspect and Protect	47%
I have visited the CFIA website	34%
I follow the CFIA on a social media platform	8%
I subscribe to CFIA food recall notices	7%
I have a friend or family member who works at the CFIA	7%
I submitted a food safety or labelling concern	6%
In person interaction with a CFIA employee	5%
I have contacted the CFIA by email or through the website	4%
I have contacted the CFIA by phone	3%
I subscribe to the CFIA's Inspect and Protect newsletter	2%

Base: Consumers who recall seeing/ hearing reading about CFIA n = 1942

The favourability score (rated 5,6, or 7 on a 7pt scale) for the Canadian Food Inspection Agency is 58% among consumers, second only to Health Canada at 64%. The organizations with the lowest favourability are the Canada Revenue Agency (47%), and the Canadian Transportation Agency (43%).

AX When you review the following list of government and non-government organizations, how favourable of an impression do you have overall of each organization

	T3B (5,6,7)%
Health Canada	64%
Canadian Food Inspection Agency	58%
Public Health Agency of Canada	57%
Canada Border Services Agency	51%
Canada Department of Fisheries and Oceans	49%
Canada Revenue Agency	47%
Canadian Transportation Agency	43%

Satisfaction with CFIA

Among those who recall seeing/ reading or hearing information about the CFIA and their activities, the highest satisfaction (8, 9, 10 on a 10-point scale) was for "CFIA issues food recall notices in a timely manner" (63%), representing an increase over last year (+12%). Satisfaction with "the CFIA's handling of the food safety or labelling concern you reported"

(59%) is also increased over last year (+9%). The "usability of the CFIA website" had a satisfaction rate of 45% while "the CFIA content on Social Media" had the lowest satisfaction rate at 43%.

A3A1 How satisfied are you...

%	0 Not at all	1	2	3	4	5	6	7	8	9	10 Very	T3B Rated (8,9, 10)	N
that the CFIA issues food recall notices in a timely manner	0%	0%	1%	2%	3%	11%	4%	16%	21%	12%	30%	63%	141
with the CFIA handling of the food safety or labelling concern you reported	1%	1%	3%	3%	2%	11%	7%	13%	25%	19%	16%	59%	105
with the usability of the CFIA website	0%	1%	0%	1%	2%	17%	13%	20%	24%	9%	13%	45%	651
with the CFIA content on social media	2%	1%	2%	3%	2%	15%	9%	24%	20%	8%	15%	43%	155

Base: Consumers who recall seeing/ hearing reading about CFIA n = 1942, base differs by statement selected

Confidence in the safety of Canada's food supply

Consistent with the past two years, just over three quarters (77%) of Canadians have considerable confidence in the safety of Canada's food supply (5, 6 or 7 on a 7-point scale). Like past results, age and income appear to be an influence on views; those 55+ have a higher rate of confidence in the safety of Canada's food supply (79%), as do those in the highest household income bracket, greater than $100,000 (81%), and similarly those with higher education (81%).

A7 - Please rate your level of confidence that food sold in Canada is safe.

	%
1 Not at all confident	2%
2	2%
3	5%
4	15%
5	25%
6	34%
7 Very confident	18%
T3B (5 , 6 , 7)	77%

Base: Consumer total sample N=3003

Specific indicators of trust

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 consistent with last year's trust score (70%). This year, trust is higher among those in the highest household income bracket, greater than $100,000 (75%), as well as those with higher education; university degree or higher (76%). When asked about their trust that food product labels identify ingredients that may cause allergy/food sensitivity, again 70% of Canadians had a high level of trust (5, 6, or 7 on a 7-point scale). Among only those who report having food allergies/sensitivities themselves or a family member in their household (39% of Canadians, +8% over last year), the level of trust is consistent at 69%.

A5 - Please indicate how much you trust the Canadian Food Inspection Agency (CFIA) to do what is right to help ensure that food is safe in Canada?

	%
1 Do not trust at all	3%
2	2%
3	5%
4	20%
5	30%
6	26%
7 Trust completely	15%
T3B (5 ,6 ,7)	71%

Base: Consumer total sample N=3003

A6 - How much do you trust the Canadian Food Inspection Agency (CFIA) to inspect that food product labels have indications regarding ingredients that may cause allergy/food sensitivity?

	%
1 Do not trust at all	2%
2	2%
3	6%
4	20%
5	28%
6	27%
7 Trust completely	15%
T3B (5,6,7)	70%

Base: Consumer total sample N=3003

Three quarters of Canadians (75%) rate the CFIA highly (5, 6 or 7 on a 7-point scale) verifying that food sold in Canada is safe. Those in BC give a slightly higher rating (79%) as do Canadians with a university degree or higher (80%). Consistent with last year's results, the perception that the CFIA is doing well (5, 6 or 7 on a 7-point scale) to safeguard plant health (69%) and animal health (71%) are slightly lower than confidence around food.

A7a - When it comes to verifying that food sold in Canada is safe, how well to you believe the Canadian Food Inspection Agency is doing?

	%
1 Not doing well	2%
2	2%
3	5%
4	16%
5	29%
6	30%
7 Doing well	16%
T3B (5,6,7)	75%

Base: Consumer total sample N=3003

A7b - When it comes to safeguarding plant health (regulating invasive insects, plants, and other plant pests), how well do you believe the Canadian Food Inspection Agency is doing?

	%
1 Not doing well	2%
2	2%
3	6%
4	21%
5	30%
6	26%
7 Doing well	13%
T3B (5,6,7)	69%

Base: Consumer total sample N=3003

A7c - When it comes to safeguarding animal health and preventing the spread of animal diseases, how well do you believe the Canadian Food Inspection Agency is doing?

	%
1 Not doing well	2%
2	2%
3	6%
4	20%
5	31%
6	25%
7 Doing well	14%
T3B (5,6,7)	71%

Base: Consumer total sample N=3003

Brand attributes assessment

Scores on CFIA brand attributes are similar but slightly lower than last year. We measured agreement (5, 6, or 7 on a 7-point scale) with statements about the CFIA, and most respondents agree to a considerable extent with important statements like “Food recalls are an example of the food system working” (70% vs 73% last year), and “The CFIA looks out for the best interests of Canadians” (64% vs 67% last year). In terms of being effective and fair, scores were notably lower; “The CFIA is effective in enforcing food safety regulations” (61% vs 63% last year), and “All businesses are treated fairly by the CFIA” (48% vs 52% last year).

Some of the statements had even less agreement, and consistent with last year less than half of respondents “understand what the CFIA does” (46% vs 47% last year), or thinks that “getting more information about food, plant or animal safety from the CFIA is easy” (44% vs 45% last year).

A8r - Below are several statements about the CFIA. For each statement, please indicate how much you agree or disagree

%	1 Disagree completely	2	3	4	5	6	7 Agree completely	T3B (5,6,7)	N/A
Food recalls are an example of the food system working	1%	2%	6%	15%	25%	23%	22%	70%	7%
The CFIA looks out for the best interests of Canadians	1%	2%	6%	17%	24%	22%	19%	64%	9%
The CFIA is effective in enforcing food safety regulations	1%	2%	6%	18%	27%	21%	13%	61%	12%
CFIA veterinarians are among the best in their field	1%	2%	5%	17%	21%	17%	11%	49%	26%
All businesses are treated fairly by the CFIA	2%	3%	6%	18%	20%	16%	11%	48%	24%
I understand what the CFIA does	3%	6%	11%	22%	24%	13%	9%	46%	12%
Getting more information about food,	2%	3%	8%	19%	21%	14%	9%	44%	24%

plant, or animal safety from the CFIA is easy

Base: Consumer total sample N =3003

Key driver analysis - Consumers

A Key driver analysis was completed again this year to determine the relative importance of variables (using the 7 attributes at A8) for predicting familiarity, trust, or confidence in the Agency. This analysis will help the Agency to focus messaging on issues likely to increase consumers general trust in its efforts.

As was the case last year, the top ways to increase familiarity is to communicate more about what Agency does (45%) and provide additional ways to access information about the Agency's (21%) activities.

CFIA – all attribute drivers of A2 familiarity (total sample)

Statement	Share of Importance (%)
I understand what the CFIA does	44.8
Getting more information about food, plant, or animal safety from the CFIA is easy	21.0
CFIA veterinarians are among the best in their field	11.9
All businesses are treated fairly by the CFIA	7.0
The CFIA is effective in enforcing food safety regulations	6.8
The CFIA looks out for the best interests of Canadians	4.7
Food recalls are an example of the food system working	3.7

The top drivers of trust in the Agency, are identical to last year's analysis. The top driver is "The CFIA looks out of the best interests of Canadians" (24%), followed by "The CFIA is effective in enforcing food safety regulations" (19%) and then "Food recalls are an example of the food system working" (17%).

CFIA – all attribute drivers of A5 trust (total sample)

Statement	Share of Importance (%)
The CFIA looks out for the best interests of Canadians	23.5
The CFIA is effective in enforcing food safety regulations	19.4
Food recalls are an example of the food system working	16.9
All businesses are treated fairly by the CFIA	12.5
CFIA veterinarians are among the best in their field	12.0
Getting more information about food, plant, or animal safety from the CFIA is easy	9.5
I understand what the CFIA does	6.3

Key drivers of consumer confidence include feeling assured and seeing evidence that the CFIA is working for them. The top driver is consumers' understanding of the Agency's mandate; "the CFIA looks out for the best interests of Canadians" which has an 23% share of importance, followed by the understanding that food recalls are the enactment of that mandate; "Food recalls are an example of the food system working" 22% share of importance, and also that "the CFIA Is effective in enforcing food safety regulations" with a 21% share of importance.

CFIA – all attribute drivers of A7 confidence (total sample)

Statement	Share of Importance (%)
The CFIA looks out for the best interests of Canadians	23.2
Food recalls are an example of the food system working	21.8
The CFIA is effective in enforcing food safety regulations	20.7
All businesses are treated fairly by the CFIA	11.7
CFIA veterinarians are among the best in their field	10.3
Getting more information about food, plant, or animal safety from the CFIA is easy	7.8
I understand what the CFIA does	4.6

Message evaluation - Consumers

Canadians have very similar agreement (5, 6, or 7 on a 7-point scale) with the same messages shown last year regarding the CFIA's regulations and enforcement activities. Messages that generate the most agreement include "By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy." (74%) and "As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks." (70%), "The CFIA issues food recalls in a timely manner" (68%), and "The CFIA enforces regulations that help ensure Canada's plant resources are protected" (67%). Secondary messaging with lower agreement scores includes "The CFIA enforces regulations that helps ensure animals are transported humanely" (63%), "CFIA enforcement activities are strong enough to encourage companies to comply with the regulations" (63%), and "CFIA helps to facilitate international trade" (59%).

B1 - How much do you agree or disagree with each of the following statements

%	1 Disagree completely	2	3	4	5	6	7 Agree completely	T3B (5,6,7)
By protecting Canada's food, animals, and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy	2%	1%	5%	18%	25%	27%	22%	74%
As a science-based regulator, the CFIA is believable when it issues a statement	2%	2%	5%	21%	26%	26%	18%	70%
The CFIA issues food recall warnings in a timely manner	2%	2%	6%	21%	27%	24%	17%	68%
The CFIA enforces regulations that help ensure Canada's plant resources are protected	2%	2%	7%	22%	28%	24%	15%	67%
The CFIA enforces regulations that help ensure animals are transported humanely	3%	2%	7%	24%	28%	22%	14%	63%
CFIA enforcement activities are strong enough to encourage companies to comply with the regulations	3%	2%	8%	24%	28%	21%	13%	63%
CFIA helps to facilitate international trade	3%	2%	8%	28%	26%	20%	13%	59%

Base: Consumer total sample N = 3003

Canadians were then asked to list the following list of priorities for the CFIA in order of most important to least important. The most important priority by a large margin was “Verifying safe food is sold to consumers” by 51% of the sample, an increase of +6% over the same priority last year. Next in priority was “Helping to keep foreign animal diseases out of Canada” (12%), and the third priority was “Verifying importers do not import contaminated or fraudulent foods”(10%).

B1ar - Please rank what you personally believe the priorities of the CFIA should be in order of most important to least important

%	Rank 1	Rank 2	Rank 3
Verifying safe food is sold to consumers	51%	13%	10%
Helping to keep foreign animal diseases out of Canada	12%	17%	17%
Verifying importers do not import contaminated or fraudulent foods	10%	23%	17%
Helping prevent the spread of plant pests and animal diseases in Canada	8%	14%	18%
Verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada	8%	16%	15%
Helping prevent plant pests and invasive species from entering Canada	7%	11%	15%
Helping to keep international markets open to Canadian food, plant, and animal products	5%	6%	8%

Base: Consumer total N = 3003

A TURF analysis (Total Unduplicated Reach and Frequency) was used to measure which individual and unique messages contribute most to what consumers hear about the Agency. Consistent with the 2021 and 2022 results, the most effective message overall was "By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy" which met with agreement from 745% of respondents. The next most unique and effective message (identified by removing all participants who selected the first message) is "As a science-based regulator, the CFIA is believable when it issues a statement" which adds an incremental 6%. Incremental reach levels off at this point, showing that these 2 messages have the potential to reach 80% of consumers.

B1: Below are some statements to describe the activities of the Canadian Food Inspection Agency (CFIA). How much do you agree or disagree with each of the following statements?

TURF - Incremental reach (T3B%)	
By protecting Canada's food, animals, and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy	74%
As a science-based regulator, the CFIA is believable when it issues a statement	6%
The CFIA issues food recall warnings in a timely manner	2%
The CFIA enforces regulations that help ensure animals are transported humanely	1%

CFIA enforcement activities are strong enough to encourage companies to comply with the regulations	1%
CFIA helps to facilitate international trade	1%
The CFIA enforces regulations that help ensure Canada's plant resources are protected	0%

Base: Consumer total N = 3003

Consumer perceptions of CFIA institutional attributes and values

Respondents were asked to choose from a list of attributes those that best describe the CFIA. At the top of the list are "Scientific" (51%), "Trusted" (45%), "Dedicated" (38%), "Responsive" (38%), "Informative" (37%) and "Efficient" (36%). About one in four selected "Service oriented" (27%), "Consistent" (26%), "Fair" (25%), "Respectful" (23%) and "Caring" (23%). Some of the words not generally associated with the CFIA are "Punitive" (5%), "Innovative" (14%) and "Global Leader" (16%).

B5. Please look at the following list of words, and select the ones that in your view, describe the CFIA. Please select all that apply.

	%
Scientific	51%
Trusted	45%
Dedicated	38%
Responsive	38%
Informative	37%
Efficient	36%
Service oriented	27%
Consistent	26%
Fair	25%
Respectful	23%
Caring	23%
Transparent	20%
Collaborative	19%
Global Leader	16%
Innovative	14%
Punitive	5%
None of the above	8%

Base: Consumer total N = 3003

Consumer perceptions of CFIA's Focus

Most Canadians believe that the CFIA is mainly involved in situations at the border, checking food, plants and animals coming into the country: "Checking food products being imported into the country" (78%), and "Checking plant products coming into the country"

(75%). About half of consumers think the CFIA is involved in regulating “insects, fungus and other pests that affect plant health, but do not have a direct impact on the ability of consumers to eat the plant as food” (60%). Roughly half of consumers perceive the CFIA to be involved in situations involving animals being imported or exported, whether as pets, for food, or for other reasons. About 1 in 3 believe the CFIA is involved in food safety at restaurants, whether it be sanitary conditions or food poisoning.

B6. From the following list, indicate which of the following situations you believe the CFIA is involved in?

	%
Checking food products being imported into the country	78%
Checking plant products coming into the country	75%
Insects, fungus, and other pests that affect plant health, but do not have a direct impact on the ability of consumers to eat the plant as food	60%
Live animals being exported from Canada to other countries to be consumed as food	56%
A dog being brought into Canada to be permanently adopted by a person living in Canada	56%
Live animals being exported from Canada to other countries for reasons other than to be consumed as food	50%
A dog being brought into Canada by a vacationing family	44%
A restaurant has a complaint of a dirty kitchen	34%
A person gets food poisoning from cooking and eating undercooked meat	29%

Base: Consumer total N = 3003

Business Qualitative Detailed Results

The representatives of CFIA regulated businesses we spoke to are also of varying opinions about the Agency as is natural given the deeper and more involved nature of their interactions. Generally, we have found a more limited number of dimensions account for this variance, namely the amount of time the regulated organization has been in business, the nature of the industry (which in turn dictates the extent and nature of the oversight the Agency exercises), the organization’s size, and finally, the organization’s values or culture. The reader will note that in contrast to the consumer piece, the CFIA is in possession of a formal segmentation of regulated businesses along these lines. This year’s qualitative work with regulated businesses validates and somewhat deepens our understanding of this work.

Variance in Organizational Maturity and Size

It is quite clear that the length of time a food-related business has been in operation influences perceptions of the Agency and its reputation. Older and more established businesses are generally staffed with people who have a wealth of experience with regulations, inspectors, and the Agency's messaging. People who have been working with the Agency over long periods of time are uniquely aware of evolutions in the ways the Agency operates and of changes in regulations themselves. Typically, more experienced businesspeople *compare and contrast* more recent evolutions to the practices of the past, and as a result are quicker to notice inconsistencies, degradations in service, shifts in Agency priorities and a host of other reputational attributes that are generally less noticeable to less experienced operators. Critically, more experienced operators have had more time to learn about and adjust to being regulated, and the adjustment appears to de-mystify the Agency as a whole: its people, practices, and ways of interacting are simply better known.

Newer, less experienced operators and especially those who work for recently established businesses are confronted with a steep learning curve, and requirements that are more mystifying. These newer operators often do not fully understand the rationale behind some regulatory requirements and tend to be more reactive to the occasional inconsistencies in how the rules are interpreted and applied. Newer and less experienced operators also show some tendency to see inspections and potential non-compliance issues as intimidating. Although more established businesses can be both big and small, startup food companies are often smaller in size and staffed by personnel who have multiple roles and responsibilities. These conditions inhibit the acquisition of specific regulatory know-how and Agency relationship management skill that might otherwise make interactions more manageable. In contrast, we see quite clearly that the more regulated bigger organizations delegate and thus concentrate regulatory know-how in people who are more singularly focused. These people greatly facilitate the organization's capacity to navigate the regulatory regime, ensure compliance and interact more proficiently and capably with the Agency. Such people are much more likely to develop personal contact with Agency personnel or outside partners that can help them manage ambiguities, learn about changes and avoid compliance related issues.

Variance in Food-Related Industries

Even within the confines of the "plant" and "animal" business lines (which are the focus of this study), different degrees of oversight from business to business has considerable influence on the Agency's reputation. Generally, we found that organizations that experience more oversight tend to have the same patterns as more established ones in that they are more familiar, more comfortable, more confident in their capacity to know and operate within the rules and to interact productively with the Agency. Less regulated organizations tend to more tenuous confidence, confront a steeper learning curve, encounter greater ambiguity in the rules and tend to see regulations and the Agency as more mysterious, if not intimidating. Organizations that are less regulated are much more prone to confusion about conflicts between different regulatory bodies and regimes. In sum, then, we found that an experienced operator of a cattle transportation firm has views and ways of seeing the Agency that differ dramatically from those of a newly minted small-scale organic vegetable greenhouse operator. The former will tend to understand the rules and be more tolerant of subjective interpretation of rules by different inspectors, in part because he or she has encountered such things previously. The newly minted organic grower, in contrast, is likely to be less disciplined and attentive about rules and regulations, to imagine the consequences of non-compliance incorrectly, and to see and consider regulations and compliance as only one among many other priorities, and to find the Agency remote and the rules more intimidating and/or opaque.

Variance in Organizational Values

Finally, we see that business organizations and their operators are different in their inclination to embrace regulations: some approach learning the rules, dealing with the Agency and compliance more eagerly, whereas others tend to the opposite. Quite clearly, those organizations that embrace the regulatory regime are more open to Agency staff, work harder at learning the rules, and tend to see compliance as a facilitator of their fortunes. Conversely, organizations that resist regulations tend to the opposite – to work less hard at learning the rules and to see the Agency as an impediment to their fortunes. The forces behind the embrace of regulatory insight are quite clear and split in two ways. One mindset sees compliance as a matter of self-interest. This view holds compliance – and particularly avoiding the issues related to non-compliance as good for business. Business operators who adhere to this mindset are more likely to view the impact of non-compliance negatively, seeing it as detrimental to their reputation, brand equity or operating profit. Learning the rules and developing good relations with the Agency are more likely to be accepted as a cost of doing business and a measure of cost-savings in the long run. Another view that underpins organizations who embrace regulatory oversight is altruistic. From this perspective, learning about and adhering to the rules is simply the right thing to do, especially because it can prevent or reduce the risks of unsafe food harming consumers or the environment. We have found that these two motives for compliance are not incompatible with each other, as indeed some organizations manifest both altruistic and self-interested values at once.

Resistance to regulatory oversight, on the other hand, seems to stem from more diverse and complicated sources. Some resistance stems from the steepness of the regulatory learning curve, which can be especially daunting to new, inexperienced or firms struggling to establish themselves. Such people may view the effort as simply too time-consuming or insufficiently important relative to the many other challenges they confront. Other kinds of resistance seem to reflect the personal values of owner-operators who may be resistant to authority or what they feel is meddling in their affairs. Others may have had interactions with the Agency that were alienating. Still others may simply fail to recognize that they are, in fact, in a business line that is subject to regulations in the first place.

Issues and Complaints – New and Recurring

The following sections inventories some new or recurring issues and complaints we heard about, and what sorts of businesses mentioned them. These are inventoried in no particular order and are not quantified in terms of prevalence:

Frictions and Complains Attributable to Perceived Shifts in Agency Priorities and Modes

Decreased Access to Live Agency Personnel

As was the case last year, some business operator participants mentioned the increasing difficulty in reaching real, live Agency personnel to help them with problems. Although some new business operators noted this, this complaint was more often voiced by experienced and established operators who noted this as a contrast – and a degradation – relative to years past. This reduced access – though occasionally seen as simply a result of reductions in staff – was also at times equated with an Agency intent on shifting the onus for learning about and decoding complexly worded regulations onto businesses and a retreat from an emphasis on partnership with industry toward a posture of enforcement. This perception, while more likely to be noted by well-established operators, was nonetheless particularly problematic for new ones. It fuels impressions that regulations and their underlying purposes are hard to understand and something they have to figure out on their own. Better established operators have had time to learn and develop the contacts within the Agency to better manage this perceived shift.

Arbitrary and Subjective Rule Interpretation by Inspectors

Although there are signs that this problem noted last year is perhaps stabilizing if not diminishing, we continued to hear about inspectors – new or otherwise new to their charges' business– who issue inconsistent interpretations of the regulations. This problem is occasionally associated with Agency staff who are viewed as authoritarian or closed-minded and resistant to discussion or challenge. Again, these problems seem less pronounced for more established or experienced operators (who are more familiar with and comfortable challenging the inspectors) and more vexing for less experienced or established ones. A related and important complaint -and one sometimes associated with the above, is that the Agency is in some corners as less inclined offer recourse to those operators deemed non-compliant and is seen as decreasingly inclined to offer clarifications to ambiguous regulations in favor of simply emailing the complex regulation text and leaving it to the operator to figure out.

A Burdensome Regulatory Regime

We repeatedly encountered operators who feel that they are simply over-regulated. This view is often accompanied by a sense that the Agency isn't sufficiently aware of their operating realities, increasingly remote or otherwise prone to adding complexity rather than simplifying things. Many operators continue to question the level of detail that is required in certain paperwork and complain about the burden that results. "The CFIA treats every company as if they were a multinational" is how one participant put it. Some businesspeople (often in exporting) feel the Agency is too slow to transition to electronic documents and other digital modes of operating. Other complain about overlap or contradictions between the regulations of different industries, levels of Canadian government or between Canada and other countries. Another complaint is about generic rules, for example those written for relatively easy to handle cows that are imposed on much wilder Bison. Some operators also feel that they must put the onus of compliance on personnel who are neither equipped nor willing to deal with them. This problem was well articulated by a cattle transporter who complained that his drivers all need to be veterinarians these days lest they fail to recognize the occasional cow that's showing subtle signs of struggling.

An Agency that Sometimes Falls Short of Meeting its Own Commitments

As was the case in years past, some operators of regulated businesses were put off by the Agency's occasional incapacity to meet its own commitments. Promised paperwork, interpretations or even commitments to recontact business who may have called or sent an email are occasionally not provided within the stipulated timeframes or even at all. These complaints were more often cited by business operators that work in more specialized or unusual industries and appear to fuel a sense that the Agency is developing a bias in favor of its biggest and most heavily regulated charges.

Access to Abattoirs and Meat Processing Facilities

Finally, we noted a persistent and apparently increasing issue with the consolidation of abattoirs and meat-processing factories, which is apparently an increasing challenge to the viability of small-scale organic meat producers or grass-fed cattle growers. Although we encountered some recognition that this consolidation may be attributed to larger forces beyond the Agency's influence, there remains a clear tendency to see the Agency's regulatory regime as a root cause. Regulations are often cited as an important barrier to these more local, smaller-scale and less structured food producers. As a result, small scale producers appear more likely to give up on their plans, noting that they are unlikely to make a living if they must transport their cattle hundreds of kilometers to a plant that is already struggling to keep up with demand. This problem, which we noted three years ago, is clearly an increasing concern and barrier to smaller farmers who seek to exploit opportunities they see in growing consumer demand for the kinds of meats they can produce.

Positive Signs

Finally, we also noted some more positive views and perspectives on the Agency and its ways of working:

- The Agency "MY CFIA" web portal is increasingly described as a functional, useful and efficiency enhancing tool for businesses inclined to use it. Some also noted that the portal might yet evolve into something even more useful.
- Several participants noted having encountered new inspectors who exhibited openness to learning about the operators' realities, a willingness to discuss the rules and generally good communication skills.

Business Quantitative Detailed Results

Business perceptions of the CFIA

Businesses whose operations are regulated by the CFIA were surveyed about their perceptions and opinions of the CFIA and its activities. Being more familiar with the CFIA, these businesses tend to be more invested in the performance of the Agency given its relevancy to their business.

Please note that throughout the report, the Agency's terminology for differentiated business is used. "Food line" refers to businesses that transform food from raw form to products that are sold to consumers. In this sense, beef and a beef processor are considered part of the "food" line as soon as the animal crosses the farm or ranch gate but remains a feature of the "animal" line up until it crosses that gate. Similarly, soybeans, for example, are "plant" up until they cross the farm gate and are on their way to processing into tofu and so on.

CFIA reputation and performance indicators among businesses

Canadian businesses were asked a new performance evaluation question this year. This is commonly known as a Net Promoter Score (NPS); How likely would you be to recommend the agency to similar businesses as yours? This metric will be useful to compare over time as another measurement of how the Agency has moved the needle as a whole rather than only comparing the single metrics such as Familiarity, Trust and Confidence.

All lines of business have quite different NPS scores, with Food businesses giving the most favourable score of 48%, followed by Plant businesses at 33% and then Animal at 23%. The main difference is among the negative scores (Detractors rating 0-6 on the scale).

A0 - 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. How likely would you be to recommend the agency to similar businesses as yours?

	Total	Food	Animal	Plant
0 Not at all likely	4%	4%	6%	5%
1	1%	1%	3%	2%
2	1%	1%	1%	1%
3	2%	1%	4%	1%
4	2%	1%	4%	1%
5	7%	7%	8%	8%
6	3%	3%	3%	6%
7	8%	8%	11%	7%
8	11%	11%	10%	12%
9	10%	11%	8%	10%
10 Very likely	51%	54%	43%	47%
9-10 Promoters	61%	65%	51%	57%
7-8 Passives	19%	18%	21%	19%
0-6 Detractors	20%	17%	28%	24%
NPS	41	48	23	33

Most businesses surveyed have strong familiarity (5, 6, or 7 on a 7-point scale) with the activities of the CFIA. The overall score is 77% for food, which is down slightly from last year (-4%), 83% for animal, and 75% for plant businesses (-5% from previous year). Overall, 78% of businesses are familiar, this is down slightly from 2022 (81%), but still up from the year before (72%).

A1 - How familiar would you say your company is with the activities of the Canadian Food Inspection Agency (CFIA)?

	1 Not familiar at all	2	3	4	5	6	7 Very familiar	T3B (5,6,7)
Total	2%	3%	5%	12%	23%	25%	30%	78%
Food businesses	2%	3%	5%	12%	22%	25%	30%	77%
Animal health businesses	0%	4%	5%	8%	27%	25%	31%	83%
Plant health businesses	3%	2%	5%	15%	22%	25%	28%	75%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Communication received from the CFIA to businesses was largely via Email (85%). This is consistent with last year's report, and similar across business lines. Another common source of communication is Portal notices in My CFIA (34%) and the CFIA website (34%) though both are higher amongst the animal line (49%, and 43% respectively). One in four recall a personal interaction with a CFIA representative (27%) and one in five had telephone communication (21%).

B4. How has your company received information from the CFIA in the past year? Select all that apply.

%	Total	Food	Animal	Plant
Email (including CFIA Listservs)	85%	86%	82%	86%
Portal notices in My CFIA	34%	30%	49%	36%
CFIA website	34%	32%	43%	31%
Personal interaction with a CFIA representative	27%	23%	38%	33%
Telephone communications	21%	19%	30%	22%
Mailed documents	15%	14%	16%	18%
Through an industry association	10%	8%	14%	11%
Social media	5%	6%	3%	4%
CFIA's Inspect and Protect newsletter	4%	4%	3%	3%
Podcasts	1%	1%	1%	0%
Other	1%	1%	1%	1%
Not applicable	3%	3%	2%	3%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

When asked about the information received from the CFIA, all methods of communication generate strong rates of understanding (5, 6, or 7 on 7-point scale), with most scores for all listed sources being greater than 80% overall and across all lines of business. Consistent with last year's understanding scores, the Portal Notices in My CFIA had lower scores than the other communication methods (total 73%, food 76%, animal 71%, plant 68%), as did the CFIA website (total 72%, food 77%, animal 63%, plant 66%).

B5: T3B Please rate how well your company understands the information when it is received from the Canadian Food Inspection Agency (CFIA)?

%	1 No understanding at all	2	3	4	5	6	7 Understands completely	T3B (5,6,7)	Row n
Podcasts	0%	0%	0%	0%	10%	50%	40%	100%	10*
Personal interaction with CFIA representative	0%	1%	3%	6%	16%	28%	46%	90%	430
CFIA's Inspect and Protect newsletter	0%	2%	2%	9%	22%	28%	38%	88%	58
Telephone communications	1%	1%	2%	7%	15%	28%	44%	88%	335
Social media	1%	1%	3%	8%	17%	28%	42%	87%	78
Through an industry association	0%	1%	3%	12%	26%	30%	28%	85%	152
Mailed documents	1%	2%	4%	8%	18%	28%	39%	85%	240
Email (including CFIA Listservs)	1%	2%	4%	12%	22%	27%	31%	80%	1340
Portal notices in My CFIA	1%	4%	7%	15%	22%	26%	25%	73%	538
CFIA website	1%	3%	7%	18%	22%	26%	24%	72%	536

Base: Business; those who received specific communication methods; base size differs by method

"*"Indicates small base size

Business trust in CFIA to do "what is right"

An encouraging finding shows that a strong majority of Canadian businesses "trust the CFIA to do what is right". Strong trust scores (5, 6, or 7 on a 7-point scale) overall at 84%, (food 88%, animal 73%, plant 79%) which are all up over last year's scores overall and across all lines of business.

A3 - Please indicate how much your company trusts the Canadian Food Inspection Agency (CFIA) to do what is right?

	Total	Food	Animal	Plant
1 Do not trust at all	3%	2%	5%	3%
2	2%	1%	4%	2%
3	3%	2%	7%	2%
4	8%	6%	10%	14%
5	16%	15%	20%	15%
6	30%	31%	27%	31%
7 Trust completely	38%	42%	26%	33%
T3B (5,6,7)	84%	88%	73%	79%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Business confidence in Canadian food safety

Another reassuring result shows strong confidence in the CFIA; just under half of all business respondents (47%) feel very confident (7 on a 7-point scale) 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%). Less than 5% of businesses had low confidence in the food sold in Canada (rating of 1,2 or 3 on a 7-point scale).

A4 - Please rate your company's level of confidence that food sold in Canada is safe. Please provide your opinion even if you are not primarily a food business.

	Total	Food	Animal	Plant
1 Not confident at all	1%	1%	2%	0%
2	1%	0%	1%	1%
3	2%	2%	3%	2%
4	5%	4%	5%	8%
5	13%	11%	17%	17%
6	31%	30%	37%	31%
7 Very confident	47%	52%	35%	41%
T3B (5,6,7)	92%	93%	89%	89%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Business confidence in safeguarding of food, plant, and animals

In the expanded confidence question we asked about how confident businesses are that food, as well as animals and plants are safeguarded, there is a decrease in top box confidence, down to 41% very confident (7 on a 7-point scale). However the top 3 box score (5, 6, or 7 on a 7-point scale) for confidence in safeguarding food, plant and animals is still very high at 89% of total businesses (food 91%, animal 85%, plant 86%). Again, the number of businesses that rated confidence at a 1 or 2 score remains inconsequential (less than 5%), and is consistent with results in the past two years.

A5 - Please rate your company's level of confidence that food, plants and animals in Canada are safeguarded.

	Total	Food	Animal	Plant
1 Not confident at all	1%	1%	2%	0%
2	1%	1%	3%	2%
3	2%	1%	3%	3%
4	6%	5%	7%	9%
5	16%	14%	19%	20%
6	32%	31%	36%	33%
7 Very confident	41%	46%	30%	33%
T3B (5,6,7)	89%	91%	85%	86%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Agency performance in safeguarding safety of food among businesses

Diving deeper into the confidence scores, we asked food industry companies how they believe the CFIA is doing with respect to safeguarding the safety of food sold in Canada. Relative to last year, food businesses had improved perceptions with 45% rating the CFIA a perfect 7 on a 7-point scale. Top 3 box scores (5, 6, or 7 on a 7-point scale) were like last year at 89% among food businesses.

A6 - When it comes to safeguarding the safety of food sold in Canada, how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily a food company.

	Food
1 Not doing well	2%
2	1%
3	2%
4	6%
5	14%
6	30%
7 Doing well	45%
T3B (5,6,7)	89%

Base: Business Food N=1010

Agency performance in safeguarding safety of plant health among businesses

Similarly, plant industry businesses rate the CFIA highly (5, 6 or 7 on a 7-point scale) with a score of 86% in safeguarding the health of plants in Canada, and a top box score (7 on a 7-point scale) of 35%, which is notably lower than the confidence businesses have in food safeguarding by the CFIA.

A7 - When it comes to safeguarding the health of plants in Canada how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily a plant company.

	Plant
1 Not doing well	1%
2	2%
3	3%
4	9%
5	21%
6	30%
7 Doing well	35%
T3B (5,6,7)	86%

Base: Business Plant N=288

Agency performance in safeguarding safety of animal health among businesses

When it comes to animal safeguarding, there is lower confidence overall among Animal industry businesses, at 80% T3B (5, 6 or 7 on a 7-point scale). They also had a lower top box confidence score than the food and plant industries at only 23% (7 on a 7-point scale), which signifies an area of perception improvement for the CFIA.

A8 - When comes to safeguarding the health of animals in Canada how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily an animal company.

	Animal
1 Not doing well	3%
2	2%
3	5%
4	10%
5	21%
6	36%
7 Doing well	23%
T3B (5,6,7)	80%

Base: Business Animal N=277

Business evaluation of CFIA attributes and institutional values

The survey asked businesses to rate the CFIA across a number of attributes and value statements. On most attributes, 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 had the highest T3B box scores (5,6 or 7 on a 7 pt scale). Scores on total were; “Representatives of the CFIA are respectful in carrying out their duties” (80%), “Representatives of CFIA are helpful when providing information on regulations” (72%), “Overall, the CFIA is a fair regulatory Agency” (71%), and “Information received from the CFIA helps to stop future non-compliance” (69%). Businesses with Indigenous owners or that have more than 50% of employees who are visible minorities tended to agree significantly more with these statements about the CFIA.

Several statements about the fairness of the way the CFIA operates and enforces regulations across industries and business type received middling scores; “The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain" (58%), "It is easy to have open and honest dialogue with the CFIA about regulatory priorities" (57%), "CFIA regulations have been implemented in a way that is fair to all businesses" (57%), "The CFIA is sensitive to the reality of how things work in your specific industry" (57%) and "The CFIA does business in the same way for everyone within their mandate" (56%). The scores could be due to not knowing how the CFIA works for businesses outside of the realm these businesses are aware of.

Statements that received lower T3B scores referenced understanding the regulations and services provided; "The decision-makers in my company feel that CFIA regulations are very complicated" (54%), "The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities" (51%), "The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs" (49%), "The CFIA provides better service compared to food inspection agencies in other developed countries" (46%), "CFIA regulations are too basic for my company to be concerned about" (19%).

A9 - Below are several statements about the CFIA. Please indicate your level of agreement on a 7-point scale.

	% in agreement (5, 6 or 7 out of a 7-point scale)
Representatives of the CFIA are respectful in carrying out their duties	80%
Representatives of the CFIA are helpful when providing information on regulations	72%
Overall, the CFIA is a fair regulatory agency	71%
Information received from the CFIA helps to stop future non-compliance	69%
The CFIA is transparent in how they operate	60%
CFIA guidance on regulations is clear	59%
The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain	58%
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	57%
CFIA regulations have been implemented in a way that is fair to all businesses	57%
The CFIA is sensitive to the reality of how things work in your specific industry	57%
The CFIA does business in the same way for everyone within their mandate	56%
The decision-makers in my company feel that CFIA regulations are very complicated	54%
The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities	51%
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	49%
The CFIA provides better service compared to food inspection agencies in other developed countries	46%
CFIA regulations are too basic for my company to be concerned about	19%

Base: Total sample N=1575

Key drivers analysis - Businesses

Again, this year, a key driver analysis was conducted to predict the outcome variable (familiarity, trust, or confidence) using the attributes at A9. The analysis shows that for each of the 3 key metrics, there are uniquely important drivers that the CFIA should focus communication on in an effort to increase familiarity, trust and confidence among businesses.

In assessing the primary driver of familiarity, the top two attributes are "CFIA guidance on regulations is clear" (16% share of importance) and "Representatives of the CFIA are respectful in carrying out their duties" (15% share). The next driver in order of importance is "It is easy to have open and honest dialogue with the CFIA about regulatory policies" (10.5%). This analysis reveals that familiarity with the Agency is driven by clear guidance on regulations, representatives carrying their duties in a respectful manner, and engaging in open and honest dialogue about policies.

CFIA – A9 attribute drivers of A1 familiarity (total sample)

Statement	Share of importance (%)
CFIA guidance on regulations is clear	16.1
Representatives of the CFIA are respectful in carrying out their duties	15.0
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	10.5
Information received from the CFIA helps to stop future non-compliance	9.0
Representatives of the CFIA are helpful when providing information on regulations	7.7
The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain	5.9
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	5.3
The CFIA is sensitive to the reality of how things work in your specific industry	4.6
The decision-makers in my company feel that CFIA regulations are very complicated	4.3
CFIA regulations have been implemented in a way that is fair to all businesses	4.1
Overall, the CFIA is a fair regulatory agency	4.0
The CFIA is transparent in how they operate	3.8
The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities	3.5
The CFIA provides better service compared to food inspection agencies in other developed countries	2.9
The CFIA does business in the same way for everyone within their mandate	2.7
CFIA regulations are too basic for my company to be concerned about	0.6

Base: Total sample N=1575

In predicting trust in the CFIA among businesses, the primary drivers are again fairness and sensitivity this year. "Overall, the CFIA is a fair regulatory Agency" 12%, down slightly in terms of importance from last year, and "The CFIA is sensitive to the reality of how things work in your specific industry” (9% share), and “CFIA regulations have been implemented in a way that is fair to all businesses” (8%).

CFIA – A9 attribute drivers of A3 trust (total sample)

Statement	Share of importance (%)
Overall, the CFIA is a fair regulatory agency	12.3
The CFIA is sensitive to the reality of how things work in your specific industry	8.9
CFIA regulations have been implemented in a way that is fair to all businesses	8.4
The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities	7.8
Information received from the CFIA helps to stop future non-compliance	7.6
The CFIA is transparent in how they operate	7.4
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	6.8
Representatives of the CFIA are respectful in carrying out their duties	6.6
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	6.5
The CFIA does business in the same way for everyone within their mandate	6.0
The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain	5.9
CFIA guidance on regulations is clear	5.6
Representatives of the CFIA are helpful when providing information on regulations	5.0
The CFIA provides better service compared to food inspection agencies in other developed countries	3.3
The decision-makers in my company feel that CFIA regulations are very complicated	1.2
CFIA regulations are too basic for my company to be concerned about	0.6

Base: Total sample N=1575

Lastly, the top two drivers of businesses’ confidence in the CFIA are the same as last year although flipped in importance. “The CFIA is properly equipped to manage the complexity of Canada’s food, animal and plant supply chain” sits at the top with 15% share of importance and “Overall the CFIA is a fair regulatory Agency” (13% share of importance) moved to second position in terms of predicting of organizational confidence. The Agency needs to communicate that they are Competent and Fair to instill confidence among businesses.

CFIA – A9 attribute drivers of A6 confidence (total sample)

Statement	Share of importance (%)
The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain	15.2
Overall, the CFIA is a fair regulatory agency	13.2
CFIA regulations have been implemented in a way that is fair to all businesses	8.5
The CFIA does business in the same way for everyone within their mandate	7.5
The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities	7.4
The CFIA is sensitive to the reality of how things work in your specific industry	7.1
Information received from the CFIA helps to stop future non-compliance	6.9
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	6.2
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	6.0
The CFIA provides better service compared to food inspection agencies in other developed countries	5.2
The CFIA is transparent in how they operate	4.8
CFIA guidance on regulations is clear	4.8
Representatives of the CFIA are respectful in carrying out their duties	3.7
Representatives of the CFIA are helpful when providing information on regulations	2.9
CFIA regulations are too basic for my company to be concerned about	0.4
The decision-makers in my company feel that CFIA regulations are very complicated	0.2

Base: Total sample N=1,575

Business impression of CFIA staff / leadership and effectiveness

Consistent with previous years, CFIA Inspectors and Enforcement staff are notably considered the most credible and reliable members of the organization, with Senior management a close second place. Call Centre staff have the lead on being most responsive by nature of their role in the Agency.

A10 Consider your interactions with the CFIA and its leadership structure. Select the responses that you feel describe each:

	Is credible	Is responsive	Is reliable	N=
CFIA inspectors / enforcement staff	51%	52%	54%	1214
CFIA Senior Management	48%	46%	51%	947
Call Centre Staff	36%	60%	46%	757

Base: Differs by presence of interactions with staff

Across business lines, between 73% and 85% (5, 6, or 7 on a 7-point scale) agree that “CFIA enforcement activities encourage companies to comply with the regulations”. Similarly, 75% and 81% of businesses agree that “The CFIA is contributing to the health and well-being of Canadians, the environment and the economy by protecting Canada's food, animals and plants”. About 3 in 4 believe that “As a science-based regulator, the CFIA is believable when it issues a statement”.

In terms of specific lines of business statements, “The CFIA issues food recall warnings in a timely manner” gets 77% agreement from Food businesses, and equivalently “The CFIA enforces regulations that help to ensure that Canada's plant resources are protected” gets 78% from Plant businesses. However, Animal businesses only give an agreement rating of 62% for “The CFIA enforces regulations that help to ensure that animals are transported humanely”.

B1 How much do you agree or disagree with each of the following statements?

	Total	Food	Animal	Plant
CFIA enforcement activities encourage companies to comply with the regulations	81%	85%	73%	77%
The CFIA is contributing to the health and well-being of Canadians, the environment and the economy by protecting Canada's food, animals and plants	80%	81%	75%	81%
As a science-based regulator, the CFIA is believable when it issues a statement	77%	80%	69%	77%
The CFIA issues food recall warnings in a timely manner	73%	77%	64%	67%
The CFIA enforces regulations that help to ensure that Canada's plant resources are protected	70%	71%	58%	78%
The CFIA enforces regulations that help to ensure that animals are transported humanely	61%	61%	62%	58%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

An important metric measured again this year is Transparency. Businesses believe that the CFIA is transparent 75% (5, 6, or 7 on a 7-point scale) when it comes to assessing non-compliance with regulations. This is an increase of 5% over last year's rating. Likewise, there is a similar increase by line of business; Food business (79%, +7%) and Animal (65%, +3%) and Plant (70%, +3%) businesses. Among businesses owned by Indigenous persons, the transparency rating was significantly higher (88%).

B2 - In your opinion, how transparent do you think the CFIA is when it comes to assessing non-compliance with regulations?

	Total	Food	Animal	Plant
1 Not at all transparent	2%	2%	4%	1%
2	2%	1%	4%	1%
3	3%	3%	5%	3%
4	18%	15%	22%	23%
5	23%	22%	28%	25%
6	27%	29%	23%	25%
7 Very transparent	24%	28%	14%	21%
T3B (5,6,7)	75%	79%	65%	70%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

In thinking about transparency in reporting (publishing) non-compliance, businesses gave a similar rating 73% (5, 6, or 7 on a 7-point scale). This is consistent with the previous year's results. Food business (78%) rated this metric higher than Animal businesses (62%) and Plant (65%) businesses. Once again the Indigenous-owned businesses gave a higher rating for transparency of CFIA reporting (87%).

B3 - How transparent do you think the CFIA is when it comes to reporting (publishing) non-compliance?

	Total	Food	Animal	Plant
1 Not at all transparent	3%	2%	4%	2%
2	2%	1%	3%	1%
3	3%	3%	5%	4%
4	20%	16%	27%	27%
5	22%	21%	28%	22%
6	25%	28%	20%	23%
7 Very transparent	25%	29%	14%	20%
T3B (5,6,7)	73%	78%	62%	65%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Next businesses were asked to rank the importance of services offered by the CFIA. Among the top ranked services are “I can contact a CFIA representative for clarification” (35% ranked #1 and 78% ranked 1,2 or 3), followed by “Services are available when I need them” (22% ranked #1 and 70% ranked 1,2 or 3) and “I can access all of the services offered by CFIA in one place” (15% ranked #1 and 53% ranked 1,2 or 3). The Agency should focus on contact and service availability awareness as they are of utmost importance to businesses when it comes to CFIA services.

B8 - Please rank the top 3 service elements. When your company assesses the services offered by the Canadian Food Inspection Agency (CFIA), which elements are the most important?

	Rank 1	Rank 2	Rank 3	Rank 1,2,or 3
I can contact a CFIA representative for clarification	35%	26%	17%	78%
Services are available when I need them	22%	24%	24%	70%
I can access all the services offered by the CFIA in one place	15%	18%	21%	53%
The services are easy to understand	14%	16%	18%	49%
The services offered by CFIA help prevent non-compliance	13%	16%	15%	43%
Other	2%	1%	4%	7%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Assessment of CFIA communications and relations with industry

A TURF analysis was used to understand the reach of satisfaction with different modes of communication with the CFIA. Comparing top 3 box scores (5, 6, or 7 on a 7-point scale) show that most of the satisfaction is driven through email (71%) again this year. An additional 4% is contributed from Personal interaction with CFIA representative, then an additional 3% from the CFIA website, and 2% from the Portal notices in My CFIA. At this point the incrementality levels off, indicating that a focus on the top 3-4 modes of communication is the most efficient way to drive satisfaction.

Business B7 Satisfaction with Communication - Incremental Reach (T3B%)

Source	Incremental Reach	Cumulative Reach
Email (including CFIA Listservs)	70.4%	70.4%
Personal interaction with CFIA representative	4.6%	75.1%
CFIA website	3.3%	78.4%
Portal notices in My CFIA	2.1%	80.5%
Mailed documents	1.9%	82.4%
Telephone communications	1.2%	83.6%
Through an industry association	0.8%	84.4%
Social media	0.1%	84.5%
CFIA's Inspect and Protect newsletter	0.1%	84.5%
Podcasts	0.0%	84.5%

Base: Total sample N=1575

In thinking about overall satisfaction with CFIA communications (8, 9 or 10 on a 10-point scale) shows that nearly 6 in 10 (57%) businesses are very satisfied with the tools the CFIA uses to communicate. This year the scale of this question was changed, and so does not compare to past results. The food industry businesses have the highest satisfaction (62%) vs the animal industry (44%) and plant industry (53%).

B6 - What is your overall level of satisfaction regarding the communication tools that are used by the CFIA?

	Total	Food	Animal	Plant
0 Not at all satisfied	2%	1%	4%	3%
1	1%	1%	3%	0%
2	2%	1%	2%	3%
3	3%	2%	5%	3%
4	3%	2%	4%	4%
5	8%	8%	8%	10%
6	9%	8%	10%	10%
7	15%	14%	19%	15%
8	20%	20%	17%	21%
9	16%	16%	15%	13%
10 Very satisfied	22%	25%	13%	19%
T3B (8,9,10)	57%	62%	44%	53%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Across all three industries, businesses are divided on the best way to have more open and clear discussions with the CFIA. Conducting informal quarterly consultations (33%), Conducting formal consultations (31%), and industry association events (25%) were all equally chosen.

B10 - When trying to understand new requirements and regulatory priorities, what is the best way to have more open and clear discussions with CFIA regulators?

	Total
Informal quarterly consultations	33%
Formal consultations	31%
Industry association events	25%
Other	5%

Not applicable: I wish the CFIA would not send me any future communications	5%

Base: Total sample N=1575

Webinars on "Import requirements" were chosen again this year as the most interesting of the topics displayed (46% overall) and 55% of animal businesses would be interested. Additional topics of interest were "How to use my CFIA portal to apply for licences and other permissions" (44%), Labelling (39%) which had more interest among food business and lower interest among plant and animal businesses. Less interesting topics were "Preventive control plans" (37%) overall, and "Traceability" (29%) overall. Once again both topics were more interesting to the Food businesses.

B11. If the CFIA was holding webinars, what topics would drive the most interest? Select all that interest you.

	Total	Food	Animal	Plant
Import requirements	46%	42%	55%	51%
How to use MY CFIA portal to apply for licences and other permissions	44%	42%	51%	48%
Labelling	39%	45%	27%	32%
Preventive control plans	37%	44%	24%	25%
Traceability	29%	34%	21%	21%
Other	3%	2%	4%	4%
Don't know / Prefer not to say	12%	12%	12%	14%

Base: Total sample N=1575, Food N=1010, Animal N=277, Plant N=288

Appendices

Sample profiles

Profile of consumer sample (S1a, S2, C1, X2-X8)

S1a Would you be willing to indicate in which of the following age categories you belong?

		Region					Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) 18 to 24	11%	11%	11%	11%	11%	11%	39% BC	0%	0%	7%	14% A
(2) 25 to 34	17%	17%	17%	17%	17%	17%	61% BC	0%	0%	11%	22% A
(3) 35 to 44	17%	17%	17%	17%	17%	17%	0%	52% AC	0%	15%	19% A
(4) 45 to 54	16%	16%	16%	16%	16%	16%	0%	48% AC	0%	19% B	14%
(5) 55 to 64	17%	17%	17%	17%	17%	17%	0%	0%	44% AB	19% B	16%
(6) 65 or older	22%	22%	22%	22%	22%	22%	0%	0%	56% AB	30% B	16%

S2 In which province or territory do you live?

		Region					Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) British Columbia	14%	100% BCDE	0%	0%	0%	0%	14%	14%	14%	14%	13%
(2) Alberta	11%	0%	60% ACDE	0%	0%	0%	12%	11%	11%	11%	11%
(3) Manitoba	4%	0%	22% ACDE	0%	0%	0%	4%	4%	5%	5%	4%
(4) Saskatchewan	3%	0%	18% ACDE	0%	0%	0%	3%	4%	3%	3%	4%
(5) Ontario	39%	0%	0%	100% ABDE	0%	0%	39%	39%	39%	39%	39%
(6) Quebec	22%	0%	0%	0%	100% ABCE	0%	22%	22%	22%	22%	22%
(7) New Brunswick	2%	0%	0%	0%	0%	33% ABCD	3%	2%	2%	2%	2%
(8) Prince Edward Island	0%	0%	0%	0%	0%	2% ABCD	0%	0%	0%	0%	0%
(9) Nova Scotia	3%	0%	0%	0%	0%	42% ABCD	2%	3%	3%	2%	3%
(10) Newfoundland and Labrador	1%	0%	0%	0%	0%	23% ABCD	1%	2%	1%	1%	2%
(11) Yukon	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(12) Northwest Territories	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(13) Nunavut	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(14) Outside Canada	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(15) Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

C1 Which of the following statements best describes your role and responsibility when it comes to grocery shopping for your family or household?

		Region					Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) I am solely responsible	54%	53%	50%	54%	56%	59% B	46%	58% A	56% A	47%	59% A
(2) I share in this responsibility	40%	41%	45% CD	39%	38%	38%	44% B	38%	40%	47% B	35%
(3) Somebody else in my family or household looks after grocery shopping	4%	6% E	4%	5% E	4%	2%	8% BC	3%	3%	5% B	4%
(4) Prefer not to say	1%	1%	1%	1%	2%	1%	2% C	1%	1%	1%	2% A

X2 What is the highest level of formal education that you have completed?

		Region					Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) Less than a high school diploma or equivalent	3%	2%	4% AC	2%	5% AC	3%	3%	3%	3%	4%	3%
(2) High school diploma or equivalent	23%	22%	28% CD	21%	22%	23%	27% B	18%	24% B	22%	24%
(3) Registered apprenticeship or other trades certificate or diploma	6%	4%	6% C	4%	11% ABC	10% AC	4%	6%	8% A	7%	6%
(4) College, CEGEP or other non-university certificate or diploma	25%	23%	24%	24%	27%	26%	21%	24%	28% A	23%	27% A
(5) University certificate or diploma below bachelor's level	5%	6%	6%	5%	6%	4%	6% C	6%	4%	5%	5%
(6) Bachelor's degree	26%	31% BC	22%	30% BD	20%	24%	27% C	30% C	22%	27%	25%
(7) Graduate degree above bachelor's level	11%	11%	8%	14% BD	8%	10%	10%	12%	10%	12% B	10%
(8) Prefer not to answer	1%	1% E	1%	0% E	1% E	0%	1%	1%	0%	0%	1% A

X3 What language do you speak most often at home?

		Region					Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) English	77%	94% D	97% ACD	94% D	13%	97% ACD	78%	77%	77%	77%	77%
(2) French	22%	2%	2%	3%	90% ABCD	7% ABC	21%	22%	23%	22%	22%
(3) Other	5%	9% BDE	4% E	6% BDE	2% D	0%	8% BC	4%	3%	4%	5%
(4) Prefer not to answer	0%-	0%	0%	0%	0%	1%	1% BC	0%	0%	0%	0%

X4 Which of the following best describes your total household income last year, before taxes, from all sources for all household members?

		Region					Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) Under $20,000	7%	6%	7%	6%	8%	13% ABC	12% BC	6% C	4%	6%	8% A
(2) $20,000 to just under $40,000	17%	16%	16%	15%	20% C	18%	17% B	11%	21% B	14%	19% A
(3) $40,000 to just under $60,000	17%	16%	17%	16%	17%	23%	16%	14%	20% AB	17%	17%
(4) $60,000 to just under $80,000	14%	13%	17% D	14%	13%	14%	16% C	15%	13%	14%	15%
(5) $80,000 to just under $100,000	13%	14% E	12%	13% E	14% E	8%	12%	14%	13%	14%	12%
(6) $100,000 to just under $150,000	17%	17%	15%	19% BE	16%	13%	16%	21% AC	14%	19% B	15%
(7) $150,000 and above	10%	12% DE	11% D	11% D	7%	7%	6%	15% AC	8%	11%	9%
(8) Prefer not to answer	6%	6%	5%	6%	6%	5%	5%	5%	7% AC	5%	6%

X5 Are you an Indigenous person?

	Region						Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) Yes	5%	4%	8% ACD	4%	3%	7%	10% BC	4% C	1%	4%	6% A
(2) No	95%	96% B	92%	96% B	97% B	93%	90%	96% A	99% AB	96% B	94%

X6 You indicated that you are an Indigenous person. Please specify the group to which you belong.

	Region						Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	145	16	48	48	20	13	85	42	17	50	91
First Nations (North American Indian)	51%	59%	48%	53%	53%	46%	51% C	63% C	22%	61%	44%
Métis	37%	33%	47%	30%	32%	36%	35%	27%	68% AB	28%	43%
Inuk (Inuit)	5%	8%	4%	5%	11%	0%	5%	3%	10%	8%	4%
Other (Specify)	7%	0%	2%	12%	4%	18%	8% C	7%	0%	4%	9%

X7 Are you a member of a visible minority group?

	Region						Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3003	410	564	1178	657	194	841	991	1171	1349	1639
(1) Yes	20%	26% BDE	19% DE	26% BDE	10%	9%	32% BC	23% C	9%	19%	21%
(2) No	80%	74%	81% AC	74%	90% ABC	91% ABC	68%	77% A	91% AB	81%	79%

X8 You indicated that you are a member of a visible minority group. Please select the box(es) that apply to you.

	Region						Age			Gender	
Column %	**NET**	**BC**	**Prairies**	**Ontario**	**Quebec**	**Atlantic**	**18-34**	**35-54**	**55+**	**Male**	**Female**
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	599	108	105	303	67	17	269	227	103	258	337
Chinese	27%	37% DE	24% E	27% DE	17%	5%	17%	35% A	33% A	27%	27%
South Asian/East Indian	20%	23% D	16%	24% D	7%	8%	27% B	12%	20%	24%	18%
Black	17%	5%	15% A	19% A	28% A	25%	17%	19% C	11%	15%	18%
Filipino	8%	9%	16% C	5%	8%	6%	8%	8%	6%	9%	7%
Other visible minority group (specify)	6%	7% B	1%	5% B	12% B	21% B	4%	8%	6%	6%	6%
Person of mixed origin (with 1 parent in 1 of the visible minority groups)	7%	9%	4%	8%	3%	21%	9%	5%	7%	5%	8%
Southeast Asian	4%	4% E	6% E	3% E	3%	0%	4%	2%	5%	4%	3%
Non-White West Asian, North African or Arab	5%	3%	6% E	4% E	14% ACE	0%	6%	5%	4%	5%	5%
Non-White Latin American	8%	7%	10%	5%	11%	27%	11% BC	4%	5%	6%	9%
Japanese	3%	4% E	2%	3% E	2%	0%	2%	2%	6%	2%	3%
Korean	2%	3%	4%	1%	1%	7%	2%	1%	4%	2%	2%

Profile of business sample (S3, X1-X13)

Specific profiling details of the sample used for the business section of this report is 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.

S3 What industry segments does your company operate in?

Column %	Total	FOOD	ANIMAL	PLANT
Food preparation	13%	13%		
Food importing	43%	43%		
Food exporting	20%	20%		
Interprovincial trade of food	16%	16%		
Food manufacturing	27%	27%		
Farming	13%	13%		
Food/beverage manufacturing or processing	19%	19%		
Meat and poultry slaughter	2%	2%		
Live animal importing	36%		36%	
Live animal exporting	23%		23%	
Germplasm (genetic material) import	9%		9%	
Germplasm (genetic material) export	6%		6%	
Animal product or by-product importing	23%		23%	
Animal product or by-product exporting	12%		12%	
Live animal domestic management	9%		9%	
Animal product or by-product preparation or manufacture	8%		8%	
Animal feed (including feed mills and feed sellers)	10%		10%	
Pet food import	6%		6%	
Pet food export	3%		3%	
Animal transportation (including freight forwarders)	7%		7%	
Artificial insemination centres	3%		3%	
Veterinary biologics	5%		5%	
Horse owners	6%		6%	
Small flock owners (including bird collections)	3%		3%	
Fertilizers and supplements	17%			17%
Forestry products	6%			6%
Horticulture (greenhouse, nursery, bulbs, fruit trees, grapevines)	31%			31%
Crops (grains, oilseeds)	15%			15%
Potatoes	7%			7%
Seed growing (other than seed potato)	9%			9%
Seed establishments/ handling	6%			6%
Plant breeding	10%			10%
Plant breeders' rights (intellectual property)	6%			6%
Invasive species prevention and management	1%			1%
Other (specify)	16%	9%	23% A	33% AB
NET	100% -	100% -	100% -	100% -
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X1 Approximately how many people are employed by your company?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(1) Sole proprietor / just me	12%	13%	12%	9%
(2) 2 to 9	38%	40% BC	33%	33%
(3) 10 to 49 employees	27%	25%	29%	33% A
(4) 50 to 99 employees	8%	9%	9%	6%
(5) 100 to 499 employees	8%	8%	8%	10%
(6) 500 to 999 employees	1%	1%	2%	1%
(7) 1000 to 4999 employees	1%	1%	2%	1%
(8) 5000+ employees	2%	1%	4% A	3% A
(9) I do not know/ Prefer not to answer	3%	3%	2%	3%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X2 What is the approximate annual revenue of your company?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(1) Less than $100,000	16%	17%	13%	15%
(2) $100,000 to $499,999	16%	18% BC	11%	11%
(3) $500,000 to $999,999	9%	9%	8%	11%
(4) $1 million to less than $25 million	32%	31%	31%	33%
(5) $25 million to less than $100 million	5%	4%	6%	6%
(6) $100 million or more	3%	2%	5% A	3%
(7) I do not know/ Prefer not to answer	20%	17%	27% A	21%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X3 How long has your company been in operations?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(10) Less than a year	4%	5%	3%	3%
(11) More than 1 but less than 5 years	15%	15% B	8%	18% B
(12) 5 or more years but less than 10 years	14%	16% BC	9%	8%
(13) 10 or more years but less than 25 years	27%	27%	27%	25%
(14) More than 25 years	39%	34%	52% AC	42% A
(15) I do not know/ Prefer not to answer	2%	2%	1%	3%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X5r In which regions does your company currently do business?

	Industry Segment			
Column %	Total	FOOD	ANIMAL	PLANT
British Columbia	33%	33%	35%	33%
Alberta	28%	26%	39% AC	27%
Saskatchewan	18%	14%	26% A	23% A
Manitoba	18%	16%	23% A	21% A
Ontario	50%	49%	49%	53%
Quebec	34%	31%	36%	40% A
New Brunswick	13%	11%	20% AC	14%
Prince Edward Island	11%	9%	16% A	11%
Nova Scotia	15%	13%	21% AC	14%
Newfoundland and Labrador	9%	8%	15% AC	8%
Yukon	4%	4%	6%	4%
Nunavut	3%	3%	5%	3%
Northwest Territories	4%	4%	5%	4%
United States of America	21%	17%	28% A	26% A
Outside of the United States of America or Canada	11%	8%	18% A	15% A
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X6r And in which regions does your company have offices/facilities where CFIA food safety regulations are applicable?

	Industry Segment			
Column %	Total	FOOD	ANIMAL	PLANT
British Columbia	20%	20%	18%	21%
Alberta	14%	13%	21% AC	13%
Saskatchewan	6%	4%	8% A	9% A
Manitoba	6%	6%	7%	7%
Ontario	37%	36%	38%	39%
Quebec	21%	20%	21%	24%
New Brunswick	4%	3%	6% A	4%
Prince Edward Island	3%	2%	4%	3%
Nova Scotia	5%	5%	8% AC	3%
Newfoundland and Labrador	1%	1%	3% A	1%
Yukon	1%	0%	1%	0%
Nunavut	0%	0%	1% A	0%
Northwest Territories	0%	0%	1%	1%
United States of America	8%	8%	8%	10%
Outside of the United States of America or Canada	3%	3%	3%	6% A
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X7 What is the ownership status of your company?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(1) Publicly-traded	4%	4%	5%	5%
(2) Privately-held	83%	85% B	79%	82%
(3) Government/Crown	1%	0%	4% A	3% A
(4) Not sure	11%	11%	13%	10%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X8 Is your company based in Canada, or does it have its headquarters elsewhere?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(1) Headquarters located in Canada	88%	88%	89%	89%
(2) Headquarters located outside of Canada	10%	10%	10%	10%
(3) Not sure	2%	2%	1%	1%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X9 Would you consider the organization to be a family-owned organization?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(1) Yes	67%	69% BC	62%	63%
(2) No	27%	24%	34% A	33% A
(3) Do not know / Not sure	6%	7% B	4%	5%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X10 Would you describe your company as Indigenous managed or owned?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(1) Yes	6%	8% BC	4%	2%
(2) No	87%	84%	92% A	93% A
(3) Unsure	7%	9% BC	3%	4%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X11 For statistical purposes only, what is your gender?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
(1) Male	54%	55%	53%	51%
(2) Female	35%	36%	32%	33%
(3) Other	1%	1%	1%	1%
(4) Prefer not to answer	10%	8%	14% A	14% A
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

X12 Approximately, what percentage of individuals might identify as a visible minority in senior management (including owner) roles?

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
0%	29%	25%	32% A	39% A
1-19%	4%	4%	5%	3%
20-39%	5%	4%	6%	6%
40-59%	7%	8% B	4%	5%
60-79%	1%	2% C	1%	0%
80-100%	12%	14% BC	7%	8%
Don’t know	42%	42%	45%	38%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

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

	Industry Segment			
Column %	**Total**	**FOOD**	**ANIMAL**	**PLANT**
0%	14%	14%	10%	15%
1-19%	8%	8%	7%	11%
20-39%	11%	11%	9%	14%
40-59%	23%	22%	29% AC	21%
60-79%	5%	6%	5%	5%
80-100%	9%	10% B	6%	8%
Don’t know	29%	30%	33%	26%
NET	100%	100%	100%	100%
Column Population	1575	1010	277	288
Column Names	A	A	B	C

Statistical analysis definitions

Included here are definitions and explanations of how the TURF and key driver analysis were conducted.

TURF

TURF is an acronym for “Total Unduplicated Reach and Frequency.” It is an optimization algorithm for finding subsets of items/attributes that “reach” the maximum number of respondents possible. In the context of TURF, “reach” can be defined in various ways. For example, it may be defined as ratings of “4” or “5” (for Top 2 Box) on a 5-point scale.

Once reach has been defined, TURF is applied to respondent-level data to analyze reach (and frequency) for all possible subsets of a certain size. The TURF algorithm counts how many respondents are reached by each possible subset and then rank orders the subsets in terms of overall reach. As a result, TURF is typically used to answer questions like, “Which subset of 5 attributes out of 30 is best in terms of maximizing reach?”

The “frequency” part of TURF simply refers to the number of times respondents are reached for a particular combination of items/attributes. If 2 subsets have equal reach, then the subset with higher frequency should be preferred. Accordingly, the TURF algorithm rank-orders subsets in terms of reach first, followed by frequency.

In practice, TURF often reveals multiple solutions with equal or nearly equal reach. At face value, this may seem problematic in terms of identifying an optimal subset. This can also be seen as an opportunity, however, because it allows for other relevant business information to help “break the tie”. For example, if subsets “A” and “B” result in roughly equal reach but subset “A” would be quicker and more inexpensive to implement, then subset “A” should be preferred.

Key driver analysis

The basic problem in a derived relative importance analysis (for example, drivers analysis) is to assess the contribution of each driver’s influence on an outcome of interest. An intuitive way to quantify driver contribution is to use the portion of explained variance (for example, R-squared) attributed to each driver. Variance decomposition techniques, such as LMG and Johnson's Relative Weights, are computationally intensive analyses that are used to measure relative importance in the context of marketing research studies. These techniques define driver "relative importance" as the share of explained variance (for example, R-squared) attributed to each driver in the model.

Methodology

Quantitative methodology

The CFIA Reputation study involved two surveys, one for businesses and the other for consumers.

The consumer portion of the study was conducted as an online web survey using the Dynata panel of respondents. The desired sample structure is available below. A total of 3,003 completed surveys were collected across Canada between February 24th and March 6th, 2023. The average survey length among consumers was 9 minutes.

	Target Competes	Actual Completes
Total	3000	3003
Age		
18 to 24	320	246
25 to 34	520	517
35 to 44	504	515
45 to 54	490	468
55 to 64	488	530
65+	679	727
Region		
British Columbia	409	410
Prairies	549	564
Ontario	1164	1178
Quebec	678	657
Atlantic	193	194
Territories	*Track*	0
Gender		
Male	1428	1372
Female	1531	1617
Other	*Track*	12
Prefer not to answer	*Track*	2

Weighting

Data from the consumer quantitative survey was weighted to balance the sample so that it represents the characteristics of the Canadian population. The Consumer sample (N=3003) was weighted using Stats Can proportions for age and gender. This weighting was carried across regions to account for regional differences during fielding.
Results were weighted to reflect the following:

Region	Population %
Alberta	12%
Atlantic	6%
British Columbia	14%
Manitoba	4%
Ontario	39%
Quebec	23%
Saskatchewan	3%
Territories	0%
Grand Total	100%

Gender	Population %
Male	50%
Female	50%
Grand Total	100%

Age Groups	% of Total
18-24	11%
25-34	17%
35-44	17%
45-54	16%
55-64	17%
65+	22%
Grand Total	100%

The business survey consisted of an online survey where respondents were sent email invitations directly by the Canadian Food Inspection Agency (CFIA), with three rounds of reminders sent. The Canadian Food Inspection Agency (CFIA) sent out email invitations to recruit their customers to the survey using the links provided by the Logit Group for each category – Food, Animal and Plant. A total of 36,078 links were provided. There were a total of 2700 clicks from which 1575 respondents completed the survey.

The average survey length for the business study was 13.5 minutes. Data was collected between February 20th and March 9th, 2023.

Below is a breakdown *of responses* for the Business study:

	Total	Food businesses	Animal health businesses	Plant health businesses
Total	1575	1010	277	288
English	83%	84%	82%	79%
French	17%	16%	18%	21%

There was no weighting applied to the business quantitative data.

Qualitative methodology

Chosen method

Given the objectives set out for this study, the time and resources available, online focus group methodology was chosen as the optimum approach. All participants were met in focus groups of between 3 and 5 participants each – a somewhat smaller than usual size, but necessary given the constraints of the COVID-19 pandemic and the need to conduct these interviews over the Internet.

Number, location and composition of groups

For this year's study, the qualitative process was organized as follows:

- 8 focus groups with consumers. These consumers were recruited via cold-call contacts and were designed to ensure that Canadians from different areas of the country, walks of life, ages and income levels participated. 6 of these groups were held in English and 2 in French.
- 8 focus groups with different representative of businesses that work in the plant and animal lines (as defined by the Agency). These participants were recruited either from the survey (from those who volunteered to participate in follow-up research), invitations emailed to Agency contacts, or via cold-calls to pre-identified businesses.

Recruiting screener

Recruiting screening questionnaires designed to facilitate the recruiting process were developed prior to the start of the process and approved by the contracting authority. Copies of these are appended to this report.

Incentive fees

Consumers were offered $150 for their participation – in order to encourage participation in our request that they undertake modest research of plant and animal safety related issues prior to our discussions. Business operators and association personnel were offered $200 for their participation.

Moderating and analysis

John Patterson moderated all interviews and was solely responsible for the analysis of results and related reporting.

Qualitative instruments

Consumer Screener

Final Version
February 2023

DISCUSSION GUIDE OUTLINE

Dates: **February 7, 8 (13:00 and 17:00), 9: 17:30 and 19:30**
Client: **Canadian Food Inspection Agency (CFIA)**
Locations: **National: Mini Focus Groups with Canadian Consumers on Food Safety, Plant & Animal Health and the Agency's reputation**

Qualitative research with consumers is required to understand the diverse ways they evaluate the safety of the Canadian food supply, the health of Canadian crops and animals, and the role that the CFIA plays in that. Qualitative data will be collected through virtual mini focus groups and that reflect the diversity of Canadians.

Research Objectives:

- Explore Canadians' understanding of food safety.
- Explore Canadians' understanding of animal health.
- Explore Canadians' understanding of plant health.
- Explore Canadians' understanding of the CFIA and its repuation.
- Understand what consumer concerns, value and beliefs are contributing to these questions and how.

Introduction (15-20 min.)

1. **Introduction of moderator, name and type of research firm**: (i.e. John representing the marketing research firm Patterson Langlois)

2. **Set up**: We're here to talk about the safety of Canada's food supply. The purpose of these discussions is to help the Government of Canada better understand how Canadians understand safe food and their trust that Canada's food supply is indeed safe. Your input is important and very much appreciated.

3. **Explanation of the process:**

- **Conversation recorded:** This conversation will be recorded, but will be used per the *Privacy Act* and the *Personal Information Protection and Electronics Documents Act*.
- **Voluntary participation and consent to recording**: Before we begin, I will turn on the recording for this group. This is just a working tool for me and allows me to focus on the conversation and not take too many notes. Assuming you are ok with that? By the way, you are of course free to leave this discussion at any time.
- **Anonymity**: Although we mean to listen to and use your opinions here, you have a strict guarantee of anonymity. The fact that you participated in this process or what you say will not be made public.
- **Disclaimer of observers**: Observers may be on this call and hidden from view. Their presence is to directly hear what you have to say but mostly to ensure that I ask the right questions, cover all of the bases, etc.
- **Role of moderator and participants**: I am here as a professional researcher. I am not a Government employee and I am here precisely because I am neutral and objective. I have no vested interest in how you respond to my questions. I am here to ask questions, not provide answers. You are here to speak for yourselves.
- **Expression of opinions**: there are no wrong or right answers, and no expectation that you agree with each other.
- **Length**: we will be here for about 90 minutes.
- **Assess familiarity with Zoom**. *For focus groups*: Be aware that having a group discussion on Zoom requires us to use the available features if we want this to go smoothly. Please "raise your hand" using the Zoom feature if you have something to say.

4. **Round-table introduction of participants**:

- Please start by introducing yourself and your household.

Probes:

- What do you --- and your spouse --- do for a living?
- What's the size and composition of your family?
- Do you have any allergies, dietary and/or other food related intolerances?
- What kind of lifestyle do you live?

PART 1: Food in your life (15-20 minutes)

Although I know we said that we wanted you here to discuss food safety and related topics, we also know and want to spend some time understanding you as a group and the <u>*different*</u> *ways you think about food, buy your food, make your food and so on.*

First, let's start with a quick exercise.

1. Off the top of your head, what are some things you associate with when you think of the term "bad food"?

Probe: what would you do if you found a foreign object in food you had purchased

2. And what are some things you associate with when you think of "good food"?

[*If not mentioned, please PROBE for the following concepts*] How much of what you consider "good food" is determined by:

- Price
- Source
- Season/Time of the year
- Food group (e.g., protein, starches, sugars, etc)
- Culture and/or your family background
- Variety (would you usually stay with what your family likes or are you willing to try new things a lot?)
- Size and location of producers (Do you prefer buying/eating food that's produced locally?)
- Dietary implications (calories, fat content, etc.)
- Taste
- Freshness

- Would you say that you are adventurous or are you less willing to try new things when it comes to food?
- Do you care a lot about food or is it just something you take care of with minimum effort?

- Is the cost of food a big deal for you or not?
- Do you read, think or worry about ingredients or nutritional value? What are you looking for?
- What would I learn from watching you buy food? Where do you go? What do you think guides those choices? Etc.

Food Related Worries:

- Okay, so what kind of things do you worry about when it comes to food?

[*Round table, probes*]

- Any worries specific to the kind of food you're buying:
  - Meats
  - Vegetables
  - Dairy
  - Fish
  - Etc.
- Anything about farming practices? Do you think about the treatment of farm livestock/animals – whether they're ethical or not?
- Do you think about animal or plant diseases?
- Do you think about how farms are regulated?
- What about dietary/ health related worries?
- Anything about where --- or what kind of company --- your food comes from?
- Anything else?

PART 2 - Food Safety Regulation: (15-20 minutes)

Let's now talk about how food safety is assured in Canada. I want to make it clear right up front that I don't expect anyone to have detailed knowledge of this topic: this is more about the way you think about food safety and related regulations, and the different ways we might imagine this. Of course, we can also talk about what you know or have strong impressions about….

- Can someone paint the picture they have off the top of their minds about how food is made safe in Canada? [*Round table, probes as follows*]

- **Responsible parties**: What organizations and at what level of government are responsible for ensuring that food is safe in Canada? How big do you think are these organizations? [*Probe for details and divergent opinions. Check for unaided CFIA awareness.*]

- **Presumed activities**: What do these organizations do? (Again, reassure that we're ok with impressions). How involved are they in the businesses they regulate?
- Generally-speaking, do you think enough is being done? Why? Why not? Let's think specifically about different kinds of food [*probe for meats, fish, vegetables, etc.*]. Anything else?

- **Examples of Unsafe Food (incidents or otherwise):** What kinds of things signal "unsafe" food to you? How about those of you that worry about "X"? [*PROBE: food fraud instances.*]
  Fines levied against food related busineses? Contaminations? What else?

- How would you define **food recall**? When do they happen? What do they mean about the safety of Canada's food supply? Is this a sign that the system is working or not working? What kind of dangers to Canadians' health do you associate with a recall?

- What kind of dangers to Canadians' health do you associate with a recall? How do you find out about food recalls? For example, through news media (TV, newspapers, radio)? Social media? Do you subscribe to the CFIA's food recall alerts?
- Has anyone heard about restrictions about seeds and borders or traveling overseas with pets?
- Would you say that there is a **difference between "safe food" and "unhealthy food"?**

- What about between "unsafe" and "poor quality"? Where do they interect? How has your thinking about this changed over time, if at all?

  Have you heard anything lately that caused you to reconsider any of this?

Understanding of CFIA Mandates (10-15 Minutes)

Does anyone have an idea about other food related activities and regulations that Government (Agency) might be accountable for? What might they be?

[*Probe for the following, if not mentioned and discussed thoroughly*]

- Monitoring the health of animals and plants imported to and exported from Canada
- Overseeing the transportation of animals
- Overseeing seed and breeding stock and the genetic health of plants and animals
- Artificial insemination of animals

- Oversight of fertilizer and pesticide use
- Invasive pests, parasites, etc. such as the Emerald Ash Borer or Japanese Beetle
- Transportation of pets across international border
- Probe for Potato Wart
- Probe for Avian Influenza

WRAP UP (10 Minutes)

So by now I suppose it's clear that this research is being commissioned by the CFIA ("Canadian Food Inspection Agency").

What do you think we've learned about this agency, its reputation and the how reputation is being communicated?

[*PROBE along the following topics*]

- **Specific Role**: What is it accountable for?
- **Comprehensiveness**: How wide and broad is its mandate?
- **Organization**: What do you understand of how the CFIA is structured and how it operates? How long has it been there for? Awareness of the 25th anniversary that happened in April 2022? Seen any content on social media about Inspect and Protect, such as articles, artistic cartoons/trading cards? How big is it? Etc.
- **Credibility?**
- **Authorship:** How much it owns it's communications and how much of it seems colored by other sources?
- **Institutional priority topics and audiences**: As you recall all of the things we've discussed, what do you think the CFIA is focused on – either in terms of issues or audiences? What do we think about that? How do people expect to hear from the CFIA on the issues they care about? How they want the info packaged/shared? Awareness of CFIA emails/newsletters, social media presence, videos, an official podcast – under the Inspect and Protect umbrella
- **Any additional topics, concerns or issues**?

Before we end this, allow me to remind you that this is Government research, and that you are entitled to both protection under the Privacy Act, and access to this research once the process has run its course. A report will be available under the Access to Information Act or from Library and Archives Canada. Most of all, please accept my thanks for your time and good will.

THANK AND TERMINATE

Have you heard of any of the following new or emerging foods?

- Insect protein (that is, protein made from insects)
- Cultured meat (that is, meat that has been created or grown in a laboratory)
- Cultured dairy (that is, dairy that has been created or grown in a laboratory)
- Genetically modified fruit or vegetables
- Genetically modified meat or dairy
- 3D printed foods

How confident would you be in the safety of the following foods if you saw them for sale in Canadian shops and supermarkets?

- Insect protein (that is, protein made from insects)
- Cultured meat (that is, meat that has been created or grown in a laboratory)
- Cultured dairy (that is, dairy that has been created or grown in a laboratory)
- Genetically modified fruit or vegetables
- Genetically modified meat or dairy
- 3D printed foods

Consumer Discussion Guide

Patterson, Langlois Consultants

Draft Version
December 2023

DISCUSSION GUIDE OUTLINE

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   - **Anonymity**: Although we mean to listen to and use your opinions here, you have a strict guarantee of anonymity. The fact that you participated in this process or what you personally say will not be made public.
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   - **Role of moderator and participants**: I am here as a professional researcher. I am not a Government employee and I am here precisely because I am neutral and objective. I have no vested interest in how you respond to my questions. I am here to ask questions, not provide answers. You are here to speak for yourselves.
   - **Expression of opinions**: there are no wrong or right answers, no expectation that you agree with each other.
   - **Length**: we will be here about 90 minutes.

- **Assess familiarity with Zoom**. *For focus groups*: Be aware that having a group discussion on Zoom requires us to use the available features if we want this to go smoothly. Please "raise your hand" using the Zoom feature if you have something to say.

4. **Round-table introduction of participants**:

- Please start by introducing yourself and your household.

Probes:
- What you (and your spouse?) do for a living?
- Size and composition of family
- Allergies, dietary and other food related imperatives?
- Briefly describe your lifestyle?

PART 1: Food in your life (15-20 minutes)

Although I know we said that we wanted you here to discuss food safety and related topics, we also know and want to spend some time understanding you as a group and the <u>*different*</u> *ways you think about food, buy your food, make your food and so on. Canadian consumers are pretty diverse in these respects – we have different ideas about what makes for "good food". We buy with very different ideas about food quality, cost, convenience and so on. So, let's start with this topic with a mind to uncovering the differences between you on this topic…* Let's just have someone start us off by giving us a high level summary of what "good food" is in your house – then I'll want to hear from each of the rest of you…

As the discussion unfolds, inventory food dimensions for follow up questions:

PROBES (if not brought up):

What is "good food" in your house? (Or, conversely, what qualifies as "bad food"?)

How much of what you consider "good food" is determined by:

- Price
- Provenance
- Seasonality
- Food group (protein, starches, sugars, etc)
- Your family's background
- Variety (prone to stay with what your family likes or try new things a lot?)
- Size and location of producers

- Dietary implications (calories, fat content, etc.)
- Taste
- Freshness
- Etc.

- Are you adventurous with food or tend to be more conservative?
- Do you care a lot about food or is it just something you take care of with minimum effort
- Is the cost of food a big deal or not?
- Do you read, think or worry about ingredients? What are you looking for?
- What would I learn from watching you buy food? Where do you go? What guides those choices? Etc.

Food Related Worries:

Ok, so what kind of things do you worry about as you're buying food? (Round table, probes)

- Any worries specific to the kind of food you're buying:
  - Meats
  - Vegetables
  - Dairy
  - Fish
  - Etc.
- Anything about how farming practices?
- What about dietary/health related worries?
- Anything about where (or what kind of company) food comes from?
- Antyhing else?

PART 2 - Food Safety Regulation: (15-20 minutes)

Let's talk about how food safety is assured in Canada. I want to make it clear right up front that I don't expect anyone to have detailed knowledge of this topic – this is more about the way you think about food safety and related regulations, and again, the different ways we might imagne this. Of course, we can also talk about what you know or have strong impressions about…. SO once again, can someone just paint the picture they have in their minds about how food is made safe in Canada? (Round table, probes as follows)

- **Responsible parties**: What organizations and at what level of government are responsible for ensuring that food is safe in Canada? How big/sizeable is this/ are these organizations? Probe for details and divergent opinions. Check for unaided CFIA awareness.
- **Presumed activities**: What do these organizations do? (Again, reassure that we're ok with impressions). How involved are they in the businesses they regulate? Generally-speaking, do you think enough is being done? Why? Why not? Let's think specifically about different kinds of food (probe for meats, fish, vegetables, etc.). Anything else?
- **Examples of Unsafe Food (incidents or otherwise):** What kinds of things signal "unsafe" food to you? How about those of you that worry about "X"? PROBE: food fraud instances. Fines levied against food related busineses? Contaminations? What else?

- What is a **food recall**? When do they happen? What do they mean about the safety of Canada's food supply? Is this a sign that the system is working or not working? What kind of dangers to Canadians' health do you associate with a recall?
- What kind of dangers to Canadians' health do you associate with a recall? How do you find out about food recalls? For example, through news media (TV, newspapers, radio)? Social media? Do you subscribe to the CFIA's food recall alerts?
- Has anyone heard about restrictions about seeds and borders or traveling overseas with pets?
- Is there a **difference between "safe food" and "unhealthy food"?** what about between "unsafe" and "poor quality"? Where do they interect? How has your thinking about this changed over time, if at all? Have you heard anything lately that caused you to reconsider any of this?

Understanding of CFIA Mandates

Does anyone have an idea about other food related activities and regulations that Government (Agency) might be accountable for? What might they be:

Probe, if not mentioned and discussed thoroughly:

- Monitoring the health of animals and plants imported to and exported from Canada
- Overseeing the transportation of animals
- Overseeing seed and breeding stock and the genetic health of plants and animals
- Artificial insemination of animals
- Oversight of fertilizer and pesticide use
- Invasive pests, parasites, etc.
- Transportation of pets across international border

- Etc.

WRAP UP

So by now I suppose it's clear that this research is being commissioned by the CFIA. What do you think we've learned about this agency, its reputation and the how reputation is being communicated?

PROBES along the following topics:

- **Specific Role**: What is it accountable for?
- **Comprehensiveness**: How wide and broad is its mandate?
- **Organization**: What do you understand of how the CFIA is structured and how it operates? How long has it been there? How big is it? Etc.
- **Credibility?**
- **Authorship:** How much it owns it's communications and how much of it seems colored by other sources?
- **Institutional priority topics and audiences**: As you recall all of the things we've discussed, what do you think the CFIA is focused on – either in terms of issues or audiences? What do we think about that?
- **Any additional topics, concerns or issues**?

Before we end this, allow me to remind you that this is Government research, and that you are entitled to both protection under the Privacy Act, and access to this research once the process has run its course. A report will be available under the Access to Information Act or from Library and Archives Canada. Most of all, please accept my thanks for your time and good will.

THANK AND TERMINATE

Business Screener

Patterson Langlois Consultants Recruiting Screener

Project: CFIA Compliance Messaging
Recruiting instrument for industry association and businesses
(11 IDI's*)*

2665 Sainte-Cunégonde, suite 201
Montréal (Qc.)
H3J 2X3
Tel.: (514)943-1645

Preliminary version
February 2023

Your business and the Canadian Food Inspection Agency

DATES/TIMES: Tentatively scheduled for March 7-10 (7-11 In-depth Interviews)

CLIENT: Government of Canada – CFIA regulatory compliance related communications
TOPIC: Industry experience with food regulations and the CFIA
INCENTIVE: $200
CITIES: National, by Internet Interface (Zoom)

RECRUITING BY EXECUTIVE RECRUITER
WITH PRE-SCREENED CANDIDATE

ELIGIBILITY CRITERIA FOR EACH BUSINESS/RECRUITEE (established in advance)

Musts:

The business is regulated by the CFIA ❑

The business adheres to the at least one of the following:
The business transforms plant or animal products into food ❑
The business grows plants or raises animals ❑
The business deals with pests, parasites, or fertilizers ❑
The business imports or exports outside of Canada ❑
The business deals with seed or breeding stocks ❑
The business has a primary function in animal or plant transport ❑

RECRUIT 1 for 1 to show each IDI

Hello/Bonjour:

My name is _______ and I work for Patterson, Langlois Consultants, a research company working on behalf of the Canadian Food Inspection Agency. The purpose of this call is to see if you would participate in some research with food businesses we are doing on behalf of the Canadian Food Inspection Agency. The purpose of this research is to evaluate CFIA communications about compliance with food safety regulations. Can you help me? I need to speak to the right person in your organization for this research. This would be the person in your shop that has the best understanding of the regulations you comply with and who can speak with knowledge and authority on the subject for your organization. Is that you? If not, can you direct me to that person?

LEAVE YOUR CONTACT INFO IF NECESSARY AND REPEAT INTRO AS NECESSARY FOR THE NEW PERSON ONCE CONTACT HAS BEEN ESTABLISHED. Please be mindful of the fact that you are in effect working on behalf of the government.

INDICATE: Male ☐1 Female ☐2 ➔ **A good mix**

REPEAT INTRODUCTION IF NECESSARY

Q.1 *I got your name (from _____) because you indicated that you were willing to be interviewed on this topic in a survey that you answered. Can I just verify: We are looking for someone in your organization that can speak with knowledge and authority about the regulations you are expected to follow and your organization's experience with the CFIA?*

Yes ❑1
No ❑2 ➔ ***Would it be possible to speak with that person?***
(Re-engage or set up a call-back)

Q.2 *Would you be willing to be interviewed on this topic and speak on behalf of your organization? These interviews will be conducted on Zoom during business hours and take roughly 90 minutes with up to 5 other colleagues in your industry from around the country (*if necessary, reassure*: You will not be asked anything of a confidential or competitive nature)*

Yes ❑1
No ❑2 ➔ THANK AND END

Q.3 *Can you tell me*: *How long has your company been in operation?*

Less than 1 year ☐1 **MAX 1 PER GROUP**
Between 2 and 5 years ☐2
5 years or longer ☐3 **GOOD MIX:**
Don't know / won't answer ☐9 **THANK AND TERMINATE.**

Q.4A *Roughly how many employees work for this organization?* (in normal times)

Less than 10 ❑1
Between 10 and 50 ❑2
Between 50-200 ❑3 **Not more than half**
Over 200 ❑4 **THANK AND TERMINATE**
DK/NA ❑9 **THANK AND TERMINATE**

Q4.B To your knowledge has your company ever experienced any of the following after an inspection by the CFIA:

Been required to take corrective actions in your operations or repairs to your facility ❑1
Been issued a written notice of violation with or without penalty ❑2
Been issued an administrative monetary penalty ❑3
None of the above ❑4 **THANK AND TERMINATE**
DK/NA ❑9 **THANK AND TERMINATE**

Q.5 *Have you ever participated in CFIA related research before?*

Yes ❑1 ➔ Determine topic and recency of participation in last 5 years. Exclude anyone who has done CFIA sponsored groups or who has attended three or more studies in the last 5 years, or within the last month.
No ❑2

Q.6 *The topic of discussion will be the communications that CFIA sends to you about regulations. This research is being done on behalf of the CFIA. There is no intention to sell you a product or to change your views about anything, but rather to gather opinions from the industry to help the CFIA perform its functions better. Participation is strictly on a voluntary basis and the information provided will be administered in strict accordance with the provisions of the Privacy Act. Because we recognize that this is going to take some of your valuable time, we will offer you $200 as compensation at the end fo the discussion. Could we count on you?*

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

Q.7 *Would you be available to talk to our research on _____ at ______?*

SKIP TO CONTACT DETAILS

Q.8 *Great! The interview will be on Zoom with a professional moderator from the research firm (Patterson, Langlois Consultants) whose role is to solicit your opinions.*

Determine that the person is comfortable with Zoom or is willing to use it.

The topic of discussion will be food regulations and the regulating agency. This research is being done on behalf of the CFIA. There is no intention to sell you a product or to change your views about anything, but rather to gather opinions from the industry to help the CFIA perform its functions better. Participation is strictly on a voluntary basis and the information provided will be administered in strict accordance with the provisions of the Privacy Act. To thank you for your participation, we will give you $200 compensation at the end of the interview. Could we count on you?

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

CONTACT DETAILS

The discussion will be held on Zoom. Are you comfortable with that?

The discussion will about (1 hour for In-depth interview) (90 minutes for the focus group). Please, be ready 15 minutes prior to the start of your interview. Most importantly, if for any reason you are unable to attend, please call or email us as soon as possible so that we can reschedule or replace you if need be. Although we can accommodate a replacement for you if that's necessary, please inform us beforehand because we cannot do this without screening that person first. PROVIDE NAME, PHONE NUMBER AND EMAIL.

Can I confirm your contact details so we can send you the Zoom link and a reminder?

Name: ____

EMAIL: ____

May I please have a phone number where I can reach you ?

House: (_____)-_____-__________ Work: (_____)-_____-__________

THANK YOU!

Your co-operation is greatly appreciated!

RECRUITED BY: ______________________ CONFIRMED BY: _______________________

Business Discussion Guide

REPUTATION POR:
DISCUSSION GUIDE

Focus Groups with Plant and Animal Business Company Personnel

SUMMARY

Dates: Commencing TBD
Client: Canadian Food Inspection Agency (CFIA)
Locations: National in-depth interviews and focus groups with Plant and Animal organization professionals on Zoom

In order to understand impressions and opinions about the CFIA, qualitative research is required with businesses in the Plant and Animal Business Line. Qualitative data will be collected through virtual focus groups recruited from the Reputation tracking survey.
Research Objectives:

- Gather background data on reputation, trust and other brand attributes that allows the Agency to manage and develop the CFIA brand over plant and animal business lines.
- Examine thoughts on CFIA messages, brand attributes and service quality
- Explore views on stakeholders' access to services and assessment of those services
- Explore factors contributing to different levels of satisfaction with existing communication tools and tactics
- Explore preferred methods of communication for each stakeholder segment

DISCUSSION GUIDE

Introduction (15 min.)

- **Introduction of moderator, name and type of research firm:** (i.e. John representing the marketing research firm Patterson Langlois)

  Subject for animal business line interviews/focus groups: As you are aware from the initial survey, we're here to talk about Canada's animal health regulations and the federal animal health regulator, the Canadian Food Inspection Agency (CFIA). The purpose of these discussions is to help the CFIA recognize how individual companies experience the regulations and how companies view the CFIA as a regulator. More specifically, your input from these discussions will assist future communications and messages the CFIA uses to deliver on its mandate. Your input is important and very much appreciated.

Subject for plant business line interviews/focus groups: As you are aware from the initial survey, we're here to talk about Canada's plant safety regulations and the federal plant safety regulator, the Canadian Food Inspection Agency (CFIA). The purpose of these discussions is to help the CFIA recognize how individual companies experience the regulations and how companies view the CFIA as a regulator. More specifically, your input from these discussions will assist future communications and messages the CFIA uses to deliver on its mandate. Your input is important and very much appreciated.

Explanation of the focus group process:

- **Conversation recorded:** This conversation will be recorded, and will be used in accordance with the Privacy Act and the Personal Information Protection and Electronics Documents Act.
- **Voluntary participation:** Participants are free to leave or refuse to participate at any time.
- **Anonymity:** Although we mean to listen to and use your opinions here, you have a strict guarantee of anonymity. The fact that you participated in this process or what you personally say will not be made public.
- **Disclaimer of observers:** Observers may be on this call and hidden from view. Their presence is to directly hear what you have to say but mostly to ensure that I ask the right questions, cover all of the bases, etc.
- **Role of moderator and participants:** I am here as a professional researcher. I am not a Government employee and I am here precisely because I am neutral and objective. I have no vested interest in how you respond to my questions. I am here to ask questions, not provide answers. You are here to speak for yourselves and your organization.
- **Role of moderator continued:** Although I have done my homework and read up on regulations, I am no expert – please bear with me if I ask naïve questions or ask that you explain things that may seem obvious to you.
- **Expression of opinions:** There are no wrong or right answers, and no expectation that you agree.
- **Length:** We will be here about 90 minutes – more if you think it necessary. (60 minutes for in-depth with representatives of industry associations).

- **Assess familiarity with Zoom.**

- **Round-table introduction of participants:**
  - Please start by introducing yourself. Tell us a little about yourself. Then, tell us a bit about your current work and the industry that you're working in.

Probes:

- How would you describe the current state of your industry as a whole?
- How has this impacted your business specifically?
- Do you see it changing within the following year? Why?

PART 1: Discussion on Regulations (15 Minutes)

Let's first talk about regulations for businesses in your industry.

- Do you believe food, plant and/or animal regulations have had any effects on businesses in your industry? If so, could you mention them?
- Would you say that these effects have been beneficial or detrimental? [*Probe for why*]
- Could you think of any challenges your business has faced with current regulations? [*Probe for why or why not*]
- In general, do you trust that the government --- specifically, federal regulatory agencies --- will do the right thing towards businesses in your industry?

PART 2: Awareness and Views Towards the CFIA as a Regulator (approx. 30 minutes)

Opinions on the CFIA and its service

So, let's talk about your thoughts on the CFIA.

- What do you think of their organization as a whole? [*Probe for more detail on their assumptions*]
- What were your impressions of the CFIA representatives you've come across in the past?

- Would you say that they were polite, professional and/or helpful? [*Probe for what they thought their strengths/weaknesses were*.]
- What do you feel about what you hear/see about the CFIA in the media?
- In your opinion, what can the CFIA do to improve their service?
- How much interaction have you had with the CFIA in the past?
- How would you describe your previous interactions with the CFIA? [*Probe for why*.]
- Did you speak with a CFIA representative in person, or through the phone, or online?
- Do you believe that the CFIA is a trustworthy regulator? *[Probe for what makes them think, e.g., attributes, that the CFIA is trustworthy or untrustworthy.*]
- Do you think they do the right thing for Canadian businesses? [*Probe for why*.]
- Are they efficient in balancing the needs of Canadians and those in your industry? *[Probe for why*.]
- Are they efficient in fixing problems they try to address? Or, do you see them creating hurdles/burdens/competitive disadvantages for businesses in your industry? [*Probe for why.*]
- Do you think that they are consistent in providing the best service for you? [*Probe for why*.]
- Do they provide you clear guidance on regulations? [*Probe for more detail*.]
- Do you trust their spokespersons or subject matter experts? For example, in meetings, technical briefings, media quotes, etc. [*Probe for why.*]
- What do you think of their responses to evolutions in your industry and/or the economy itself? Do you think they were fast in this? [*Probe for why*.]

Getting Information from the CFIA

Now, let’s talk about how you usually get your information from the CFIA.

- In the past, how did you access CFIA services and/or access information from the CFIA, e.g., information on food, animal and/or plant regulations? Was it mostly in person or digitally (i.e., through the CFIA website)?

- o Have you ever been subscribed to and read CFIA's listservs, email lists, social media posts? [*Probe for reasons they have or have not*.]

- o Let's say that one day you are planning to apply for a permit or a license. Ideally, would you consider doing so in person or online? [*Probe for why*.]

- o Have you ever used services, such as the My CFIA portal, in the past? If yes, what your experience with it? [*Probe for why did they felt this way about it*.]

- o If you had the ability to include any feature or service on the My CFIA portal, which one would it be? [*Probe for their reasons*.]

- o If there was a newsletter to businesses, what would it look like? What topics would you hope it covered? [Probe for if they would read it, why or why not]

Re-state the list of regulatory challenges not mentioned previously: Ok, these are the regulatory topics you brought up earlier. Let's talk about these. If you think of anything else along the way, this would be the time to bring it up.

Explore each topic:

- In what other ways does it affect your business?
- What were its impacts on costs, competitiveness, ability to export or sell between provinces, human resources, etc.?
- How has this changed over the last years, if at all? (**query re: above** → changes in commerce, competitive challenges, nature of opportunities, etc.)
- Do you feel these things are stable, changing still? How do you think it might change 5 years from now?

PART 3: Communications (15 Minutes)

Let's now talk about your experience with any communications you have had with the CFIA.

- Could you tell us about your recent communications have you had with them?

[*Round table, probes*]

- o Do you usually have a preferred way of getting in touch with them? Why?

- o Would you say that they were fast in getting back to you for any questions or concerns you had in the past? [*Probe for more detail*.]

- o What were the effective way in which the CFIA has sent messages to you? [*Probe for reasons*.]

- Do you think that they are usually effective in communicating and/or providing information on food, animal or plant regulations? [*Probe for why*.]
- Do you have any concerns about communicating with the CFIA? If yes, what are they? [*Probe for why*.]
- If you could change something about how the CFIA communicates, what would it be? [*Probe for why*.]
- In your view, what types of communication as the most effective in breaking through the clutter? [*Probe for why*.]

Inspect and Protect podcast series

So, the CFIA actually has a podcast series called "Inspect and Protect," where they talk about things such as food safety, animal health and plant protection. Have you heard of it before?

- [*If respondent answers no*] Would you be interested in listening to it?
- What were your impressions of it?
- What type of content would you like to see included in it?
- In your view, what are the most important features for a podcast like "Inspect and Protect"? [*Probe for the following, if not mentioned*]
    - Length.
    - Topics
    - Background music
    - Sound effects
    - Invited guests
- What type of content do you believe would make others in your industry more engaged?

ADDITIONAL TOPICS TO BE PROBED IF NOT MENTIONED

- Introduction of any new policy, programs, legislation or updates to the regulations they must follow (E.g. Fertilizer regulations or Animal Transport).
- Follow up for both businesses lines:
    - **Characterization:** What kind of change did this represent?
    - **Comprehensiveness:** Is it adapted to the realities faced by your specific line of business? If not, how so?
    - **Overall impact and unexpected or unforeseen consequences:** What did you expect from this change in legislation/regulations? Did it deliver positive or negative results? How so and how not? Did anything get unexpectedly worse or

better after the introduction of the legislation related to plant or animal health? Please explain?

- Was the regulation adjustment easier or harder than you anticipated? Why?
- Are you satisfied or not with the way these regulations were introduced? Why? Why not?
- In the end, has this proved to be more or less of an improvement than you thought?
- Did you have the chance to be heard in the process or were you at least aware of the comments other members in your industry had on the new policies/regulations?

Before we end this, allow me to remind you that this is government research, and that you are entitled to both protection under the Privacy Act, and access to this research once the process has run its course. A report will be available under the Access to Information Act or from Library and Archives Canada. Most of all, please accept my thanks for your time and good will.

Quantitative Instruments

Consumer Questionnaire

Introductory text:

To take survey in French

The objective of this research is to help the Government of Canada understand the perceptions that Canadians have regarding the safety of food and the protection of plant and animal health in Canada.

This is entirely voluntary, and your responses will remain confidential and anonymous. There is no attempt here to sell or market anything. It will take approximately 10 minutes of your time to complete.

Would you like to participate in our survey?

Contact us for an alternative method to take the survey.

To verify the legitimacy of this survey you can contact Pollara Strategic Insights (mailto: https://www.pollara.com/privacy/) or the Canadian Food Inspection Agency (CFIA) at CFIA.information.ACIA@canada.ca

ASK ALL

S1: In what year were you born?

[DROP DOWN BOX 1900-2021] → IF 2005-2023, TERMINATE

99. Prefer not to answer

IF RESPONDENT SELECTS "PREFER NOT TO ANSWER" AT S1, ASK S1A:

S1A**:** Would you be willing to indicate in which of the following age categories you belong?

1. Younger than 18 years old TERMINATE
2. 18 to 24
3. 25 to 34
4. 35 to 44
5. 45 to 54
6. 55 to 64
7. 65 or older
8. Prefer not to answer TERMINATE

S2: In which province or territory do you live?

1. British Columbia
2. Alberta
3. Saskatchewan
4. Manitoba
5. Ontario
6. Quebec
7. New Brunswick
8. Prince Edward Island
9. Nova Scotia
10. Newfoundland and Labrador
11. Yukon
12. Northwest Territories
13. Nunavut
14. Outside Canada → **TERMINATE**
15. Prefer not to answer → **TERMINATE**

ASK ALL

S2A**:** Please indicate your gender.

1. Male
2. Female
3. Other
4. Prefer not to answer

ASK ALL

S3. Does anyone in your household have any food allergies or sensitivities? If so, please indicate the severity of these allergies/sensitivities.

1. Yes, myself [Ask S3A]
2. Yes, somebody in my household [Ask S3A]
3. No
4. DK

ASK S3A ask if either code 1 or 2 at S3

S3A You said that you or somebody in your household has one or more food allergy or sensitivity. Please indicate the type and severity of any applicable food allergies or sensitivities in your household.

COLUMNS

- **Show 7-point scale**
- **Anchor "Not sensitive or allergic at all" over 1**
- **Anchor "Very sensitive or very allergic" over 7**

ROWS (RANDOMIZE)

1. Milk
2. Eggs
3. Tree nuts
4. Peanuts
5. Shellfish
6. Fin Fish
7. Soy
8. Wheat
9. Sesame
10. Caffeine
11. Sulfites

12. Salicylates
13. Amines
14. Mustard

ASK S3B IF S3=CODE 1 OR 2 AT S3

S3B What other food allergies/sensitivities do you or somebody in your household have?

____

____

____

____

____

There are no other food allergies / sensitivities in my household ☐

MAIN SURVEY

SECTION A – CFIA KEY PERFORMANCE INDICATORS

ASK ALL – DO NOT SHOW HEADERS Rotate start

UNAIDED AWARENESS

A0F: When you think of organizations in Canada that are dedicated to **food safety**, which organizations come to mind?

Please type one organization per box for as many organizations as you can think of.

None come to mind ☐

PROVIDE 5 BOXES. RECORD THE ORDER THAT THE BRANDS ARE MENTIONED.

UNAIDED AWARENESS

A0A: When you think of organizations in Canada that are dedicated to safeguarding **animal health and protecting against animal diseases,** which organizations come to mind?

Please type one organization per box for as many organizations as you can think of.

None come to mind ☐

PROVIDE 5 BOXES. RECORD THE ORDER THAT THE BRANDS ARE MENTIONED.

UNAIDED AWARENESS

A0P: When you think of organizations in Canada that are dedicated to safeguarding and protecting **plant health**, which organizations come to mind?

Please type one organization per box for as many organizations as you can think of.

PROVIDE 5 BOXES. RECORD THE ORDER THAT THE BRANDS ARE MENTIONED.

None come to mind ☐

AIDED AWARENESS

A1[M]: When thinking of organizations that are responsible for **safeguarding the nation's supply of food, animals, and plants**, which of the following have you heard of before today?

RANDOMIZE

1. The Canadian Food Inspection Agency (CFIA)
2. Municipal inspectors (for example, public health inspectors)
3. Provincial food safety regulators (Provincial or Territorial governments)
4. Health Canada
5. Agriculture and Agri-Food Canada
6. Public Health Agency of Canada
7. Businesses

None of the above ⎕ **ANCHOR**

FAMILIARITY WITH THE CFIA

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. Reducing risks to food safety, plant health and animal health are CFIA priorities, and the health and safety of Canadians are key forces behind the design and development of CFIA programs.

ASK ALL

A2: How familiar would you say you are with the activities of the Canadian Food Inspection Agency (CFIA)?

Please use the 7-point scale below for your response. A rating of 7 indicates 'very familiar'. A rating of 1 indicates 'not familiar at all'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Not familiar at all" over 1**
- **Anchor "Very familiar" over 7**

ASK ALL

A3: Where have you seen, heard, or read about the CFIA? Select all that apply

1. Word of mouth (friends, family, etc.)
2. Social media (not including CFIA social media)
3. Podcasts
4. A digital assistant (for example, Alexa, Siri, Google)
5. Traditional media (newspapers, TV, radio)
6. Internet (includes online news sites but not social media)
7. Direct contact from the CFIA (includes CFIA social media and visiting the CFIA website)

99 Not applicable: have not seen, heard, or read anything about the CFIA

SELECTING 99 SHOULD UNSELECT ALL OTHER RESPONSES [skip A3a]

A3a. Select all the following that apply to you:

1. I subscribe to CFIA food recall notices
2. I submitted a food safety or labelling concern
3. I follow the CFIA on a social media platform
4. I have visited the CFIA website
5. I have contacted the CFIA by phone
6. I have contacted the CFIA by email or through the website
7. I subscribe to the CFIA's Inspect and Protect newsletter
8. I have read articles, watched videos, or listened to podcasts from CFIA's Inspect and Protect
9. In person interaction with a CFIA employee
10. I have a friend or family member who works at the CFIA

If A3a is selected, ask A3A1-A3A8.

- **Show 11-point scale (0-10)**
- **Anchor "Not at all satisfied" over 0**
- **Anchor "Very satisfied" over 10**

ASK IF CODE 1 at A3a

A3A1: How satisfied are you that the CFIA issues food recall notices in a timely manner? Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

ASK IF CODE 2 at A3a

A3A2: How satisfied are you with the CFIA handling of the food safety or labelling concern you reported? Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

ASK IF CODE 3 at A3a

A3A3: How satisfied are you with the CFIA content on social media? Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

ASK IF CODE 4 at A3a

A3A4: How satisfied are you with the usability of the CFIA website? Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

ASK IF CODE 5 at A3a

A3A5: How satisfied are you with the CFIA phone interaction you had? Use a scale of 0-10 where 0 is “not at all satisfied” and 10 is “very satisfied”.

ASK IF CODE 6 at A3a

A3A6: How satisfied are you with the CFIA email or website interaction you had? Use a scale of 0-10 where 0 is “not at all satisfied” and 10 is “very satisfied”.

ASK IF CODE 8 at A3a

A3A7: How satisfied are you with the articles, videos, or podcasts from CFIA’S Inspect and Protect? Use a scale of 0-10 where 0 is “not at all satisfied” and 10 is “very satisfied”.

ASK IF CODE 7 at A3a

A3A8: How satisfied are you with the Inspect and Protect monthly newsletter? Use a scale of 0-10 where 0 is “not at all satisfied” and 10 is “very satisfied”.

ASK A4 IF A3 = ANY EXCEPT 99. IF A3 = 99, SKIP TO AX

A4: Thinking about what you have seen, read, or heard about the Canadian Food Inspection Agency, indicate how well you understood the information.

Please use the 7-point scale below for your response. A rating of 7 indicates ‘understood completely. A rating of 1 indicates ‘not at all’.

COLUMNS

- **Show 7-point scale**
- **Anchor “Not at all” over 1**
- **Anchor “Understand completely” over 7**

ROWS

SHOW SELECTIONS FROM A3

ASK ALL

AX: When you review the following list of government and non-government organizations, how *favourable* of an impression do you have overall of each organization?

COLUMNS:

- **Show 7-point scale**
- **Anchor “Not favourable at all” over 1**
- **Anchor “Extremely favourable” over 7**
- **Add “I don’t know / Not sure”**

ROWS (RANDOMIZE)

1. Canadian Food Inspection Agency
2. Health Canada
3. Canada Revenue Agency
4. Canada Border Services Agency
5. Canadian Transportation Agency
6. Public Health Agency of Canada
7. Canada Department of Fisheries and Oceans

ASK ALL - TRUST

A5: Please indicate how much you trust the Canadian Food Inspection Agency (CFIA) to do what is right to help ensure that food is safe in Canada?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘trust completely’. A rating of 1 indicates ‘not at all’.

COLUMNS

- **Show 7-point scale**
- **Anchor “Do not trust at all” over 1**
- **Anchor “Trust completely” over 7**

ASK ALL

A6: How much do you trust the Canadian Food Inspection Agency (CFIA) to inspect that food product labels have indications regarding ingredients that may cause allergy/food sensitivity?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘trust completely’. A rating of 1 indicates ‘not at all’.

COLUMNS

- **Show 7-point scale**
- **Anchor “Do not trust at all” over 1**

- **Anchor "Trust completely" over 7**

ASK ALL

A7: Please rate your level of confidence that food sold in Canada is safe.-

Please use the 7-point scale below for your response. A rating of 7 indicates 'very confident'. A rating of 1 indicates 'not at all confident'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Not at all confident" over 1**
- **Anchor "Very confident" over 7**

ASK ALL

A7a**:** When it comes to verifying that food sold in Canada is safe, how well to you believe the Canadian Food Inspection Agency is doing?

A7b: When it comes to safeguarding plant health (regulating invasive insects, plants, and other plant pests), how well do you believe the Canadian Food Inspection Agency is doing?

A7c: When it comes to safeguarding animal health and preventing the spread of animal diseases, how well do you believe the Canadian Food Inspection Agency is doing?

Please use the 7-point scale below for your response. A rating of 7 indicates 'doing well'. A rating of 1 indicates 'not doing well'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Not doing well" over 1**
- **Anchor "Doing well" over 7**

CFIA BRAND ATTRIBUTES ASSESSMENT (DO NOT SHOW HEADER)

A8. Below are a number of statements about the CFIA. For each statement, please indicate how much you agree or disagree. A rating of 7 means 'Agree completely'. A rating of 1 means 'Disagree completely'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Disagree completely" over 1**
- **Anchor "Agree completely" over 7**
- **Add "Not sure/Not applicable"**

RANDOMIZE

1. The CFIA looks out for the best interests of Canadians
2. The CFIA is effective in enforcing food safety regulations
3. All businesses are treated fairly by the CFIA
4. Food recalls are an example of the food system working
5. I understand what the CFIA does
6. Getting more information about food, plant or animal safety from the CFIA is easy
7. CFIA veterinarians are among the best in their field

SECTION B – CFIA MESSAGE EVALUATION

ASK ALL

B1: Below are some statements to describe the activities of the Canadian Food Inspection Agency (CFIA). How much do you agree or disagree with each of the following statements?

COLUMNS

- **Show 7-point scale**
- **Anchor "Disagree completely" over 1**
- **Anchor "Agree completely" over 7**

ROWS - RANDOMIZE

1. By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy
2. As a science-based regulator, the CFIA is believable when it issues a statement

3. The CFIA issues food recall warnings in a timely manner
4. The CFIA enforces regulations that help ensure animals are transported humanely
5. The CFIA enforces regulations that help ensure Canada's plant resources are protected
6. CFIA enforcement activities are strong enough to encourage companies to comply with the regulations
7. CFIA helps to facilitate international trade

B1A. Please rank what you personally believe the priorities of the CFIA should be in order of most important to least important

- Verifying safe food is sold to consumers
- Verifying importers do not import contaminated or fraudulent foods
- Helping to keep international markets open to Canadian food, plant, and animal products
- Helping to keep foreign animal diseases out of Canada
- Helping prevent the spread of plant pests and animal diseases in Canada
- Verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada
- Helping prevent plant pests and invasive species from entering Canada

B2. Were you aware that moving untreated firewood from a campground or a cottage can spread invasive species?

1. Yes
2. No

B3. Were you aware (before this survey) that the CFIA was responsible for regulating the importation of dogs into Canada?

1. Yes
2. No

B4. Were you aware that the CFIA plays an important role in preventing the spread of pests such as Japanese beetle in Vancouver and emerald ash borer in eastern Canada?

1. Yes
2. No

B5. Please look at the following list of words, and select the ones that in your view, describe the CFIA

(PLEASE SELECT ALL THAT APPLY)

RANDOMIZE

Efficient

Transparent

Innovative

Informative

Scientific

Fair

Dedicated

Consistent

Trusted

Responsive

Respectful

Punitive

Caring

Global Leader

Service oriented

NONE OF THE ABOVE

Scenario questions / Awareness of CFIA activities

B6. From the following list, indicate which of the following situations you believe the CFIA is involved in?

[Randomize list]

1. Checking food products being imported into the country
2. A restaurant has a complaint of a dirty kitchen
3. A person gets food poisoning from cooking and eating undercooked meat
4. Checking plant products coming into the country
5. Insects, fungus and other pests that affect plant health, but do not have a direct impact on the ability of consumers to eat the plant as food
6. A dog being brought into Canada by a vacationing family
7. A dog being brought into Canada to be permanently adopted by a person living in Canada
8. Live animals being exported from Canada to other countries for reasons other than to be consumed as food
9. Live animals being exported from Canada to other countries to be consumed as food

Lifestyle / Activities

C1. Which of the following statements best describes your role and responsibility when it comes to grocery shopping for your family or household?

1. I am solely responsible
2. I share in this responsibility
3. Somebody else in my family or household looks after grocery shopping
4. Prefer not to say

C2. Which of the following descriptions would you say describe you at least somewhat?

COLUMNS

- **Show 4 columns: "Does not describe me at all", "Describes me somewhat", "Describes me completely", and "Don't know/Not sure"**

RANDOMIZE

Foodie

Camper

Cottager

Hobby farmer

Gardener

Nature enthusiast

Hiker

Outdoorsy

Pet owner

Animal lover

DEMOGRAPHICS

The following information is collected for classification purposes only.

ASK ALL

X2: What is the highest level of formal education that you have completed?

1. Less than a high school diploma or equivalent
2. High school diploma or equivalent
3. Registered apprenticeship or other trades certificate or diploma
4. College, CEGEP or other non-university certificate or diploma
5. University certificate or diploma below bachelor's level
6. Bachelor's degree
7. Graduate degree above bachelor's level
8. Prefer not to answer

ASK ALL

X3: What language do you speak most often at home? Select all that apply

1. English
2. French
3. Other (Specify) ____________________
4. Prefer not to answer

ASK ALL

X4: Which of the following best describes your total household income last year, before taxes, from all sources for all household members?

1. Under $20,000
2. $20,000 to just under $40,000
3. $40,000 to just under $60,000

4. $60,000 to just under $80,000
5. $80,000 to just under $100,000
6. $100,000 to just under $150,000
7. $150,000 and above
8. Prefer not to answer

ASK ALL

X5. Are you an Indigenous person?

An Indigenous person is a member of a First Nation, a Métis, or an Inuk (Inuit). First Nations (North American Indians) include Status and Non-Status Indians.

1. Yes (Go to next question)
2. No (Go to X7)

IF X5 = 1, ASK X6. IF X5 = 2, SKIP TO X7

X6. You indicated that you are an Indigenous person. If you wish to provide further details, please specify the group to which you belong.

1. First Nations (North American Indian)
2. Métis
3. Inuk (Inuit)
4. Other (Specify) ______

ASK ALL

X7. Are you a member of a visible minority group?

A member of a visible minority in Canada may be defined as someone (other than an Aboriginal person) who is non-white in colour or race, regardless of place of birth. For example: Black, Chinese, Filipino, Japanese, Korean, South Asian or East Indian, Southeast Asian, non-white West Asian, North African or Arab, non-white Latin American, person of mixed origin (with one parent in one of the visible minority groups in this list), or other visible minority group.

1.Yes

2.No

IF X7 = 1, ASK X8. IF X7 = 2, SKIP TO X9

X8. You indicated that you are a member of a visible minority group. If you wish to provide further details, please select the box(es) that apply to you. (Mark all that apply.)

1.Black

2.Chinese

3.Filipino

4.Japanese

5.Korean

6.South Asian/East Indian (including: Indian from India; Bangladeshi; Pakistani; East Indian from Guyana, Trinidad, East Africa; etc.)

7.Southeast Asian (including: Burmese; Cambodian; Laotian; Thai; Vietnamese; etc.)

8.Non-White West Asian, North African, or Arab (including: Egyptian; Libyan; Lebanese; Iranian; etc.)

9.Non-White Latin American (including: indigenous persons from Central and South America, etc.)

10.Person of mixed origin (with one parent in one of the visible minority groups)

11.Other visible minority group (specify)

ASK ALL

X9: Please enter the first three digits of your postal code?

[Code as rural and urban]

[ALLOW 3 DIGITS FOR ENTRY]

99. Prefer not to answer

Business Questionnaire

INTRODUCTION
Thank you for taking the time to participate in this survey. The objective of this research is to allow you, a CFIA regulated party, to tell us how you see the Agency and to share what you think about the CFIA and its services. This survey will help the Agency to improve its program delivery and communication with businesses. It is also voluntary, and responses will remain confidential and anonymous. There will be no attempt to market or sell anything. It will take approximately 15 minutes of your time 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,** and you will be able to continue the survey in the same spot where you left off.

Contact us for an alternative method to take the survey.

To verify the legitimacy of this survey you can contact Pollara Strategic Insights (mailto: https://www.pollara.com/privacy/or the Canadian Food Inspection Agency (CFIA) at CFIA.information.ACIA@canada.ca

Customer NAICS code should assign the respondent into one of these 3 groups. Please only show the responses for the respective business line (i.e. food/plant/animal)]

S3 What industry segments does your company operate in?

Select all that apply

SHOW **ANSWERS 1 to 9** IF SAMPLE NAICS FOOD BUSINESS
Food businesses

1. Food preparation
2. Food importing
3. Food exporting
4. Interprovincial trade of food
5. Food manufacturing
6. Farming
7. Food/beverage manufacturing or processing
8. Meat and poultry slaughter
9. Other (specify) ____

SHOW **ANSWERS 10 to 26** IF SAMPLE NAICS ANIMAL BUSINESS

Animal health businesses:

10. Live animal importing
11. Live animal exporting
12. Germplasm (genetic material) import
13. Germplasm (genetic material) export
14. Animal product or by-product importing
15. Animal product or by-product exporting
16. Live animal domestic management (for example, producers, assembly yards, includes terrestrial and aquatic)
17. Animal product or by-product preparation or manufacture (including renderers and skin tanners)
18. Animal feed (including feed mills and feed sellers)
19. Pet food import
20. Pet food export
21. Animal transportation (including freight forwarders)
22. Artificial insemination centres
23. Veterinary biologics
24. Horse owners
25. Small flock owners (including bird collections)
26. Other (specify) ____

SHOW **ANSWERS 27 to 37** IF SAMPLE NAICS PLANT HEALTH BUSINESS

Plant health businesses:

27. Fertilizers and supplements
28. Forestry products
29. Horticulture (greenhouse, nursery, bulbs, fruit trees, grapevines)
30. Crops (grains, oilseeds)
31. Potatoes
32. Seed growing (other than seed potato)
33. Seed establishments/ handling
34. Plant breeding
35. Plant breeders' rights (intellectual property)
36. Invasive species prevention and management
37. Other (specify) ____

S4 Does your business sell products online?

Yes
No
Not sure

IF S4 = YES, ASK S4A & S4B, OR ELSE SKIP TO A0

S4A Approximately what percentage of your business' total revenue comes from online sales?

ADD NUMERIC ENTRY FIELD, ALLOW 3 DIGITS. ACCEPT ONLY WHOLE NUMERIC VALUES BETWEEN 0 AND 100, ADD "%" SIGN TO THE RIGHT OF ENTRY BOX.

__________________%

S4B Does your business have its own e-commerce site, or does it use other platforms (for example, Amazon)?

Own site
Another platform
Both
Don't not know / not sure

Page SecA – ASK ALL IN THIS SECTION

A0

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. How likely would you be to recommend the agency to similar businesses as yours?

❍ 10 10 Very likely

❍ 9 9

❍ 8 8

❍ 7 7

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1

❍ 0 0 Not at all likely

A1
How familiar would you say <u>your company</u> is with the activities of the Canadian Food Inspection Agency (CFIA)?

Please use the 7-point scale below for your response. A rating of 7 indicates 'Very familiar." A rating of 1 indicates "Not familiar at all".

❍ 7 7 Very familiar

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1 Not familiar at all

A2

When you review the following list of government and non-government organizations, overall, how *favourable* of an impression do you have of each organization?

COLUMNS:

- **Show 7-point scale**
- **Anchor "Not favourable at all" over 1**
- **Anchor "Extremely favourable" over 7]**

ROWS (RANDOMIZE)

1. Canadian Food Inspection Agency
2. Health Canada
3. Canada Revenue Agency
4. Canada Border Services Agency
5. Canadian Transportation Agency
6. Public Health Agency of Canada
7. Canada Department of Fisheries and Oceans

A3

Please indicate how much your company trusts the Canadian Food Inspection Agency (CFIA) to do what is right?

Please use the 7-point scale below for your response. A rating of 7 indicates 'trust completely'. A rating of 1 indicates 'do not trust at all'.

❍ 7 7 Trust completely

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1 Do not trust at all

A4

Please rate <u>your company's</u> level of confidence that **food sold in Canada is safe**.

Please provide your opinion even if you are not primarily a food business.

- ❍ 7 7 Very confident
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not confident at all

A5

Please rate your company's level of confidence that **food, plants, and animals in Canada are safeguarded**.

- ❍ 7 7 Very confident
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not confident at all

A6

When it comes to safeguarding the **safety of food** sold in Canada, how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily a food company.

- ❍ 7 7 Doing well
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not doing well

A7

When it comes to safeguarding the **health of plants** in Canada how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily a plant company.

❍ 7 7 Doing well

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1 Not doing well

A8

When comes to safeguarding the **health of animals** in Canada how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily an animal company.

- ❍ 7 — 7 Doing well
- ❍ 6 — 6
- ❍ 5 — 5
- ❍ 4 — 4
- ❍ 3 — 3
- ❍ 2 — 2
- ❍ 1 — 1 Not doing well

A9

Below are several statements about the CFIA.

For each statement, please indicate your level of agreement on a 7-point scale where, a rating of 7 means "strongly agree", 1 means "strongly disagree", and 4 means "neither agree nor disagree".

- ❍ 7 — 7 Strongly agree
- ❍ 6 — 6
- ❍ 5 — 5
- ❍ 4 — 4 Neither agree nor disagree
- ❍ 3 — 3
- ❍ 2 — 2
- ❍ 1 — 1 Strongly disagree

❍ 99 99 I don’t know/Not applicable

RANDOMIZE ROWS

1. The decision-makers in my company feel that CFIA regulations are very complicated.
2. The CFIA is transparent in how they operate.
3. The CFIA does business in the same way for everyone within their mandate.
4. CFIA regulations have been implemented in a way that is fair to all businesses.
5. CFIA guidance on regulations is clear.
6. CFIA regulations are too basic for my company to be concerned about.
7. Representatives of the CFIA are helpful when providing information on regulations.
8. Information received from the CFIA helps to stop future non-compliance.
9. Representatives of the CFIA are respectful in carrying out their duties.
10. Overall, the CFIA is a fair regulatory agency.
11. The CFIA is properly equipped to manage the complexity of Canada’s food, animal, and plant supply chain.
12. The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs.
13. The CFIA listens to industry views when it comes to understanding industry’s specific regulatory priorities.

14.	It is easy to have open and honest dialogue with the CFIA about regulatory priorities.
15.	The CFIA provides better service compared to food inspection agencies in other developed countries.
16.	The CFIA is sensitive to the reality of how things work in your specific industry.

A10.

Consider your interactions with the CFIA and its leadership structure. Select the responses that you feel describe each:

COLUMNS **(RANDOMIZE ORDER)**

1. Is credible
2. Is responsive
3. Is reliable
4. Don't Know / Not sure **(ANCHOR AT END; EXCLUSIVE)**

ROWS **(RANDOMIZE)**

1. CFIA senior management
2. CFIA inspectors/enforcement staff
3. Call centre staff

Page SecB – ASK ALL IN THIS SECTION

B1

Below are some statements to describe the activities of the Canadian Food Inspection Agency (CFIA). How much do you agree or disagree with each of the following statements?
RANDOMIZE

1.	The CFIA is contributing to the health and well-being of Canadians, the environment, and the economy by protecting Canada's food, animals, and plants.

2. As a science-based regulator, the CFIA is believable when it issues a statement.
3. The CFIA issues food recall warnings in a timely manner.
4. The CFIA enforces regulations that help to ensure that animals are transported humanely.
5. The CFIA enforces regulations that help to ensure that Canada's plant resources are protected.
6. CFIA enforcement activities encourage companies to comply with the regulations.

❍ 7 7 Strongly agree

❍ 6 6

❍ 5 5

❍ 4 4 Neither agree nor disagree

❍ 3 3

❍ 2 2

❍ 1 1 Strongly disagree

B2

In your opinion, how transparent do you think the CFIA is when it comes to assessing non-compliance with regulations? Please answer on a scale of 1-7 with 1 being not at all transparent, and 7 being very transparent.

❍ 7 7 Very transparent

❍ 6 6

❍ 5 5

❍ 4 4

- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not at all transparent

B3

How transparent do you think the CFIA is when it comes to reporting (publishing) non-compliance? Please answer on a scale of 1-7 with 1 being not at all transparent, and 7 being very transparent.

- ❍ 7 7 Very transparent
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not at all transparent

B4

How has <u>your company</u> received information from the CFIA in the past year?

Select all that apply

- ❑ 1 Mailed documents
- ❑ 2 Telephone communications
- ❑ 3 Email (including CFIA Listservs)
- ❑ 4 Portal notices in My CFIA
- ❑ 5 Personal interaction with a CFIA representative

- ❑ 6 CFIA website
- ❑ 7 Social media
- ❑ 8 Podcasts
- ❑ 9 CFIA’s Inspect and Protect newsletter
- ❑ 10 Through an industry association
- ❑ 11 Other (specify): ____
- ❑ 99 Not applicable: I have never received or do not remember receiving information from the CFIA *[Exclusive - deselect other options]*

B4A. *Show if B4 answered (i.e., does not select code 99 at B4)*
Do you feel the frequency of communication from the CFIA is…

- ❍ 7 7 Much too frequent
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4 Just right
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Much too infrequent

B5 *Show if B4 answered (i.e., does not select code 99 at B4)*
Please rate how well your company understands the information when it is received from the Canadian Food Inspection Agency (CFIA)?

Please use the 7-point scale below for your response. A rating of 7 indicates 'understands completely'. A rating of 1 indicates 'no understanding at all'.

1. Mailed documents *(Show if B4 1 Mailed document)*
2. Telephone communications *(Show if B4 2 Telephone)*
3. Email (including CFIA Listservs) *(Show if B4 3 Email)*
4. Portal notices in My CFIA *(Show if B4 4 Portal notices)*
5. Personal interaction with CFIA representative *(Show if B4 5 Personal interaction)*
6. CFIA website *(Show if B4 6 CFIA website)*
7. Social media *(Show if B4 8 Social media)*
8. Podcasts *(Show if B4 8 Podcasts)*
9. CFIA's Inspect and Protect newsletter *(Show if B4 9 I and P newsletter)*
10. Through an industry association *(Show if B4 10 Industry Association)*
11. <<B4.specify(11)>> ____ *(Show if B4 11 Other Specify)*

❍ 7 7 Understands completely

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1 No understanding at all

B6 *Show if B4 answered (i.e., does not select code 99 at B4)*
What is your overall level of satisfaction regarding the communication tools that are used by the CFIA? Note the scale is now 0 is not at all satisfied and 10 is very satisfied.

Please use the 10-point scale below for your response. A rating of 10 indicates 'very satisfied'. A rating of 0 indicates 'not at all satisfied''.

❍ 10 10 Very satisfied

❍ 9 9

❍ 8 8

❍ 7 7

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1

❍ 0 0 Not at all satisfied

B7 *Show if B4 answered (i.e., does not select code 99 at B4)*
How satisfied are you with the following communication tools used by the CFIA?

Please use the 10-point scale below for your response. A rating of 10 indicates 'very satisfied'. A rating of 0 indicates 'not at all satisfied''.

1. Mailed documents *(Show if B4 1 Mailed document)*
2. Telephone communications *(Show if B4 2 Telephone)*
3. Email (including CFIA Listservs) *(Show if B4 3 Email)*
4. Portal notices in My CFIA *(Show if B4 4 Portal notices)*
5. Personal interaction with CFIA representative *(Show if B4 5 Personal interactions)*
6. CFIA website *(Show if B4 6 CFIA website)*
7. Social media *(Show if B4 7 Social media)*
8. Podcasts *(Show if B4 8 Podcasts)*
9. CFIA's Inspect and Protect newsletter *(Show if B4 9 I and P newsletter)*
10. Through an industry association *(Show if B4 8 Industry Association)*
11. <<B4.specify(11)>> ____ *(Show if B4 11 Other Specify)*

❍ 10 10 Very satisfied

❍ 9 9

❍ 8 8

❍ 7 7

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1

❍ 0 0 Not at all satisfied

B8

Please rank the top 3 service elements. When your company assesses the services offered by the Canadian Food Inspection Agency (CFIA), which elements are the most important?

Start by selecting the reason that you consider to be most important. Continue to rank (up/down) in order of importance. Please rank order the top 3.

RANDOMIZE

______ The services are easy to understand *

______ I can access all the services offered by the CFIA in one place *

______ The services offered by CFIA help prevent non-compliance *

______ I can contact a CFIA representative for clarification *

______ Services are available when I need them*

______ Other (Specify) ___________________ANCHOR

B8other *Show if B8 Other in top 3*

Do you feel that any other service offered by the Canadian Food Inspection Agency is more important?

Please do not enter personally identifying information (e.g., name, email address, phone number, mailing address), as anything you enter may be shared with the sponsor of this research.

____
____
____
____
____

B9

How would you prefer the CFIA communicate with you in the future? Select any that apply.
RANDOMIZE

- ❍ 1 Mailed documents
- ❍ 2 Telephone communications
- ❍ 3 Virtual chat from the CFIA website or My CFIA
- ❍ 4 Email (including CFIA Listservs)
- ❍ 5 Portal notices in My CFIA
- ❍ 6 In person interaction with CFIA representative
- ❍ 7 CFIA website
- ❍ 8 Social media
- ❍ 9 Podcasts
- ❍ 10 CFIA’s Inspect and Protect newsletter
- ❍ 11 Through an industry association
- ❍ 12 Other (specify): ____
- ❍ 99 Not applicable: I wish the CFIA would not send me any future communications

B10

When trying to understand new requirements and regulatory priorities, what is the best way to have more open and clear discussions with CFIA regulators?

❍ Informal quarterly consultations *

❍ Formal consultations*

❍ Industry association events *

❍ Other (specify): ____

❍ Not applicable: I wish the CFIA would not send me any future communications

*Levels marked with * are randomized*

B11. If the CFIA was holding webinars, what topics would drive the most interest? Select all that interest you.

RANDOMIZE

1. How to use MY CFIA portal to apply for licences and other permissions (i.e., export certificates, permit to import, certificate of free sale)
2. Preventive control plans
3. Traceability
4. Import requirements
5. Labelling
6. Other______ **(ANCHOR AT BOTTOM)**
7. Don’t know/Prefer not to say **(ANCHOR AT BOTTOM)**

B12

Do you have any other opinions or comments that you would like to share about food safety or the CFIA?

No comments ☐

OPEN END

Page SecX

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?

❍ 1 Sole proprietor / just me

❍ 2 2 to 9 employees

❍ 3 10 to 49 employees

❍ 4 50 to 99 employees

❍ 5 100 to 499 employees

❍ 6 500 to 999 employees

❍ 7 1000 to 4999 employees

❍ 8 5000+ employees

❍ 9 I don’t know/ prefer not to answer

X2

What is the approximate annual revenue of your company?

❍ 1 Less than $100,000

❍ 2 $100,000 to $499,999

❍ 3 $500,000 to $999,999

❍ 4 $1 million to less than $ 25 million

❍ 5 $25 million to less than $100 million

❍ 6 $100 million or more

❍ 7 I don’t know/prefer not to answer

X3

How long has your company been in operations?

❍ 10 Less than a year

❍ 11 More than 1 but less than 5 years

❍ 12 5 or more years but less than 10 years

❍ 13 10 or more years but less than 25 years

❍ 14 More than 25 years

❍ 15 I don’t know/prefer not to answer

X5

In which regions does your company currently do business?

Select all that apply

❑ 1 British Columbia

❑ 2 Alberta

❑ 3 Saskatchewan

❑ 4 Manitoba

❑ 5 Ontario

❑ 6 Quebec

❑ 7 New Brunswick

❑ 8 Prince Edward Island

❑ 9 Nova Scotia

- ❑ 10 Newfoundland and Labrador
- ❑ 11 Yukon
- ❑ 12 Nunavut
- ❑ 13 Northwest Territories
- ❑ 14 United States of America
- ❑ 15 Outside of the United States of America or Canada

X6

Please check the different regions where your company offices or facilities are located and where CFIA food safety regulations are applicable.

Select all that apply

- ❑ 1 British Columbia
- ❑ 2 Alberta
- ❑ 3 Saskatchewan
- ❑ 4 Manitoba
- ❑ 5 Ontario
- ❑ 6 Quebec
- ❑ 7 New Brunswick
- ❑ 8 Prince Edward Island
- ❑ 9 Nova Scotia

❑ 10 Newfoundland and Labrador

❑ 11 Yukon

❑ 12 Nunavut

❑ 13 Northwest Territories

❑ 14 United States of America

❑ 15 Outside of the United States of America or Canada

X7

What is the ownership status of your company?

❍ 1 Publicly traded

❍ 2 Privately held

❍ 3 Government/Crown

❍ 4 Not sure

X8

Is your company based in Canada, or does it have its headquarters elsewhere?

❍ 1 Headquarters located in Canada

❍ 2 Headquarters located outside of Canada

❍ 3 Not sure

X9 – Would you consider the organization to be a family-owned organization?

1. Yes
2. No
3. Don’t know / Not sure

X10
Would you describe your company as Indigenous managed or owned?

❍ 1 Yes

❍ 2 No

❍ 3 Unsure

X11
For statistical purposes only

What is your gender?

❍ 1 Male

❍ 2 Female

❍ 3 Other

❍ 4 Prefer not to answer

X12. Approximately, what percentage of individuals might identify as a visible minority in senior management (including owner) roles? Please note your percentage within the following range: a minimum of “0” and a maximum of “100.”

[If Respondent hovers over/clicks the word “Visible Minority”, show the following: The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported. To better understand the composition of leadership within Canadian food businesses, we are asking about race and other demographic characteristics of the leadership group. An estimate is fine for this question and if you do not know that is fine as well.]

• Visible minority __________ %
• I don't know

X13

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

Please note your percentage within the following range: a minimum of “0” and a maximum of “100.”

[If Respondent hovers over/clicks the word “Female”, show the following: The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported. To better understand the composition of leadership at Canadian food businesses we are asking about gender and other demographic characteristics of the leadership group. An estimate is fine for this question and if you do not know that is fine as well.]

- Female __________ %

I don’t know

Thanks for completing this 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

Ending page

https://inspection.canada.ca/eng/1297964599443/1297965645317