CFIA Public Opinion Research for the Food Business Line 2023 to 2024

Canadian Food Inspection Agency

Final report

March 2024

Prepared for:
Canadian Food Inspection Agency
Supplier name: Quorus Consulting Group Inc.
Contract award date: December 15, 2023
Delivery date: March 2024
Contract amount (incl. HST): $261,052.60
Contract number: CW2341947
Public opinion research number: POR- 103-23

For more information, please contact:
Information@inspection.gc.ca
Ce rapport est aussi disponible en français.

CFIA Public Opinion Research for the Food Business Line 2023 to 2024
Final report
Prepared for the Canadian Food Inspection Agency
Supplier name: Quorus Consulting Group Inc.
March 2024

This public opinion research report presents the results of quantitative and qualitative research conducted by Quorus Consulting Group Inc. on behalf of the Canadian Food Inspection Agency in February and March 2024. The research involved eight online focus groups with food industry representatives, ten online focus groups with Canadian consumers aged 18 and older, 850 telephone surveys with individuals with responsibility for food safety and quality control at their place of business, and 1,500 online surveys with Canadian consumers 18 and older.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique pour le secteur alimentaire 2023 à 2024

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

Catalogue number:
A104-631/1-2024E-PDF

International standard book number (ISBN):
978-0-660-70116-5

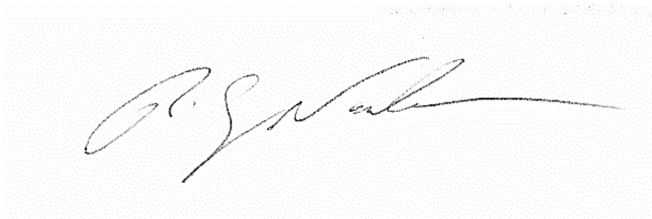
Related publications (registration number: POR- 103-23):
Catalogue number: A104-631/1-2024F-PDF (final report in French)
ISBN: 978-0-660-70117-2

Political neutrality certification

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

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

Signed:



March 20, 2024
Rick Nadeau, President
Quorus Consulting Group Inc.

Table of Contents

Executive Summary

Research purpose and objectives

The Canadian Food Inspection Agency (CFIA) has a mandate to verify food sold in Canada is safe and accurately represented. The CFIA achieves this through enforcement of Canada's federal food legislation, including the Safe Food for Canadians Act (SFCA) and its regulations (SFCR) which introduced new requirements for food businesses as of January 15, 2019.

The CFIA also develops and delivers programs and services designed to protect Canadians from preventable food safety hazards, to ensure that food safety emergencies are effectively managed, food is accurately represented, and to ensure that the public is aware of—and contributes to—food safety. The SFCR provide clear and consistent rules for food commodities so that consumers can be confident that food on grocery shelves is safe to eat, whether it is produced in Canada or abroad. The regulations also help get unsafe food off the shelves faster by requiring businesses that import or prepare food for export or interprovincial trade to trace their food back to their supplier and forward to whom they sold their products.

Canadian law prohibits the labelling, packaging, treating, processing, selling or advertising of any food in a manner that is false, misleading or deceptive to consumers. Food fraud can mislead consumers and is also a food safety issue (for example, if products contain undeclared allergens). The CFIA works to raise awareness of and protect consumers from food misrepresentation by conducting inspections, analyzing food samples and taking enforcement action.

The objective of this research is to gain a better understanding of **industry** awareness, motivations, perceptions and attitudes about:

- The various roles and responsibilities within the food safety system, in particular to measure the level of awareness of their own responsibilities in the system;
- Federal food regulations as they apply to online sales and importing;
- Resource needs and barriers to complying with regulatory requirements, to identify root causes of non-compliance and support development and implementation of compliance promotion, communications, and support service activities;
- Current services and expectations on future services and programs, such as My CFIA;
- Specific messaging, including compliance promotion tools and communications products;
- The effectiveness and satisfaction of the SFCR communications and related communications from various services, such as My CFIA and Ask CFIA;
- How requirements change for businesses may vary depending on demographic characteristics of ownership or clientele;

- Satisfaction with guidance received from Ask CFIA and rating of overall experience in using the service; and,
- Industry's opinion on using third-party verification systems.

Additionally, the research will aim to gain a better understanding of the following among **consumers**:

- Awareness and understanding of food safety and food fraud, and how the CFIA addresses them;
- Awareness of the CFIA's online food concern reporting tool;
- Trust that CFIA takes enforcement action to protect consumers from food fraud;
- Habits and concerns about food safety;
- Habits and concerns about best-before dates;
- Public trust that fish is accurately labelled and safe to eat;
- Sources of information on food safety and food fraud;
- Perceptions and concerns about food fraud;
- Awareness and effectiveness of CFIA communications regarding food fraud; and,
- Awareness and understanding of CFIA transparency regarding food fraud enforcement activities.

Methodology

The research study consisted of the following four phases:

- Phase 1: Online focus groups with Canadian adults (aged 18+)
- Phase 2: Online focus groups with representatives of Canadian food businesses
- Phase 3: Telephone survey with representatives of Canadian food businesses
- Phase 4: Online survey with Canadian households

Qualitative research results – focus groups with consumers

This portion of the research consisted of ten online focus groups with Canadians aged 18+ (consumers) which Quorus completed between February 1 and February 10, 2024.

Overall views on and experiences with food fraud

Defining food fraud

To kick-off the focus groups with consumers, participants were shown the sentence, "Food fraud occurs when food is misrepresented," and asked to provide some examples of what they felt would constitute food fraud.

Participants commonly suggested inaccuracies with product weight or misleading labelling such as those labelled as "natural" or "healthy" but contain artificial ingredients, fish products that are farmed, but do not specify origin on package, or meat that is mechanically tenderized but does not say so on package. A few mentioned products being falsely labelled as "organic" "free-range", or fish being labelled incorrectly.

Sources of information on food fraud

Some participants recalled seeing examples of food fraud on social media platforms such as Facebook, Instagram, Twitter or Reddit, or on the news, documentaries as well as from friends and family.

For the most part, participants did not actively look for information on food fraud but rather came across news articles or posts on the topic.

Level of concern with food fraud

Most participants were not overly concerned about encountering food fraud when purchasing food from grocery stores. Those who were more concerned with food fraud tended to be those with a food allergy or dietary restriction in their household as well as those who were health conscious. These participants tended to pay closer attention to ingredient lists and nutrition labels to ensure that the products they are buying are suitable for their dietary needs.

Participants suspected animal products to be most susceptible to food fraud, particularly when it comes to labels such as "organic", "natural", "free-range", "grass-fed", "triple A" or "halal". Some had similar concerns regarding "organic" labelling on fruits, vegetables or packaged foods.

Some also felt that processed or packaged foods may be subject to food fraud as it would be easier for companies to add cheaper ingredients as a way to save costs and consumers likely would not notice.

When specifically asked about fish sold in Canada, most said that they trusted that it is for the most part, properly labelled as they had no reason to believe otherwise.

Some felt that fraud would be more likely to occur in packaged fish such as canned tuna or fish sticks, which may use a mix of less expensive fish rather than the type of fish listed on the package and consumers would be less likely to notice the discrepancy.

A majority of participants agreed that the fish sold in Canada is safe to eat. Rather than concerns about food fraud, concerns about safety of fish mainly pertained to its freshness.

Personal experiences with food fraud

Overall, very few participants had personally experienced food fraud. That said, some admitted that they might not know if they had encountered or consumed a product that was fraudulent.

As a result of suspected food fraud, some participants said they did not buy the product again, did not consume the product out of concern for potential allergens, returned the product to the store, or emailed the company. None of the participants indicated having reported their concern with a government agency such as the CFIA.

If they were to encounter food fraud in the future, many participants suggested they might return the product to the store they purchased it from to try to get refunded, especially if it was an expensive item. Others would try to contact the supplier/manufacturer directly.

If the fraud resulted in a health consequence such as food poisoning or an allergic reaction from an undisclosed ingredient, participants would be much more likely to take action. In these cases, a couple of participants suggested that they may look up the government department that handles these complaints.

Views on how food fraud is managed in Canada

For the most part, participants felt that food fraud is well managed in Canada. As well, there was a high level of confidence that food in Canada is safe to eat. This sentiment came from the fact that in most groups, none or very few participants had experienced food fraud, or knew somebody else who had. Additionally, a few mentioned that when food safety issues occurred, as seen through food recalls, actions are quickly taken to inform Canadians and pull these products from shelves, which gave them reassurance.

Most assumed that there is a government agency responsible for managing food safety, however only a few mentioned the CFIA organically. There was some general agreement that there should be more awareness of the topic of food fraud, how the government is managing the issue as well as what to do if you encounter it. Some mentioned that they would be unsure where to report food safety issues or food fraud if they were to encounter it.

Awareness of CFIA's involvement in food fraud

Participants were informed that the CFIA is responsible for regulating food in Canada and verifying that companies are complying with the federal food rules. While many had heard of the CFIA before, very few had ever thought about contacting the CFIA when they encountered food fraud or a similar food safety issue. Instead, they typically thought of contacting the store or the manufacturer.

Many were apprehensive about contacting the CFIA regarding food fraud with concerns that it would probably take awhile to get a response, or it might not be worth the effort, especially if it was just a mislabelling issue rather than a food safety concern. However, if the food fraud was to result in a health consequence, more would consider contacting the CFIA.

With that said, some felt that it was good to know that the CFIA could be a contact for food fraud concerns, as some explained they would trust a government department or agency to do more to look into the actual issue than the store where the product was sold or the manufacturer.

When shown a screenshot of the CFIA's online food concern reporting tool, very few had seen or heard about it before.

Views on food recalls

Participants varied with their concern regarding food recalls, with some on high alert for recalls while others do not pay much attention to them.

Participants typically learn of food recalls from the news, social media, from signage or information boards in grocery stores, or from friends and family. A handful of participants said they received email alerts.

Only a small number of participants were aware of email alerts prior to the discussion. When specifically asked about this type of notification, interest in a subscription service to receive recall email notifications from an agency like CFIA was quite high.

Reactions to CFIA messaging regarding food fraud

Reactions to a social media post concept

In order to gain feedback on CFIA messaging regarding food fraud, a social media post was tested with participants. Participants were informed that for legal reasons, the post could not name the company that was being discussed.

Some participants felt that the post was good as it could help raise awareness of the topic of food fraud and remind Canadians that the CFIA is doing investigations and holding companies accountable. Others said that they would probably scroll past this post if they saw it on social media as it does not really affect them or they did not deem this misrepresentation to be a "big deal".

Many were concerned about the fact that the company could not legally be named as they felt that it does not allow Canadians to make informed decisions about their purchases. Some also felt that if the company were named, it would hold that, and probably other companies, more accountable to follow regulations in the future.

Reactions to CFIA messaging

Participants were also asked to provide feedback on the following series of statements which the CFIA could use in some of its communications with Canadians:

- Each day, CFIA inspectors work to verify that industry is operating in compliance with Canadian requirements.
- Inspections are targeted in areas of highest risk, including those most at risk for not meeting Canadian standards and regulations.
- This is done all along the supply chain and involves numerous stakeholders and jurisdictions.
- When non-compliance is found, the CFIA takes enforcement action to protect Canadians.
- Consumers can be confident that the food they buy is accurately represented and safe.

Overall, many felt that these statements were reassuring and alleviated some concerns and worries they had. Some would like to see more information about how the investigation process works as well as what the regulations are in general.

Some felt that the statements were vague and should include statistics or facts to make the message more believable or reassuring.

Overall views on and experiences with "best before" dates

An important research objective was to better understand Canadians' views and use of "best before" dates.

Many were confident that they understood the difference between an expiration date and a "best before" date on food products. A few were less confident in the difference between these two dates with some admitting that they will throw food away once it is past the "best before" date.

To make sure all participants were on the same page, definitions were provided:

An **expiration date** is the last day a food can safely be consumed.

“Best before” dates are about food freshness, quality and how long they should last unopened, not about food safety.

After hearing these definitions, some admitted that they did not realize the difference between these dates.

Most pay attention to “best before” dates at the grocery store, particularly when it comes to meat or dairy products (particularly milk). These participants typically wanted to purchase items that will stay fresh for longer once they bring it home rather than because of food safety concerns. A few said that they will purchase discounted food that is close to the “best before” date with intentions to use it right away or freeze it.

Most participants were more lenient on best “before dates” when it comes to food products in their home, especially pantry items. However, they remain cautious with certain items such as meat, fish and milk. These participants explained that they will check for signs of spoilage to determine freshness and decide whether they should consume it.

When the topic of removing “best before” dates from food items was probed, most were opposed. Participants generally felt that even though “best before” dates should not necessarily be used as a firm date, they are still beneficial as a guideline, especially when it comes to items such as meat, fish and dairy products. Participants would be less concerned about the removal of “best before” dates on items such as spices or non-perishable items.

There were concerns that without “best before” dates, items might sit on the shelves at stores for long periods of time and it might be difficult to know if an item has already spoiled before purchasing it.

While several felt that removing “best before” dates would likely reduce food waste, they suggested that instead there should be more awareness on the difference between an expiry date and “best before” date so that consumers would be encouraged to inspect items that are past their “best before” date rather than just throwing them out.

Qualitative research results – focus groups with food businesses

This portion of the research consisted of eight online focus groups with food business representatives which Quorus completed between February 14 and February 21, 2024.

General attitudes towards and awareness of food regulation and compliance

Perceptions of Canada's approach to food regulation

For the most part, food regulation in Canada was described as strict but fair, offering solid consumer protection. From a business perspective, some felt it was somewhat demanding, especially when it came to paperwork and labelling. As well, a number of participants spoke of regulations being difficult to understand or implement for new businesses in particular.

While some said the CFIA was easy to get in touch with, others said that it was not always easy to get the answers they were looking for regarding regulations. Some also felt that even when given answers, they did not feel that the CFIA was "on their team" or specific enough with their guidance to help them solve an issue.

Outcome-based regulations

Familiarity with the term "outcome-based regulations" was quite low. However, many participants could guess fairly accurately what was meant by the term.

Overall, many felt that from a business perspective, this could sometimes make things difficult, since it could be trial-and-error when trying to either start a new business, when trying to comply with new regulations or when fixing issues of non-compliance. This was particularly said by smaller businesses, since they did not have dedicated staff to deal with regulations. As well, small business owners in particular said that it would have been easier with more "how to" supports from the CFIA (for example, guidance or checklists).

On the other hand, some did feel it made sense to put the responsibility on businesses to understand their own processes and how they can best comply with regulations, especially for those who had been in the industry for a long time. It was also said to signal respect for industry and an acknowledgement that professionals in their various industries would know well (or best) how to achieve outcomes, and that the regulator is open to listening, learning and work together in a collaborative way.

There was some agreement that if food products are safe, they by definition meet regulatory requirements. On the other hand, some countered that there was more to meeting requirements than only food safety (for example, labelling, traceability).

Safe Food for Canadians Regulations (SFCR)

Familiarity with SFCR

Not everyone was familiar with the fact that the CFIA's regulations were called the Safe Food for Canadians Regulations (SFCR). Familiarity with these regulations was noticeably higher among participants whose main role was food safety and/or quality control and lower among businesses whose primary activity is retail. Among those who were familiar with the SFCR, most recognized that these regulations are outcome-based although, as noted above, not everyone agreed that they should be.

When asked about key safety requirements in the SFCR, a few participants could name specific elements of it, such as traceability, pest control, building and/or equipment maintenance, other preventive controls, licensing, hazards planning, labeling, and packaging. When listed, many were familiar with these elements, but they often referred to their own specific procedures and standards rather than to the larger umbrella terms or regulations they might fall under.

For the most part participants said it is relatively easy to comply with food regulations in Canada. In some cases, participants say they exceed the CFIA standards because they feel those are the minimum requirements and they want to do better.

In terms of compliance challenges, specific points were raised around interactions with the CFIA. More specifically, participants would refer to issues working with or contacting CFIA, for example not getting answers as quickly as they had hoped, getting conflicting opinions or advice depending on who at CFIA they spoke to, feeling vulnerable or unsure as a business when trying to comply or even knowing if they are on the right path to compliance, or unclarity about expectations more generally.

Other types of compliance challenges raised in these groups included not always knowing whether or not suppliers closely followed regulations, trying to figure out and comply with inter-provincial trade regulations, labelling, expiry dates, and excessive paperwork.

Participants were also asked what explains their successes in complying with food regulations. Many businesses explained that Canadian products are held to high standards and are counted among the best in the world, which in turn opens up a lot of international markets for them. Traceability and detailed record-keeping by them as well as by all parts of the supply chain were also said to help them meet regulations. Some also attribute some of their success in complying to their good relationship with the CFIA in general and also to inspectors being helpful.

CFIA's role in food safety regulation

For the most part, CFIA's role is generally understood to be that of regulator for the Canadian food industry, and to ensure the safety of the food Canadians eat. It was also mentioned that one of its roles is to ensure that uniform standards are met across the country and throughout the whole supply chain.

In terms of helping businesses comply with food regulations in Canada, those who felt that the CFIA had in fact been helpful to them in the past considered the CFIA a partner. These participants often spoke about the education aspect – the CFIA helping them to find information or directly sending them information they required regarding the regulations, often particularly when starting their business.

"Best before" dates

Opinions about "best before" dates generally reflect that they serve an important role in food safety where they are required, particularly from a consumer perspective.

When participants said it played some role in their business, the most-often mentioned context was for inventory control. "Best before" dates were also seen as a way to protect businesses from consumer complaints. It also makes some feel like it represents their guarantee to customers, that their product will still be fresh or good for consumption until that date, acting in a way as a quality control stamp (rather than only a food safety measure).

There is a general sense that "best before" dates are important for consumers as well as for businesses, and that doing away with them would lead to, at best, confusion, and, at worse, consumer safety being compromised. Again, it was also brought up that "best before" dates are important for liability purposes, and that without them, businesses could more easily get in trouble (or be asked for refunds, etc.) if consumers get sick when eating bad food. There was also some sense that removing "best before" dates just "didn't feel right" for businesses.

Food fraud

In order to level-set common understanding, food fraud was explained to participants first, as follows:

Food fraud may occur when food is misrepresented. It can pose serious health risks if, for example, unidentified allergens or hazardous materials are added to food products. It can also have an economic impact on the buyer (for example, paying for a product that is actually of lower quality).

There are 4 main types of food fraud:

- Substituting

- Adulterating or diluting
- Mislabelling
- Making false claims or misleading statements

Very few participants had directly experienced or been impacted by food fraud, and even fewer had received a consumer complaint about food fraud. Hypothetically, if they would have been accused of or found to have committed food fraud, participants generally said they would get to the bottom of it and rectify it as soon as they could, first by investigating their own processes and procedures, and then by moving back through the supply chain and ask questions to find the root cause.

Preventative controls to avoid food fraud they have in place for the most part include what participants call their standard quality control procedures, for example weighing products, checking them visually or otherwise, and carefully checking the labels of anything they use to make their end products. Some also conduct random testing on products they receive from their suppliers.

However, for many participants it was difficult to pin-point specific controls they have in place to prevent being impacted by food fraud specifically. Those who use suppliers of raw materials often explain how these are solid, trusting relationships and that they carefully vet new suppliers, and get to know them. Many also ensure their suppliers have needed certifications and proper traceability procedures in place. As well, there is generally a strong level of trust in the Canadian food safety regulatory system, which leads to businesses trusting that if products have made it to them through this system, it is meeting the standard and they can in turn trust the label.

Responses were mixed when asked whether they would report suspected food fraud in their industry to the CFIA. While some would not, others said they might, but likely only after speaking to the suspected company directly or going through an industry association to report it first. Some participants mentioned that they would be more likely to report it if it could be done anonymously. It was also mentioned that it would depend on the “level of proof” they had. The primary motivation for wanting to report suspected fraud is if the fraud results in a competitive advantage for the accused. As well, there was concern for repercussions on the entire food category or industry vertical if fraud is not appropriately addressed.

Many participants agreed with the CFIA publishing more information about misrepresented products identified through inspection activities. They felt that the type of information published should include details of what rules were broken, how it happened, what the impact on consumers or food safety was, and how it was detected. Most participants felt that in order to be fully transparent, publishing the product name, brand name and/or company name that was found to have committed food fraud should be part of the information made public.

However, some said that this was their perspective as a consumer, but that from a business perspective, they felt that the CFIA should carefully weigh the impacts this could have on a company, and that this should only be made public if repeated warnings were not heeded or if food fraud was a trend or an ongoing issue with a brand or company. There also had to be solid proof of who perpetrated it and that it was purposeful, systemic or malicious, and not the result of accidental human error or a simple one-time oversight. Some also mentioned that the CFIA should also be transparent when it comes to companies rectifying the problem and close the loop by publishing that information as well.

Among participants who sell fish or seafood products, there is also a high level of confidence that that the fish and seafood products they sell are properly labelled for the type of fish when it comes to the common name. If food fraud were to happen in this category, some assumed that it would be perpetrated at or close to the source before the product is imported into Canada. Others believe the fraud would be committed at the store level.

CFIA tools

A variety of CFIA virtual tools were shown to participants in order explore familiarity and collect feedback.

CFIA website

Several participants said they had used the CFIA website when looking for information related to their business.

Of those who had used the website, feedback was mostly positive. These participants were generally able to find what they needed on the website. Some commented on the ease of finding information through the menu options. When asked to provide other feedback, some suggested that recall information could be more noticeable and some also suggested that the CFIA could offer more resources which business owners or managers could use to show employees.

Participants were generally not familiar with the virtual assistant and were unable to offer feedback.

My CFIA

Only a few participants had used My CFIA in the past and awareness of the service was generally quite low among the others.

Of the few who had used this service, most felt it was user-friendly and convenient when they needed to renew or amend a licence. A couple felt that it was challenging to figure out at first, but became easier and that when they had questions, CFIA employees were helpful.

Ask CFIA

A handful of participants had reached out to the CFIA through the website, however several explained that their business has a contact or inspector that they will contact instead if they have questions.

Very few were aware of the Ask CFIA service, although a couple said it looked familiar and that they think they may have used it in the past to ask questions.

Effectiveness of SFCR communications

Few participants received communications or recalled receiving such communications directly from CFIA. For the most part, communications about regulations came from third parties such as newsletters from industry associations or informal communications with others within their industry.

Receiving information from industry associations seemed to be a preference for some who felt that communication coming directly from the CFIA may get lost, or likely would not be very tailored to them. There would be interest in receiving more communications from the CFIA if it could be divided by industry so that businesses can look for the relevant information.

When asked how communications could be improved, some liked the idea of having a contact at the CFIA that they can quickly reach out to for information as needed. Similarly, a few felt that the business relationship with the CFIA should feel more like a partnership where the business can work together with their CFIA contact along the way rather than the relationship being more unilateral.

It was also suggested that there is a lack of bilingual services and support in regions where French is a minority language.

Qualitative research disclaimer

Qualitative research seeks to develop insight and direction rather than quantitatively projectable measures. The purpose is not to generate “statistics” but to hear the full range of opinions on a topic, understand the language participants use, gauge degrees of passion and engagement and to leverage the power of the group to inspire ideas. Participants are encouraged to voice their opinions, irrespective of whether or not that view is shared by others.

Due to the sample size, the special recruitment methods used, and the study objectives themselves, it is clearly understood that the work under discussion is exploratory in nature. The findings are not, nor were they intended to be, projectable to a larger population.

Specifically, it is inappropriate to suggest or to infer that few (or many) real world users would behave in one way simply because few (or many) participants behaved in this way during the sessions. This kind of projection is strictly the prerogative of quantitative research.

Quantitative research results – online survey with Canadian households

Familiarity with the CFIA

Unaided, over half of respondents were unsure of any organizations in Canada that are dedicated to food safety (53%). More than 1 in 10 respondents thought of the CFIA (16%) , followed by Health Canada (11%), Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec (6%), and the Food and Drug Administration (6%).

Roughly 3 in 5 respondents (59%) were not familiar with the activities of the CFIA while nearly a third (31%) were somewhat familiar. A smaller proportion reported being very familiar with the activities of the CFIA (8%).

When provided a list of organizations and asked which ones they think of when it comes to food safety in Canada, the most common organization selected was Health Canada (68%) followed by the Canadian Food Inspection Agency (61%) and then the Public Health Agency of Canada (48%).

When presented with a list of food safety related roles, 62% believed that the CFIA was involved in checking food products being imported into the country. A similar proportion believed they were involved in conducting food safety investigations (59%), issuing food recalls (59%), and taking enforcement action against food producers who aren't following Canada's laws (57%).

Far fewer believed that the CFIA play the following types of roles:

- is involved when it comes to live animals being exported from Canada to other countries to be consumed as food (35%).
- handles complaints that a restaurant has a dirty kitchen (26%)
- handles complaints when a person gets food poisoning from cooking and eating undercooked meat (16%).

Contact with the CFIA

Most respondents had not had any interactions with the CFIA (79%). Nearly 1 in 10 had read articles or watched videos from the CFIA (8%) or visited the CFIA website (7%).

Nearly a quarter of respondents (23%) had recently seen, heard, or read something about the CFIA. When asked where they might have recently seen, heard, or read something about the CFIA, 50% cited traditional media such as newspapers, television, or radio and 39% cited social media (not including the CFIA's social media) such as Facebook (16%), Instagram (14%), YouTube (13%), X (formerly Twitter, 11%), TikTok (4%), or Reddit (3%). Additionally, more than two thirds of respondents (34%) had recently seen, heard, or read about the CFIA on internet sources other than social media.

Understanding the CFIA

Those who had recently seen, heard, or read something from the CFIA were asked how well they understood the information. More than half of respondents (52%) understood completely (a score of 6 or 7 on a 7-point scale) and 38% somewhat understood (a score of 4 or 5).

Respondents were asked the extent to which they agreed with various statements regarding the CFIA. Nearly 3 in 5 respondents (58%) strongly agreed that the CFIA is believable when it issues a statement (scores of 6 or 7 on a 7-point scale), 50% strongly agreed that all businesses are treated fairly by the CFIA, and 47% strongly agreed that CFIA enforcement activities are strong enough to encourage companies to comply with the regulations.

When presented with a list of adjectives and asked which ones best described the CFIA, the most popular terms selected included: scientific (52%), trusted (50%), informative (49%), responsive (36%), fair (31%) and efficient (29%).

CFIA's role in food safety awareness

When asked how well they believed the CFIA was doing at safeguarding the food sold in Canada, 43% believed that the CFIA was doing well (a score of 6 or 7 on a 7-point scale) and 32% believed it was doing somewhat well (a score of 4 or 5).

A quarter of respondents (25%) reported that they had looked for or read information specifically about food safety or food fraud over the past few years. Among these respondents, the internet (excluding social media) was the most common source of information (61%) followed by traditional media (46%) and social media (43%).

A majority of respondents (78%) felt the statement "I believe food recalls illustrate that the food safety system is working", was true.

When it comes to food recalls, 25% of respondents would say they had a great deal of concern (a score of 6 or 7 on a 7-point scale) while 43% had some concern.

Trusting the CFIA's food safety procedures

When asked how much they trust the CFIA to do what is right to help ensure that food is safe in Canada, 43% reported high trust (a score of 6 or 7 on a 7-point scale) and another 2 in 5 (41%) said they somewhat trusted the CFIA to do what is right (a score of 4 or 5).

Respondents were also asked a series of questions related to food consumption and "best-before" dates.

When it comes to deciding whether a food can still be eaten, respondents most commonly look for and consider signs of spoilage (81%), expiry dates (66%), what kind of food it is (66%), how it was stored (65%), "best before" dates (64%) and how long they have had the food (62%).

When it comes to "best before" dates and expiration dates, 24% reported that these terms meant the same thing to them while 72% felt the terms meant different things to them.

Other key findings related to date labels, including "best before" dates included:

- Nearly half (48%) were very confident that they know how to use date labels when judging if a food can still be eaten (a score of 6 or 7 on a 7-point scale)
- A quarter of respondents (25%) regularly throw out food when it has passed the "best before" date (7% always do while 19% often do) while 43% sometimes do this.
- Nearly 3 in 10 respondents (29%) reported that they regularly purchase food that has been discounted because the "best before" date is approaching (4% always do while 25% often do) while 39% sometimes do so.

More than half of respondents (56%) reported being very confident in the safety of food sold in Canada (a score of 6 or 7 on a 7-point scale). Another 37% said they were somewhat confident (a score of 4 or 5).

When asked to rate how well they believe the CFIA is doing when it comes to verifying that food sold in Canada is safe, 49% felt that the CFIA was doing well (a score of 6 or 7 on a 7-point) and 38% felt that the CFIA was doing somewhat well (a score of 4 or 5).

Other key findings related to some of the roles the CFIA plays when it comes to food safety included:

- Just over half of respondents (51%) agreed (scores of 6 or 7 on a 7-point scale) that the CFIA looks out for the best interests of Canadians,
- More than 2 in 5 (42%) agreed that the CFIA is effective in enforcing food safety regulations.

- Roughly a quarter (24%) agreed that getting information about food, plant or animal safety from the CFIA is easy while 39% somewhat agreed.
- Less than a fifth (17%) agreed that CFIA regulations are not strict enough while 36% somewhat agreed.

Overall, 79% support the CFIA publishing names of companies that receive administrative monetary penalties (AMP's) due to having not complied with regulations.

Food fraud

Next, respondents were asked a series of questions related to food fraud.

Just over a quarter of respondents (26%) reported a great deal of concern regarding food fraud when they go grocery shopping while 40% were somewhat concerned.

For the most part, respondents support the CFIA publishing names of companies that have been found to have committed food fraud (68% strongly support while 21% somewhat support).

When asked how well they believed the CFIA was doing when it comes to safeguarding from misrepresented food sold in Canada, 35% believed that the CFIA was doing well (a score of 6 or 7 on a 7-point scale). Additionally, 42% believed the CFIA was doing somewhat well (a score of 4 or 5).

Other key findings related to the role the CFIA plays in relation to food fraud included:

- Nearly 2 in 5 respondents (39%) reported a high level of trust in the CFIA to inspect food product labels for ingredients to which people may be allergic or sensitive (scores of 6 or 7 on a 7-point scale).
- A similar proportion (41%) reported high confidence that the CFIA will take enforcement action to protect consumers from food fraud (scores of 6 or 7 on a 7-point scale).

Less than 1 in 10 (7%) had experienced food fraud within the past year. Among these respondents (n=111), 11% believed they had encountered misrepresented meat products, followed by fish products (9%), cereal (7%), dairy products (7%), snack foods (6%), baked goods (5%), vegetables (3%), organic products (3%), cooking oils (2%), juice (2%) and vegan products (2%).

Nearly a quarter of respondents (23%) said that if they suspected food fraud, they would definitely report it to the CFIA, while more than one third (37%) would probably report it. Among these respondents, 41% would know how to report it (9% definitely, 32% probably).

More than 1 in 10 respondents reported not eating or buying fish (13%). Those who eat or buy fish were asked to rate their level of trust on a series of statements related to fish products:

- More than 2 in 5 respondents (43%) reported high trust (scores of 6 or 7 on a 7-point scale) that the fish they buy is safe to eat while 46% reported moderate trust (scores of 4 or 5).
- A third (33%) reported high trust that the fresh fish they buy is properly labelled for the type of fish that it is while 48% reported moderate trust.
- When it comes to the multi-ingredient fish products that respondents buy (for example, fish sticks), 20% had high trust that these products are accurately labelled for the type of fish they contain while 49% reported moderate trust.

Respondents who eat or buy fish were also asked to which extent they trust various locations when it comes to the fish that they sell. Trust was highest when it comes to grocery stores with 36% reporting high levels of trust (scores of 6 or 7 on a 7-point scale). This was followed by fish mongers (32%), local markets (31%) and restaurants (28%).

Quantitative research results – telephone survey with Canadian food businesses

Awareness of food safety regulations

Two thirds of business representatives (66%) reported managing public trust and corporate reputation as a high priority and a similar proportion (63%) reported managing regulatory issues as a high priority. Fewer said that implementing new technology or innovative solutions was a high priority for their business (30%).

Nearly two thirds of businesses (63%) reported being very familiar (scores of 6 or 7 on a 7-point scale) with the activities of the CFIA while 22% were somewhat familiar (scores of 4 or 5).

Roughly 4 in 5 (81%) believe they clearly understand the food safety regulations that apply to their business (scores of 6 or 7 on a 7-point scale) while 14% understand the applicable regulations somewhat well (scores or 4 or 5).

Two thirds of business representatives (66%) had recently seen, heard, or read something about the *Safe Food for Canadians Regulations* (SFCR).

Key findings among those familiar with the SFCR included,

- A majority (93%) believed the SFCR applied to their business while 72% believed that the SFCR applied to online sales of food products.
- Business representatives believed that the key safety requirements of the SFCR were general food handling or food safety (32%), sanitation controls (28%), temperature

controls (16%), "best before" or expiration dates (11%), labeling (11%), preventative control plans (11%) and traceability (10%).

- Nearly three quarters (73%) were clearly aware that a licence is required to import food products into Canada while 21% were somewhat aware.
- Maintaining traceability records was the biggest challenge of the SFCR (15%) followed by maintaining a written preventative control plan (13%) or implementing traceability labelling on products (11%).
  - Just under two fifths (39%) felt that none of the requirements were challenges for their business.

Nearly a third of business representatives (31%) reported that their business uses a private food safety or quality control certification system.

The most commonly used preventative measures used by businesses were traceability documents (63%) or traceability labelling (63%) followed by written preventative controls plans (55%) and having a SFCR licence (49%).

Transparency

More than half of business representatives (53%) viewed the CFIA as very transparent (scores of 6 or 7 on a 7-point scale) when it comes to determining if there are non-compliance of regulations while another quarter (25%) felt the CFIA was somewhat transparent (scores of 4 or 5) in this regard, while 8% believed they CFIA was not very transparent (scores of 1, 2 or 3).

Just over half (51%) felt that the CFIA was very transparent when it comes to reporting and publishing non-compliance results while nearly a quarter (24%) believed the CFIA was somewhat transparent in this regard. On the other hand, 7% viewed the CFIA as not very transparent.

"Best before" dates

Nearly half (46%) reported that their business benefits from "best before" date requirements.

Nearly two fifths (39%) reported that their business experiences negative impacts from "best before" date requirements.

A large majority of business representatives (88%) believed that there is a connection between "best before" dates and food waste.

More than one third (35%) perceived that an elimination of "best before" dates would have at least a somewhat positive impact on their business while 21% perceived that it would have a negative impact.

Food fraud

More than two fifths (42%) reported being very concerned with food fraud (scores of 6 or 7 on a 7-point scale) while another 21% reported being somewhat concerned (scores of 4 or 5). Conversely, 36% were not very concerned with food fraud (scores of 1, 2 or 3).

A minority of food businesses (14%) reported being affected by food fraud.

More than two thirds (68%) reported being very likely (scores of 6 or 7 on a 7-point scale) to report a fellow industry member of suspected food fraud to the CFIA while another 16% would be somewhat likely to report them (scores of 4 or 5). Conversely, 13% reported being not very likely to report suspected food fraud to the CFIA (scores of 1, 2 or 3).

More than one third of business representatives (37%) indicated they knew how to report suspected food fraud to the CFIA while 60% did not.

Less than 1 in 10 (7%) reported that their business had received consumer complaints related to food fraud or misrepresented food.

The majority of businesses that sell fish or seafood products (89%) reported high confidence that the fish or seafood products that they sell are properly labelled for the type of fish that they are (scores of 6 or 7 on a 7-point scale).

A majority of respondents were very confident (scores of 6 or 7) that all of the food products they sell are properly labelled (90%).

The most commonly suspected source of mislabelling was the domestic processor/ manufacturer (26%) followed by the importer (15%), pre-import in another country (12%), at retail (10%), at restaurants (10%), or at wholesale (9%). Many (16%) were unsure where mislabelling was most likely to occur.

Information search and understanding

Business representatives most often use the internet as a source of information about food safety regulations or requirements (22%) followed by internal resources such as head office or company policies (15%).

Business representatives were asked whether they had received any information from the CFIA within the past year. More than a third (36%) recalled receiving information from the CFIA while nearly 3 in 5 (58%) did not.

Those who had received information from the CFIA within most often reported receiving email notifications from the CFIA (71%) followed by personal interaction with a CFIA representative (18%) or telephone calls (13%).

More than 2 in 5 (44%) reported high satisfaction with CFIA communications (scores of 9 or 10 on an 11-point scale) and another third (33%) reported moderate satisfaction (scores of 7 or 8). Conversely, a fifth (21%) reported low satisfaction with communications from the CFIA (scores of 6 or lower).

Other key findings related to CFIA communications included:

- A majority felt that the frequency of CFIA communication was about right (75%) while 16% there was not enough communication and 6% felt there was too much.
- Most business representatives who had received information from the CFIA in the past year (91%) agreed that these communications are helpful and provide the information they need to know.
- Similarly, 85% agreed that communications from the CFIA are clear and easy to understand.
- When it comes to receiving communication from the CFIA, email was the most preferred channel (68%) followed at a distance by mail (11%).

One in 10 (10%) reported difficulties getting the information they needed from the CFIA over the past few years. These respondents most often cited difficulties getting information on regulations or regulatory changes (20%), labelling (17%), general information (13%), and industry and product specific topics (12%).

Nearly two fifths (39%) believed that the concept of "outcome-based" regulations was clear to them (scores of 6 or 7 on a 7-point scale) while it was somewhat clear (scores of 4 or 5) for 32% of businesses. Conversely, 23% felt the concept was not very clear (scores of 1, 2 or 3).

When asked to consider whether the SFCR are "outcome-based" regulations, nearly two thirds (64%) believed so while 12% did not. Nearly a quarter (24%) were unsure.

Ask CFIA

More than 1 in 10 (11%) business representatives reported having used the Ask CFIA service. Of these respondents, over half (54%) reported high satisfaction (scores of 6 or 7 on a 7-point scale) and more than a third (36%) reported moderate satisfaction (scores of 4 or 5).

Supplier name: Quorus Consulting Group Inc.
Contract number: CW2341947
Contract award date: December 15, 2023
Contract amount (including HST): $261,052.60
For more information, please contact the Canadian Food Inspection Agency at: Information@inspection.gc.ca

These results are presented and discussed in-depth throughout the detailed results section of the report.

Detailed results

Research purpose and objectives

The Canadian Food Inspection Agency (CFIA) has a mandate to verify food sold in Canada is safe and accurately represented. The CFIA achieves this through enforcement of Canada's federal food legislation, including the Safe Food for Canadians Act (SFCA) and its regulations (SFCR) which introduced new requirements for food businesses as of January 15, 2019.

The SFCR generally applies to food for human consumption (including ingredients) that is imported, exported, or inter-provincially traded for commercial purposes. It also applies to the slaughter of food animals from which meat products to be exported or inter-provincially traded may be derived. The regulations had a graduated coming into force schedule that started in January 2019, beginning with businesses that were previously registered under commodity-specific regulations (for example, meat, eggs, fish and seafood, dairy), and ending in July 2020 for businesses in the manufactured food sector. SFCR introduced three fundamental components that apply to most food businesses: licensing, preventive controls and traceability requirements.

Some of the requirements were phased in based on food commodity, type of activity and business size. As of November 1, 2022, the CFIA is conducting compliance activities of the SFCR requirements for all food sectors, including the final sector to be on-boarded – the manufactured food sector (MFS).

A review of the provisions and operations of the SFCA, including an assessment of the resources allocated to its administration and enforcement, must take place every five years. The first review is scheduled to take place in 2024-25.

As part of the CFIA's commitment to delivering timely information and guidance to regulated parties, the Agency continues to develop tools and services to help industry meet food safety requirements.

Food safety is a top priority for the Canadian Food Inspection Agency. The CFIA continually works to improve the overall health of Canadians. This includes ensuring that food is safely produced, accurately represented to Canadians, and properly labelled.

The CFIA develops and delivers programs and services designed to protect Canadians from preventable food safety hazards, to ensure that food safety emergencies are effectively managed, food is accurately represented, and to ensure that the public is aware of—and contributes to—food safety. Canada has a sound and internationally respected food safety system and food recall process. The SFCR provide clear and consistent rules for food commodities so that consumers can be confident that food on grocery shelves is safe to eat, whether it is produced in Canada or abroad. The regulations also help get unsafe food off the shelves faster by requiring businesses that import or prepare food for export or interprovincial trade to trace their food back to their supplier and forward to whom they sold their products.

In terms of ensuring that food is accurately represented, Canadian law prohibits the labelling, packaging, treating, processing, selling or advertising of any food in a manner that is false, misleading or deceptive to consumers. Food fraud can mislead consumers and is also a food safety issue (for example, if products contain undeclared allergens). The CFIA works to raise awareness of and protect consumers from food misrepresentation by conducting inspections, analyzing food samples and taking enforcement action. Combatting food fraud is a shared responsibility between government, industry and consumers. Since food fraud is meant to deceive consumers, it is not easy to know whether a food is fraudulent or not. Even so, consumers play an important role in identifying and tackling food fraud.

The objective of this research is to gain a better understanding of **industry** awareness, motivations, perceptions and attitudes about:

- The various roles and responsibilities within the food safety system, in particular to measure the level of awareness of their own responsibilities in the system;
- Federal food regulations as they apply to online sales and importing;
- Resource needs and barriers to complying with regulatory requirements, to identify root causes of non-compliance and support development and implementation of compliance promotion, communications, and support service activities;
- Current services and expectations on future services and programs, such as My CFIA;
- Specific messaging, including compliance promotion tools and communications products;
- The effectiveness and satisfaction of the SFCR communications and related communications from various services, such as My CFIA and Ask CFIA;
- How requirements change for businesses may vary depending on demographic characteristics of ownership or clientele;
- Satisfaction with guidance received from Ask CFIA and rating of overall experience in using the service; and,
- Industry’s opinion on using third-party verification systems.

Additionally, the research will aim to gain a better understanding of the following among **consumers**:

- Awareness and understanding of food safety and food fraud, and how the CFIA addresses them;
- Awareness of the CFIA's online food concern reporting tool;
- Trust that CFIA takes enforcement action to protect consumers from food fraud;
- Habits and concerns about food safety;
- Habits and concerns about best-before dates;
- Public trust that fish is accurately labelled and safe to eat;
- Sources of information on food safety and food fraud;
- Perceptions and concerns about food fraud;
- Awareness and effectiveness of CFIA communications regarding food fraud; and,
- Awareness and understanding of CFIA transparency regarding food fraud enforcement activities.

Qualitative research results – focus groups with consumers

Overall views on and experiences with food fraud

Defining food fraud

To kick-off the focus groups with consumers, participants were shown the following sentence and asked to provide some examples of what they felt would constitute food fraud.

Food fraud occurs when food is misrepresented.

The topic of product sizes came up often with many mentioning "shrinkflation" (when brands quietly reduce the size of their products but continue to sell them for the same price). Many also discussed how the weight listed on a product package can sometimes be greater than the actual weight of the contents in the package.

Many gave examples of misleading labelling, such as:

- Products that claim to be "natural" or "healthy" but contain several "unhealthy" or artificial ingredients.
- Items labelled as made with real fruit but are actually only made from a small percentage of real fruit in addition to artificial flavours.
- Fish products that are farmed, but do not specify origin on package.
- Meat that is mechanically tenderized but does not say so on package.
- False claims of packaged products (for example, natural health products).

A smaller proportion of participants considered the following food fraud:

- Fruits and vegetables or other products labelled as organic when they are not.
- Dairy, meat or egg products that are labelled as "free-range" when they are not.
- Fish products that are labelled incorrectly (for example, salmon that is actually another type of fish, calamari or mussels that are actually another type of fish or seafood, canned tuna that contains other types of white fish).
- Products being labelled as 100% pure when they actually contain a mix of ingredients or use cheaper or artificial ingredients as filler.

After participants listed examples of what they thought may be classified as food fraud, the moderator specified that food fraud is classified as <u>intentional</u> misrepresentation of food.

Sources of information on food fraud

When asked whether they had seen, heard or read anything about food fraud in the past year, some recalled examples from social media platforms such as Facebook, Instagram, Twitter or Reddit, the news, documentaries as well as friends and family. Some examples included the following:

- Side-by-side images of product packaging before and after “shrinkflation”.
- A Reddit post where someone purchased pancake mix and weighed the contents to find it was smaller than what the packaging listed.
- Olive oil listed as organic when it was not actually, or labelled as pure olive oil when it actually contained a mix of oils.
- Honey that is labeled as pure but has been diluted with cheaper ingredients.
- Maple syrup that when tested, was not 100% maple syrup.
- Salmon from grocery stores that was tested and determined as misrepresented and in reality, was another form of fish.
- Calamari and mussels sold at high price points when they were actually less expensive types of fish being misrepresented.
- Water being added to meat in order to inflate the size.
- Artificial colouring being added to products such as salmon or jam to make them appear more appetizing and attractive to consumers.

For the most part, participants did not actively look for information on food fraud but rather came across news articles or posts on the topic. Only a few said that they searched for more information after learning about examples of food fraud through the news, documentaries or social media.

Level of concern with food fraud

When it comes to purchasing food products from grocery stores, most participants were not overly concerned about encountering food fraud and said this was not something they were actively looking for. With that said, many explained that they were cautious in general when purchasing groceries from a health-perspective or to get good value for their money.

Those who were more concerned with food fraud tended to be those with a food allergy or dietary restriction in their household as well as those who were health conscious. These participants tended to pay closer attention to ingredient lists and nutrition labels to ensure that the products they are buying are suitable for their dietary needs.

When asked which foods they felt were more subject to food fraud, animal products came up the most. Participants typically described skepticism in labels such as “organic”, “natural”, “free-range”, “grass-fed”, “triple A” or “halal” with the reasoning that they would not be able to distinguish if these products actually met these claims. Some had similar concerns regarding “organic” labelling on fruits, vegetables or packaged foods.

Some felt that processed or packaged foods may be subject to food fraud as it would be easier for companies to add cheaper ingredients as a way to save costs and consumers likely would not notice.

A few participants shared that while they have always been skeptical about companies being misleading or dishonest about the quality or ingredients in their products as a way to cut costs, they are slightly more concerned recently due to the economy.

When specifically asked about fish sold in Canada, most said that they trusted that it is for the most part, properly labelled as they had no reason to believe otherwise.

Of those who were less trusting, a handful had heard about fish being mislabelled from the news or other sources which decreased confidence. Others were worried about mislabelling from a sourcing standpoint. For example, some wondered whether a product labelled as wild-caught might actually be farmed, or whether a product labelled as a product of Canada might have actually been caught in another country and simply packaged in Canada.

“I’ve read some articles recently in different news outlets about fish mislabelling. I believe there was a case of it happening at [a grocery store] in Halifax […] some salmon was apparently not salmon. I’ve heard that it is a phenomenon that fish can be misrepresented or mislabelled. I do still eat the fish but I kind of accept that it might not necessarily be what I think it is.” – Female, 30, Nova Scotia

Some felt that fraud would be more likely to occur in packaged fish such as canned tuna or fish sticks, which may use a mix of less expensive fish rather than the type of fish listed on the package and consumers would be less likely to notice the discrepancy.

A majority of participants agreed that the fish sold in Canada is safe to eat, including most of those who were less trusting that fish was labelled correctly. Rather than concerns about food fraud, concerns about safety of fish mainly pertained to its freshness, as many referred to the distance it may travel before it gets to the grocery store. A few also mentioned slight concerns about mercury levels. However, those with concerns explained that they view it more as a quality concern rather than a safety concern and continue to eat fish.

When participants were asked to guess what percentage of fish sold in Canada was accurately labelled, responses typically ranged from 40%-80%, although many admitted that they had not thought about this before, and the topic of discussion made them perceive that fish mislabelling might be a bigger issue than they were aware of. Participants were informed that 92.7% of fish sold in Canada is properly labelled, which many felt was great to hear and would lessen concerns. While most were reassured, a few questioned how this statistic was calculated and what would explain the remaining proportion of fish that is not properly labelled.

“I think it's pretty good. But I do have questions about the other 7%, and what exactly that means and what is being done about it?” – Female, 33, British Columbia

« Ils disent 92 %, mais comment ils ont fait pour vérifier pourquoi ça ne serait pas 100 %? Comment ont-ils fait pour quantifier le 92 %, c’est la question qu’il faut se poser. » – Male, 30, Quebec [« They say 92%, but how did they figure out it wasn't 100%? How did they quantify 92%, that is the question. »]

Participants were generally unsure at what point in the fish supply chain they believed fraud might occur, however some suspected this probably happened at the processing or packaging plants.

Personal experiences with food fraud

Overall, very few participants had personally experienced food fraud. That said, some admitted that they might not know if they had encountered or consumed a product that was fraudulent.

Of the few who felt they had experienced food fraud, the following examples were shared:

- Cereal which contained an ingredient not listed on the box.
- Product weight inconsistent with weight listed on package.
- Product listed as a prepared meal with beef but was mainly comprised of soy protein and a smaller percentage of beef.
- “Lean” ground beef which had a lot of fat after cooking, suspected to not be lean meat.

As a result of suspected food fraud, some participants said they chose not to purchase the product (if they noticed the issue in the store), did not buy the product again, did not consume the product out of concern for potential allergens, returned the product to the store, or emailed the company. None of the participants indicated having reported their concern with a government agency such as the CFIA.

If they were to encounter food fraud in the future, their actions taken would depend on factors such as the severity of the fraud, where they purchased the product, the amount of money they spent on the product, whether there had been any impact on their health, and the quantity of the product they purchased.

Many participants suggested they would return the product to the store they purchased it from to try to get refunded, especially if it was an expensive item. Otherwise, some said they might "cut their losses" if the item was not particularly expensive in order to avoid having to spend time taking the item back or contacting the company. Others would look on the package for a contact number where they could communicate the issue to the supplier/manufacturer directly. A few would search online to see if other people had similar experiences or would discuss the issue with friends and family and, depending on the health consequence or financial toll, they may recommend to others not to buy the brand or product.

If the fraud resulted in a health consequence such as food poisoning or an allergic reaction from an undisclosed ingredient, participants would be much more likely to take action, especially as it could prevent others from getting sick. In these cases, a couple of participants suggested that they may look up the government department that handles these complaints. However, if the encountered food fraud was something such as a minor labelling issue, many would brush it off or take less extreme actions such as contacting the store.

When asked what consequences they would expect if a company was found guilty of food fraud, many would want there to be an investigation to determine if the issue was widespread. Participants would want to see transparency in the process and for the companies responsible to be held accountable through financial penalties and bad press so that Canadians are made aware and can make informed choices on which brands and products to buy in the future. A few suggested that the amount fined should be commensurate with the size of the company, otherwise large companies may not be sufficiently impacted financially and might repeat the offense.

Views on how food fraud is managed in Canada

Participants were asked their opinion on how food fraud is managed in Canada. For the most part, participants felt that it is well managed and that overall, there is a high level of confidence that food in Canada is safe to eat, especially compared to some other countries. This sentiment came from the fact that in most groups, none or very few participants had experienced food fraud, or knew somebody else who had. Additionally, a few mentioned that when food safety issues occurred, as seen through food recalls, actions are quickly taken to inform Canadians and pull these products from shelves, which gave them reassurance.

Most assumed that there is a government agency responsible for managing food safety, however only a few mentioned the CFIA organically. There was some general agreement that there should be more awareness of the topic of food fraud, how the government is managing the issue as well as what to do if you encounter it. Some mentioned that they would be unsure where to report food safety issues or food fraud if they were to encounter it.

A few felt that the way food fraud or food safety in general is managed in Canada is good but could be improved. These participants typically had concerns about the length of time it can take for issues to get caught. A couple mentioned having seen news articles about food companies that were not following regulations, and when they looked into these articles, they found that the investigations had started years prior. For these individuals, this lowered confidence when it comes to how quickly food safety or food fraud issues are identified and then resolved.

Awareness of CFIA's involvement in food fraud

Participants were informed that the CFIA is responsible for regulating food in Canada and verifying that companies are complying with the federal food rules.

While many had heard of the CFIA before, very few had ever thought about contacting the CFIA when they encountered food fraud or a similar food safety issue. Instead, they typically thought of contacting the store or the manufacturer.

As well, many repeated that they did not know much about food fraud in general so they had not thought about who they would contact if they were to encounter it. Those who had not had personal experiences with food fraud also felt they would probably think about contacting the store or contact the company directly rather than contacting the CFIA.

Many were apprehensive about contacting the CFIA regarding food fraud with concerns that it would probably take awhile to get a response, or it might not be worth the effort, especially if it was just a mislabelling issue rather than a food safety concern. There were also various concerns that engaging with a government of Canada agency would be cumbersome and time consuming which in turn would discourage some from considering this reporting avenue. However, if the food fraud was to result in a health consequence, more would consider contacting the CFIA.

> "If it wasn't severe, or health threatening or anything like that, I don't think it's necessary to take it that far. Maybe when it is health threatening, you know this is not just about getting your money back, you don't want this to happen to somebody else, they should take this out of stores. Maybe then you'd be at the point to actually contact them." – Female, 23, Manitoba

Additionally, some said that that they would first contact the store or manufacturer, and if unsatisfied with the response or actions taken, they would then contact the CFIA.

With that said, some felt that it was good to know that the CFIA could be a contact for food fraud concerns, as some explained they would trust a government department or agency to do more to look into the actual issue than the store where the product was sold or the manufacturer. These participants felt that there should be more awareness about the CFIA's role in food safety and food fraud so that consumers know what actions to take if they experience it.

"I think the problem is that it's not something that you really hear that much about. So, you don't really know what the avenue is to do anything about it. Personally, I don't know where I would go to report it, apart from complaining to the store or the company. I don't even know what regulations are around it." – Female, 65, Prince Edward Island

Participants were then shown the following screenshot of the CFIA's online food concern reporting tool:

Very few had seen or heard about this tool before. Of the few who had, some stumbled across it when searching for other food safety related information online, however they did not actually use the tool to report a concern or complaint.

The reporting tool was perceived by participants to be beneficial, however some felt that there should be more awareness about it. It was also suggested that in order to instill confidence in its effectiveness, the CFIA could promote the tool along with how it is being used to conduct investigations and prevent food fraud.

Views on food recalls

When participants were asked how concerned they were with food recalls in general (meaning, whether they were on high alert for recalls or do not pay much attention to them), responses varied from low to high concern.

Of those who were less concerned, many shared that the food items they have purchased in the past had never been recalled. Others shared that their low concern for food recalls came from their perception that quality control and standards were typically quite high. A few also had the impression that many recalls were voluntary and from a place of caution rather than because of a serious health concern.

“The reason why I’m not super worried about it is because generally I feel like a lot of recalls are done out of an abundance of caution, and it’s rare that a large number of people get really sick.” – Female, 33, British Columbia

Those who were moderately concerned with food recalls typically said that they do not actively look for recall notices, however when they happen to come across food recall notices, they will pay attention or see which items were affected.

“If I see something, I'll look into it and make sure I try to, you know, learn what's happening. But I'm not going to be actively looking for it everywhere I go.” – Male, 42, British Columbia

On the other hand, a few who said they were quite concerned with food recalls had purchased items in the past that had been recalled and worried about the health consequences, with a few explaining that they have had food poisoning in the past. A few also said that they will proactively search for food recalls every once in a while.

“I've had food poisoning, and I don't want to ever have it again [...] I pay attention to articles. I'll share them with my family, my mother who's elderly. I'm really aware of produce, and you know, kind of e-coli infiltration. And I'm just always looking. I mean, I'm not like crazy paranoid, but if I see an article I'm following it.” – Female, 34, Prince Edward Island

Finally, some participants shared that their concerns regarding food fraud were mostly related to protecting their children.

“I'll always look over any kind of popular children's product to make sure there's no recalls on that […] I can consume things that might be moderately damaging, and I don't care. But if anything affects my children, I'm far more concerned.” – Male, 37, British Columbia

Participants typically learn of food recalls from the news (some mentioned CTV, Global News website, CBC and CBC’s Marketplace or local newspapers), social media, from signage or information boards in grocery stores, or from friends and family. A handful of participants said they received email alerts. As well, a few mentioned being contacted by a grocery store when a product they purchased had been recalled (Costco was often mentioned in this context).

There was a perception among some that it is harder to get information on recalls than it used to be as many do not watch televised news and either don't have social media, or do not see news-related information on social media anymore.

Only a small number of participants were aware of email alerts prior to the discussion.

"I recently learned about the government of Canada's recall email subscription you can sign up for I learned about when I was at school talking about medical devices that were recalled. And I learned that you can sign up via email and you get a newsletter pretty much every day from the Government of Canada with any products at all that are called food or otherwise. A lot of times. It's auto parts and cars. But I do often read them to be aware of things that might affect me like food." - Female, 30, Nova Scotia

When specifically asked about this type of notification, interest in a subscription service to receive recall email notifications from an agency like CFIA was quite high. A few would like to be able to customize the notifications, perhaps by region, by type of recall or by food category. A preference for notifications via a mobile app was also expressed in one session.

"If it affects only like a small postal code in, you know part of Canada, then perhaps you shouldn't go out to all the subscribers. […] Then you get like notification fatigue […] you're probably not going to give that service too much attention. […] I have Apple News and all the important notifications and stuff get filtered to me every day, and I enjoy reading Apple News anyway because it has all the sources. I feel like that would be the more optimal way of notifying." - Male, 39, Alberta

« J'allais dire les courriels. J'en reçois une tonne par jour, donc je n'arrive jamais à les lire tous. Mais si c'est une application qui m'envoie les notifications, je serai plus porté vers une application qui utilise les courriels. » – Male, 46, Quebec [« I was about to say emails. I receive tons of them each day, but I don't have the time to read them all. But if I receive notifications through an app, I would more likely be interested by one that uses emails. »]

Reactions to CFIA messaging regarding food fraud

Reactions to a social media post concept

In order to gain feedback on CFIA messaging regarding food fraud, the following social media post was tested with participants. Participants were informed that for legal reasons, the post could not name the company that was being discussed.

Canadian Food Inspection Agency

2d ·

Taking Action Against Food Fraud

A CFIA investigation revealed a company was misrepresenting imported greenhouse vegetables, including tomatoes, peppers and cucumbers as a Product of Canada to retail stores over a 15 month time frame.

The company was charged, and were ordered by the court to pay fines totalling $1,500,000 and sentenced to a three-year probation period.

This is an example of how CFIA inspectors work to verify that industry is operating in compliance with Canadian standards and regulations so that consumers can be confident that the food they buy is accurately represented and safe.

We take mislabeling seriously as it is deceptive to consumers, impacts consumer trust, and creates an unequal playing field for the industry. https://bit.ly/12345

31 · 7 comments · 45 shares

Like · Comment · Share

Some participants felt that this post was good as it could help raise awareness of the topic of food fraud and remind Canadians that the CFIA is doing investigations and holding companies accountable. For a few, this type of post would provide a sense of trust in the CFIA.

A few gave neutral feedback citing that they would probably scroll past this post if they saw it on social media as it does not really affect them or because they don’t feel that the misrepresentation in this case was that big of a deal.

Other feedback was more critical. A large number of participants voiced concerns about the fact that the company could not legally be named. Many felt that by not revealing the company, the post was useless as it does not allow Canadians to make informed decisions about their purchases by avoiding the brand in the question and may instead instill more fear when consumers buy food in the category referenced in the post. Some also felt that if the company were named, it would hold that, and probably other companies, more accountable to follow regulations in the future.

> “In the absence of a name, It's more fear mongering than anything. I think it’s going to keep people from buying peppers, tomatoes, and cucumbers. Not knowing who the guilty

party was, you may assume that it's the one at your local grocery store." – Female, 41, Newfoundland and Labrador

A few questioned the 15-month timeline and felt that knowing the investigation took this long did not provide much reassurance.

After reading the post, many were unclear about how the company misrepresented the fruits and vegetables and felt that more information could be included. It was also suggested that the post should include more information such as which regions and stores the affected items were sold in. Additionally, some would like to see a clear call to action and reference to a link where they could click to learn more. A link to learn more about food fraud in general or how to report suspected food fraud to the CFIA would also help improve the relevance or usefulness of this type of post.

Reactions to CFIA messaging

Participants were also asked to provide feedback on the following series of statements which the CFIA could use in some of its communications with Canadians:

- Each day, CFIA inspectors work to verify that industry is operating in compliance with Canadian requirements.
- Inspections are targeted in areas of highest risk, including those most at risk for not meeting Canadian standards and regulations.
- This is done all along the supply chain and involves numerous stakeholders and jurisdictions.
- When non-compliance is found, the CFIA takes enforcement action to protect Canadians.
- Consumers can be confident that the food they buy is accurately represented and safe.

Overall, many felt that these statements were reassuring and alleviated some concerns and worries they had.

"I would say that this is reassuring to read this. It gives you a little bit more peace of mind to know that this is happening behind the scenes." – Female, 48, Ontario

Some commented that it was nice to hear about how the process works, although others would like to see more information about the process, for example how often investigations occur, especially as many were unaware about the CFIA and their scope of work. Additionally, some were not sure what was meant by "areas of highest risk," some doubted the validity of the statements on the grounds that not everything can be inspected, and some just wanted to better understand what the regulations are in general.

Many agreed that the first four statements made the fifth statement more believable. Some felt that the statements provided awareness in a straightforward manner. However, others saw them as vague and said they would need to see statistics or facts such as how many cases of food fraud they have caught in the past year and how quickly these investigations were completed in order to find them believable or reassuring.

Overall views on and experiences with “best before” dates

An important research objective was to better understand Canadians’ views and use of “best before” dates.

Many were confident that they understood the difference between an expiration date and a “best before” date on food products. These participants generally described a “best before” date as a guideline for freshness and quality whereas they viewed expiration dates as more of a firm cutoff for when food is no longer safe to consume.

> “Best before, as far as I understand, is that just the food quality has deteriorated. […] For example, nutritional value and things like that, but they're still safe to consume. Whereas expiration is, it's no longer safe to consume. I think that's the difference.” – Male, 37, Saskatchewan

A few admitted that they were less confident in the difference between these two dates with some explaining that they generally assume something is no longer good if it is passed its “best before” date and will throw it away.

To make sure all participants were on the same page, the following definitions were shown:

An **expiration date** is the last day a food can safely be consumed.

- Once it expires, it should no longer be eaten because of changes in its nutrition or composition.
- Expiry dates are required on only a small number of specific foods, such as infant formula and meal replacements.

“Best before” dates are about food freshness, quality and how long they should last unopened, not about food safety.

- Food can still be “good” and eaten even if it’s not at its “best”.
- “Best before” dates only apply to unopened products if stored properly.
- Once opened, their shelf life may change, and consumers can use their judgement when deciding whether a food can be eaten.

After hearing these definitions, some admitted that they did not realize the difference between these dates.

Most pay attention to “best before” dates at the grocery store, particularly when it comes to certain items. Participants are typically more alert when it comes to items such as meat or dairy products (particularly milk) as opposed to frozen food products, canned goods, or dried items such as pasta noodles and other shelf-stable items such as crackers.

Those who paid the most attention to “best before” dates in the grocery store explained that they had purchased food in the past that was past its “best before” date without realizing it. Several also suggested that their alertness had more to do with not wanting to spend money on items close to their “best before” date so that it will stay fresh for longer once they bring it home rather than because of food safety concerns. A few mentioned that they will often buy items that have been marked down in price due to being close to the “best before” date because their grocery budget has become increasingly tight and/or because they plan to freeze the item or use it up quickly anyways.

Most participants were more lenient on best “before dates” when it comes to food products in their home, especially pantry items. However, they remain cautious with certain items such as meat, fish and milk. Many perceived items such as yogurt and cheese to be quite safe to consume past their “best before” dates. These participants explained that they will check for signs of spoilage by looking for mould, curdling or smell the item to determine freshness and decide whether they should consume it. As well, sometimes participants will search online to try to determine how long a particular item can safely be consumed.

A few were stricter with “best before” dates (particularly for perishable foods) and said they, or their spouse, tended to treat them as firm dates beyond which the food is not consumed at all. These participants will try to use food items or freeze them before their “best before” date, otherwise they will dispose of an item that is past the date.

When the topic of removing “best before” dates from food items was probed, most were opposed. Participants generally felt that even though “best before” dates should not necessarily be used as a firm date, they are still beneficial as a guideline or “safety net”, especially when it comes to items such as meat, fish and dairy products. Participants would be less concerned about the removal of “best before” dates on items such as spices or non-perishable items.

There were concerns that items might sit on the shelves at stores for long periods of time, especially as many habitually grab items from the back and thus, it would be difficult to know if an item has already spoiled before purchasing it. When participants were probed about the manufacturer dates on items, some were less concerned however others felt that they would be unsure how long products typically last after being manufactured and this would create more confusion.

"I wouldn't like that. I still need the best before day, because [removing it] requires me to do research and Google and figure out how long are the eggs good for? And I don't really want to be doing that." – Female, 36, British Columbia

While several felt that removing "best before" dates would likely reduce food waste, they suggested that instead there should be more awareness on the difference between an expiry date and "best before" date so that consumers would be encouraged to inspect items that are past their "best before" date rather than just throwing them out.

Sources for information on food

As a final topic of discussion, participants were asked where they typically get information on food in general, including nutrition, recipes, or food safety.

Rather than relying on specific websites or sources, many use Google as a way to search for the information they need at the time. For example, some use Google to search how long a certain food is safe to eat, to get reviews on a certain food product or brand or for a recipe. From Google, they may be directed to certain websites or blogs that are not typically bookmarked or remembered.

Many, especially those in the young adult groups, use social media as a source of information on food, especially for recipes. Most of these participants suggested that they do not have specific accounts they follow or visit regularly, but instead they will see posts show up on Instagram, Facebook, Pinterest or TikTok or their friends will send them posts on these platforms. A few said they follow specific accounts such as food or recipe pages as well as fitness influencers that post recipes for healthy or high protein meals. Specific blogs, social media accounts, apps or websites included: "Tasty", "Allrecipes", "Yummly", "What's cooking?", "Maangchi", "FoodPharmer", "Pro Home Cooks", "Cassandra Loignon", "Feel Good Foodie", "alexcook", "Ricardo", "Au pied de cochon", "Qu'est-ce qui mijote?", "On mange quoi ce soir?", "Uncle Roger", and Loblaws/PC Optimum.

Cookbooks were also used by some participants with some mentioning having books for certain dietary restrictions, such as diabetes-friendly recipes.

Several got information about food or recipes from friends or family members. A few also mentioned having consulted with a dietician in the past. Additionally, a couple referenced government websites or tools such as the Canada's Food Guide.

Qualitative research results – focus groups with food businesses

General attitudes towards and awareness of food regulation and compliance

Perceptions of Canada's approach to food regulation

As a warm-up question, participants were asked to generally describe Canada's approach to food regulation.

For the most part, food regulation in Canada was described as strict but fair, offering solid consumer protection. From a business perspective, some felt it was somewhat demanding, especially when it came to paperwork and labelling. As well, a number of participants spoke of regulations being difficult to understand or implement for new businesses in particular. Compared to other countries, it was said that Canada was perhaps over-regulated; some felt this was the right thing to do, while others were a bit less positive.

There were also some discussions of CFIA's role and particularly how businesses interacted with the CFIA when it comes to regulations and inspections. While some said the CFIA (through inspectors, mainly) was easy to get in touch with, others said that it was not always easy to get the answers they were looking for regarding regulations. Some also felt that even when given answers, they did not feel that the CFIA was "on their team" or specific enough with their guidance to help them solve an issue.

Outcome-based regulations

Familiarity with the term "outcome-based regulations" was quite low. However, even when not familiar with the term, when prompted many participants could guess more or less accurately the main premise of what was meant by the term.

> "They only think of what they want from the regulation instead of following a specific process. That is what outcome-based regulation is." – food importer/exporter, Ontario

Overall, many felt that from a business perspective, this could sometimes make things difficult, since it could be trial-and-error when trying to either start a new business, when trying to comply with new regulations or when fixing issues of non-compliance. Participants from smaller businesses in particular said this could be a challenge, since they did not have dedicated staff to deal with regulations and it often meant that they would be quite thinly spread, would have to quickly investigate and learn a lot about something that was not their specialty, or would have to spend a lot of money on consultants to help them out.

Some spoke specifically of large investments being made in machinery or processes, only to be told later that they did not comply, or of difficulty starting up a business because it was not immediately clear what was required. Recalling for example when they started their businesses, some small business owners said that it would have been easier with more "how to" supports from the CFIA, both in terms of set-up as well as regarding the development of processes and procedures. In those cases, more prescriptive regulations (for example in the form of guidance, tools or checklists) were often desired by these participants.

On the other hand, there were also those who said it made sense to be less prescriptive but to put the onus on industry to understand their own processes and how they can best comply with regulations, especially for those who had been in the industry for a long time. It was also said to signal respect for industry and an acknowledgement that professionals in their various industries would know well (or best) how to achieve outcomes, and that the regulator is open to listening, learning and work together in a collaborative way.

There was some agreement that if food products are safe, they by definition meet regulatory requirements. On the other hand, some countered that there was more to meeting requirements than only food safety, such as for example labeling and administrative requirements (for example regarding traceability). There was also some discussion in a few groups about where the bar of "safe" is or should be set, for example whether this means that it is just not making consumers sick, or that it should meet a certain "healthiness" test, or whether it could potentially be unhealthy / unsafe to some but not for most consumers.

Safe Food for Canadians Regulations (SFCR)

Familiarity with SFCR

Not everyone was familiar with the fact that the CFIA's regulations were called the Safe Food for Canadians Regulations (SFCR). Familiarity with these regulations was noticeably higher among participants whose main role was food safety and/or quality control and lower among businesses whose primary activity is retail. Among those who were familiar with the SFCR, most recognized that these regulations are outcome-based although, as noted above, not everyone agreed that they should be.

When asked about key safety requirements in the SFCR, a few participants could name specific elements of it, such as traceability, pest control, building and/or equipment maintenance, other preventive controls, licensing, hazards planning, labeling, and packaging. When listed, many were familiar with these elements, but they often referred to their own specific procedures and standards (i.e. the temperatures of their fridges, certain logs that need to be kept, cleaning standards they upheld, periodic machine testing, freshness of produce, mandatory label information for their products, having to pasteurize milk, etc.) rather than to the larger umbrella terms or regulations they might fall under. In some groups, there was also some confusion about which level of government or which government agency was in charge of certain regulations.

In terms of how easy or difficult it is for their business to comply with food regulations in Canada, for the most part participants said it is relatively easy, or at least not overly difficult, to do. As well, there were some discussions about industry generally understanding the importance of regulations and of them wanting to do what's best for consumers and wanting to have high standards, no matter what. In some cases, participants say they exceed the CFIA standards because they feel those are the minimum requirements and they want to do better, or because they adhere to other (often international) certifications or standards that are stricter than what is required in Canada.

In terms of compliance challenges, specific points were raised around interactions with the CFIA. More specifically, participants would refer to issues working with or contacting CFIA, for example not getting answers as quickly as they had hoped, getting conflicting opinions or advice depending on who at CFIA they spoke to, feeling vulnerable or unsure as a business when trying to comply or even knowing if they are on the right path to compliance, or unclarity about expectations more generally.

Other types of compliance challenges raised in these groups included:

- not always knowing whether or not suppliers closely followed regulations,
- trying to figure out and comply with inter-provincial trade regulations,
- labelling (for example bilingualism requirements),
- expiry dates (a lot of food ending up going to the foodbank when it's "expired" but still good for consumption),
- small companies being over-burdened by paperwork,
- some traceability or quality control struggles, for example when importing products.

Participants in the livestock industry mentioned very specific examples, including difficulties trying to tag young cows, tags being ripped out, as well as abattoirs and auction houses having exceedingly strict regulations, making these services less available.

Participants were also asked what explains their successes in complying with food regulations. Many businesses explained that Canadian products are held to high standards and are counted among the best in the world, which in turn opens up a lot of international markets for them. Traceability and detailed record-keeping by them as well as by all parts of the supply chain were also said to help them meet regulations. These records help determine that if the end consumer has an issue, where in the supply chain the issue may have taken place, potentially protecting them if it's clear in their documents that they followed all the rules and regulations. It was also explained that accurate record-keeping contributes to swift and accurate recalls. Some also attribute some of their success in complying to their good relationship with the CFIA in general and also to inspectors being helpful and going above and beyond, for example by being available to bounce ideas off and give their opinions at various stages of a process. Others mentioned that they were sent links by the CFIA to documents or specific regulations they were looking for.

There was also some sense that a lot of the regulations are the same as, or promote what in their minds, in the end, is "just smart business."

"Because of the regulations that we follow, we're just a bit more strict. But at the end of the day, we're sending out quality product. And that's just part of the job." – food importer/exporter and manufacturer, British Columbia

In summary, while in the end, everyone was confident that they could properly incorporate the CFIA's regulations, since this is a requirement of being and staying in business in Canada, it was not unanimous that SFCR's (outcome-based) regulations are the easiest or most effective for all businesses, given some of the challenges they may have faced.

CFIA's role in food safety regulation

Participants were asked to describe in their own words the CFIA's role. For the most part, CFIA's role is generally understood to be that of regulator for the Canadian food industry, and to ensure the safety of the food Canadians eat. It was also mentioned that one of its roles is to ensure that uniform standards are met across the country and throughout the whole supply chain. It was described as "somewhere between a policeman and a referee." Consumer protection was also a term that came up in the context of the CFIA's role.

"I think it's to keep businesses and consumers safe and ensure that businesses are doing good practice to keep the consumer safe." – food retailer, Alberta

« En règle générale, c'est de protéger les Canadiens et les Canadiennes, les garder les plus sécures en termes de salubrité. Sa mission et son rôle, c'est justement de s'assurer que toutes les entreprises respectent la réglementation qui est émise par le gouvernement. » – wholesale distributor, Quebec [« Generally, it is to protect Canadiens, keep them safe in terms of food safety. It's mission is to make sure that businesses follow the government-issued regulation. »]

In terms of helping businesses comply with food regulations in Canada, those who felt that the CFIA had in fact been helpful to them in the past considered the CFIA a partner. These participants often spoke about the education aspect – the CFIA (often inspectors, supervisors or a regional representative with whom they have a relationship) helping them to find information or directly sending them information they required regarding the regulations, often particularly when starting their business. And while some felt the bureaucracy was too rigorous in some respects, there were also those who said that the CFIA is willing to work with industry and shows a good level of flexibility in certain areas, particularly when it comes to new developments (for example about integrating AI into a business).

Some other specific examples of the CFIA helping out a business included them more closely scrutinizing, and in some cases, switching suppliers after the CFIA had pointed out shortcomings.

“Best before” dates

Opinions about “best before” dates generally reflect that they serve an important role in food safety where they are required. While this important role was most often seen from a consumer safety perspective, upon probing, some also said it was important for their business. However, for the most part this was not very top-of-mind from a business perspective.

When participants said it played some role in their business, the most-often mentioned context was for inventory control. They spoke about their business’ “first in/first out” rules in this situation, or of asking their suppliers for a certain shelf life of their deliveries based on their best-before dates, so that they know they have enough time to process it. They were also seen as going a long way to protect businesses, for example against consumer complaints. It also makes some feel like it represents their “warrantee” or promise to their customers, that their product will still be fresh or good for consumption until that date, acting in a way as a quality control stamp (rather than only a food safety measure).

A few participants had thought of the connection between “best before” dates and food waste, although this was mainly from a consumer perspective rather than from a business perspective.

From a business perspective, a few participants gave examples of this connection. One example given was that of their business receiving products that they use in processing that had shorter shelf-life than usual (based on a “best before” date), that could lead to food waste if they were not able to use it soon enough. Another example was the need to buy a certain product in large quantities, of which a large proportion had to be thrown out in the end because they couldn’t process it all. This product was something that they did not feel would spoil at all, and that they could have continued to use safely or perform tests on to ensure safety much past its stated “best before” date. A few other participants who sold specific products that they felt actually have a longer shelf life than the “best before” date would suggest, such as certain beverages, said that there would be less waste in their business without “best before” dates on their products.

Some say that as consumers, they don’t necessarily always abide by them, or that it depends on the product. However, there is a general sense that they are important for consumers as well as for businesses, and that doing away with them would lead to, at best, confusion, and, at worse, consumer safety being compromised. Again, it was also brought up that “best before” dates are important for liability purposes, and that without them, businesses could more easily get in trouble (or be asked for refunds, etc.) if consumers get sick when eating bad food. There was also some sense that removing “best before” dates just “didn’t feel right” for businesses, perhaps sensing that this might make them appear less trustworthy in the eyes of consumers. Some were also concerned about what it would generally mean for quality control and safety standards of food in Canada.

“I wouldn't say there'd be more food waste, but there'd be probably a lot more sick people.” – food manufacturer, Alberta

“No, we need to have it on there just to have a guideline that we guarantee good quality before that day. And if you go over it - at your own risk, but don't come back to me.” – food importer/exporter, Alberta

Food fraud

In order to level-set common understanding, food fraud was explained to participants first, as follows:

Food fraud may occur when food is misrepresented. It can pose serious health risks if, for example, unidentified allergens or hazardous materials are added to food products. It can also have an economic impact on the buyer (for example, paying for a product that is actually of lower quality).

There are 4 main types of food fraud:

- Substituting
- Adulterating or diluting
- Mislabelling
- Making false claims or misleading statements

Very few participants had directly experienced or been impacted by food fraud, and even fewer had received a consumer complaint about food fraud. A few indicated they may have observed it or have suspected it in the past. For example, a participant said they were not sure that claims of a product being organic were always true, verified or properly certified. Some also mentioned honey from other countries being misrepresented or adulterated, which puts pressure on the entire industry, including in Canada. An instance of misrepresentation of a type of wheat was also brought up which ended up indirectly having an impact on their business since it cast a shadow on the entire food category.

Hypothetically, if they would have been accused of or found to have committed food fraud, participants generally said they would get to the bottom of it and rectify it as soon as they could, first by investigating their own processes and procedures, and then by moving back through the supply chain and ask questions to find the root cause.

Preventative controls to avoid food fraud they have in place for the most part include what participants call their standard quality control procedures, for example weighing products, checking them visually or otherwise, and carefully checking the labels of anything they use to make their end products. Some also conduct random testing on products they receive from their suppliers.

However, for many participants it was difficult to pin-point specific controls they have in place to prevent being impacted by food fraud specifically. Those who use suppliers of raw materials often explain how these are solid, trusting relationships and that they carefully vet new suppliers, and get to know them. Many also ensure their suppliers have needed certifications and proper traceability procedures in place. These relationships go a long way towards feeling confident that they are not using or (re-)selling any products that are susceptible to food fraud. As well, there is generally a strong level of trust in the Canadian food safety regulatory system, which leads to businesses trusting that if products have made it to them through this system, it is meeting the standard and they can in turn trust what's on the label.

Participants were asked whether they would report suspected food fraud in their industry to the CFIA. Responses were mixed, with some saying they would not, and others saying they might, but most likely only after having gone down other paths first. This could include speaking to the company they suspected directly or going through an industry association to report it first. Some participants mentioned that they would be more likely to report it if it could be done anonymously. It was also mentioned that it would depend on the "level of proof" they had. The primary motivation for wanting to report suspected fraud is if the fraud results in a competitive advantage for the accused. As well, there was concern for repercussions on the entire food category or industry vertical if fraud is not appropriately addressed – how one "bad apple" can spoil the image or reputation of all other apples.

Many participants agreed with the CFIA publishing more information about misrepresented products identified through inspection activities. They felt that the type of information published should include details of what rules were broken, how it happened, what the impact on consumers or food safety was, and how it was detected. Most participants felt that in order to be fully transparent, publishing the product name, brand name and/or company name that was found to have committed food fraud should be part of the information made public.

However, some said that this was their perspective as a consumer, but that from a business perspective, they felt that the CFIA should carefully weigh the impacts this could have on a company, and that this should only be made public if repeated warnings were not heeded or if food fraud was a trend or an ongoing issue with a brand or company. There also had to be solid proof of who perpetrated it and that it was purposeful, systemic or malicious, and not the result of accidental human error, one bad actor in a company or a simple one-time oversight. Some also mentioned that the CFIA should also be transparent when it comes to companies rectifying the problem and close the loop by publishing that information as well.

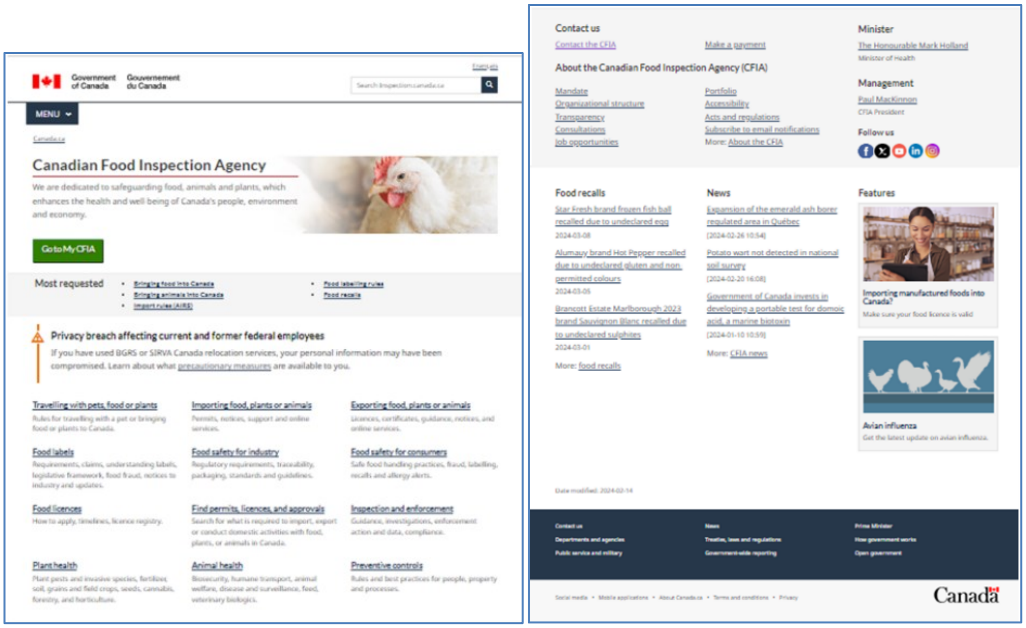
Among participants who sell fish or seafood products, there is also a high level of confidence that that the fish and seafood products they sell are properly labelled for the type of fish when it comes to the common name. While there were a few participants who described substituting happening in the business, most commonly in other countries or with imports, they also noted that there are typically good checks in Canada. If food fraud were to happen in this category, some assumed that it would be perpetrated at or close to the source, i.e., on the boat or shortly thereafter (at the broker level), some assumed it was happening before the product is imported into Canada, whereas others believe the fraud would be committed at the store level.

CFIA tools

A variety of CFIA virtual tools were shown to participants in order explore familiarity and collect feedback.

CFIA website

First, participants were shown the main page of the CFIA website and then asked if they had visited the website in the last couple of years. Across the groups, several had used the website when looking for information related to their business.



Of those who had used the website, feedback was mostly positive. These participants were generally able to find what they needed on the website. Some commented on the ease of finding information through the menu options. When asked to provide other feedback, some suggested that recall information could be more noticeable and some also suggested that the CFIA could offer more resources which business owners or managers could use to show employees.

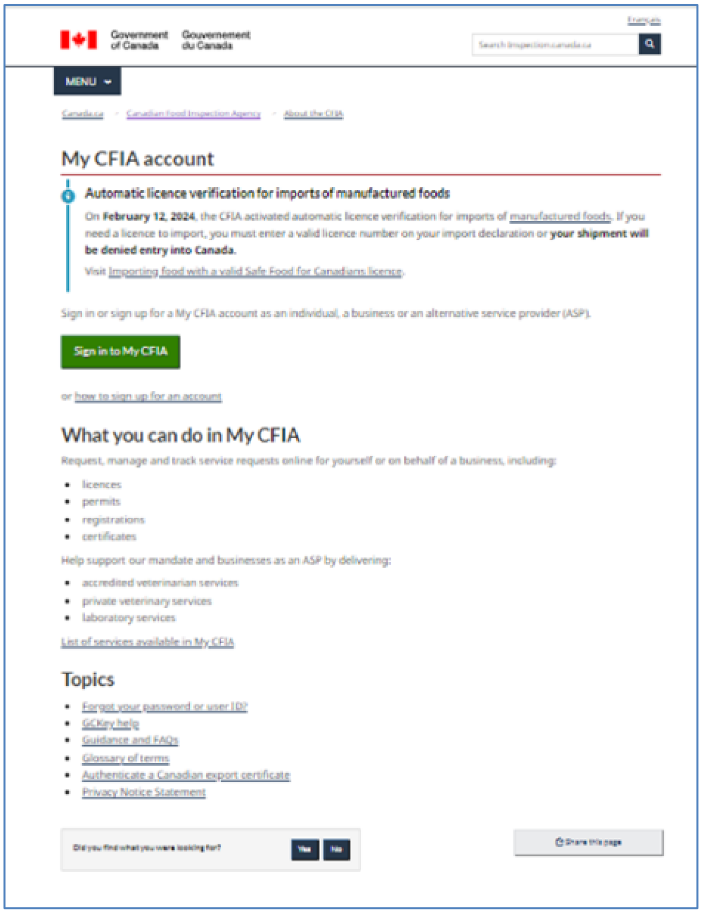
When asked about the virtual assistant function, participants were not familiar with this option and were unable to offer feedback.

My CFIA

Only a few participants had used My CFIA in the past and awareness of the service was generally quite low among the others.

Some participants mentioned that other people within their business have an account, however they have not personally used the service. As well, a few were aware of the service but had not used it as they explained that they have not needed to since their province handles licensing.

Of the few who had used this service, most felt it was user-friendly and convenient when they needed to renew or amend a licence. A couple felt that it was challenging to figure out at first, but became easier and that when they had questions, CFIA employees were helpful.



Français
Government of Canada
Gouvernement du Canada
Search inspection.canada.ca
MENU
Canada.ca
Canadian Food Inspection Agency
About the CFIA
My CFIA account
Automatic licence verification for imports of manufactured foods
On February 12, 2024, the CFIA activated automatic licence verification for imports of manufactured foods. If you need a licence to import, you must enter a valid licence number on your import declaration or your shipment will be denied entry into Canada.
Visit Importing food with a valid Safe Food for Canadians licence.
Sign in or sign up for a My CFIA account as an individual, a business or an alternative service provider (ASP).
Sign in to My CFIA
or how to sign up for an account
What you can do in My CFIA
Request, manage and track service requests online for yourself or on behalf of a business, including:
licences
permits
registrations
certificates
Help support our mandate and businesses as an ASP by delivering:
accredited veterinarian services
private veterinary services
laboratory services
List of services available in My CFIA
Topics
Forgot your password or user ID?
GCKey help
Guidance and FAQs
Glossary of terms
Authenticate a Canadian export certificate
Privacy Notice Statement
Did you find what you were looking for?
Yes
No
Share this page

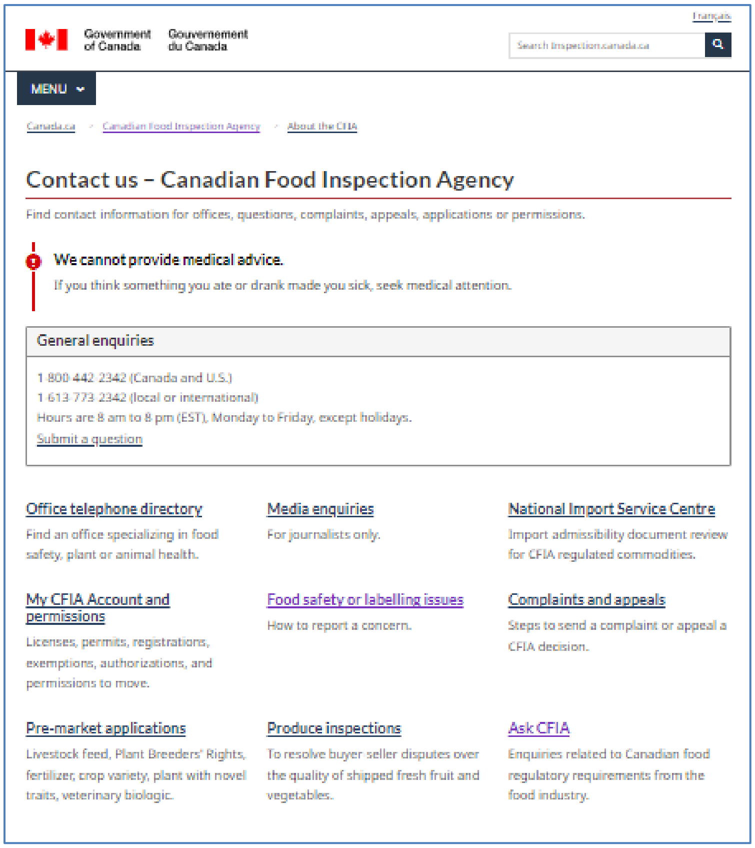
Ask CFIA

Participants were asked whether they had ever reached out to the CFIA through the website. A handful of participants had, however several explained that their business has a contact or inspector that they will contact instead if they have questions.

A few explained that they came across the "contact us" page before reaching out to the CFIA with questions.

Typically, those who had contacted the CFIA, regardless of how they did so, felt that the information they received was helpful and specific.

Very few were aware of the Ask CFIA service, although a couple said it looked familiar and that they think they may have used it in the past to ask questions.



Effectiveness of SFCR communications

Few participants received communications or recalled receiving such communications directly from CFIA. For the most part, communications about regulations came from third parties such as newsletters from industry associations or informal communications with others within their industry.

Receiving information from industry associations seemed to be a preference for some who felt that communication coming directly from the CFIA may get lost, or likely would not be very tailored to them. There would be interest in receiving more communications from the CFIA if it could be divided by industry so that businesses can look for the relevant information.

When asked how communications could be improved, some discussed improvements from a consumer perspective, such as increasing awareness about what the CFIA does to protect food safety in order to instil trust among consumers.

Some liked the idea of having a contact at the CFIA that they can quickly reach out to for information as needed. Similarly, a few felt that the business relationship with the CFIA should feel more like a partnership where the business can work together with their CFIA contact along the way rather than the relationship being more unilateral.

> "It would be great to have that support where you can have that designated person that you built that relationship with. You reach out and you can call in and feel like you're getting really trusted information and not need to be cautious about what to share. […] Just to really feel like it's a partnership, and it's not policing or punishment. But it's more on the educational side." – food importer/exporter and manufacturer, Ontario

It was also suggested that there is a lack of bilingual services and support in regions where French is a minority language.

Quantitative research results – food safety consumer survey

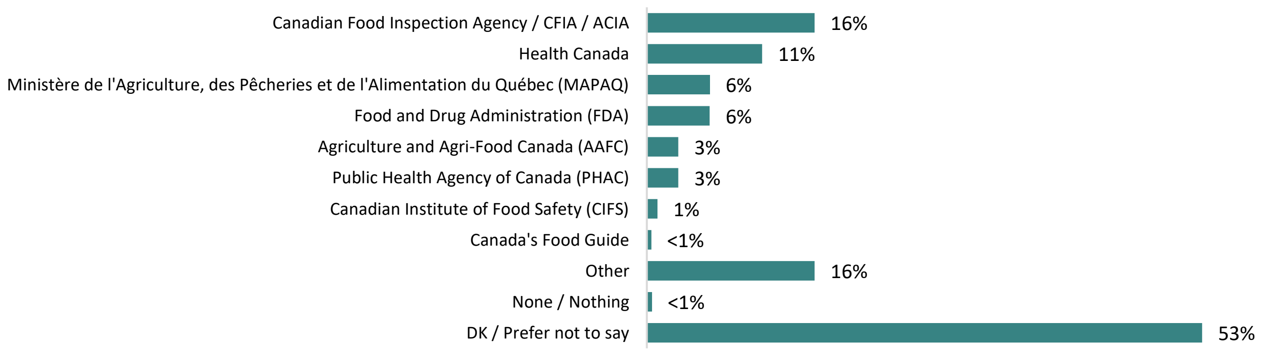
Familiarity with the CFIA

Without being provided with a list of options, participants were asked which organizations come to mind when they think of food safety.

Over half of respondents were unsure of any organizations in Canada that are dedicated to food safety (53%).

More than 1 in 10 respondents, unprompted, thought of the CFIA as an organization in Canada that is dedicated to food safety (16%). Other organizations that were mentioned unprompted included Health Canada (11%), Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec (6%), the Food and Drug Administration (6%), Agriculture and Agri-Food Canada (3%), Public Health Agency of Canada (3%), Canadian Institute of Food Safety (1%) and Canada's Food Guide (<1%).

Figure 1. Unprompted awareness of Canadian food safety organizations



QF1. When you think of organizations in Canada that are dedicated to food safety, which organizations come to mind? Base: All respondents, n=1,503.

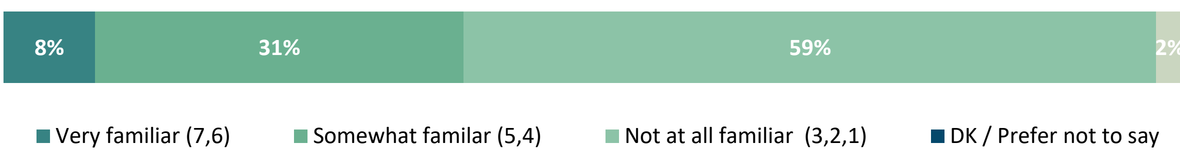
Key segments

Across sub-segments, those more likely to mention the CFIA unprompted when thinking of organizations in Canada that are dedicated to food safety included the following:

- Those aged 35-54 (19%) and those aged 55 and older (17%) compared to those aged 18-34 (11%)
- Respondents with a household income of $40k-$80k (18%) or a household income of more than $80k (19%) compared to those with a household income of under $40k (10%)
- Respondents with a university education compared to those who have completed high school or less (20% versus 12%)

Roughly 3 in 5 respondents (59%) were not familiar with the activities of the CFIA while nearly a third (31%) were somewhat familiar. A smaller proportion reported being very familiar with the activities of the CFIA (8%).

Figure 2. Familiarity with CFIA



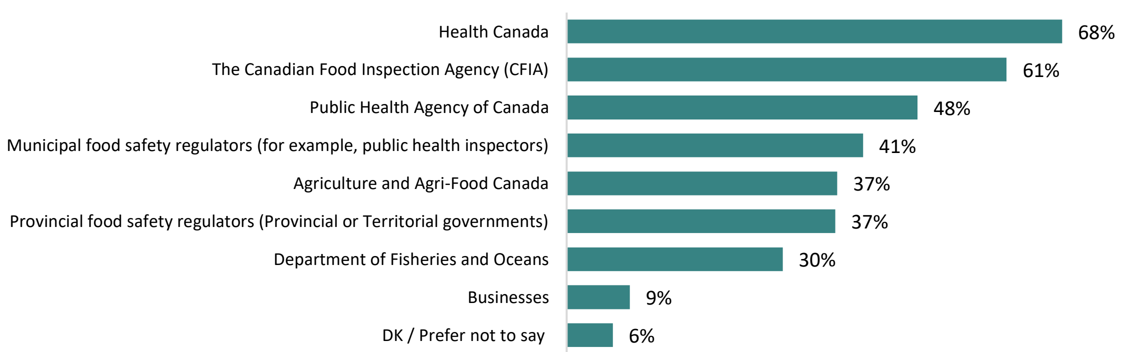
QF2. How familiar would you say you are with the activities of the Canadian Food and Inspection Agency (CFIA)? Base: All respondents, n=1,503.

Key segments

Those who had a great deal of concern with food fraud were more likely to be very familiar with the activities of the CFIA (14%).

When provided a list of organizations and asked which ones they think of when it comes to food safety in Canada, the most common organization selected was Health Canada (68%) followed by the Canadian Food Inspection Agency (61%) and then the Public Health Agency of Canada (48%). Closer to 2 in 5 selected municipal food safety regulators (41%), Agriculture and Agri-food Canada (37%), and provincial food safety regulators (37%), while 30% selected the Department of Fisheries and Oceans and 9% selected businesses.

Figure 3. Prompted awareness of food safety organizations



QF3. When thinking of organizations that are dedicated to food safety, which of the following come to mind? Base: All respondents, n=1,503.

Key segments

Across sub-segments, those more likely to select the CFIA included the following:

- Those aged 35 and older compared to those aged 18-34 (67% versus 43%)

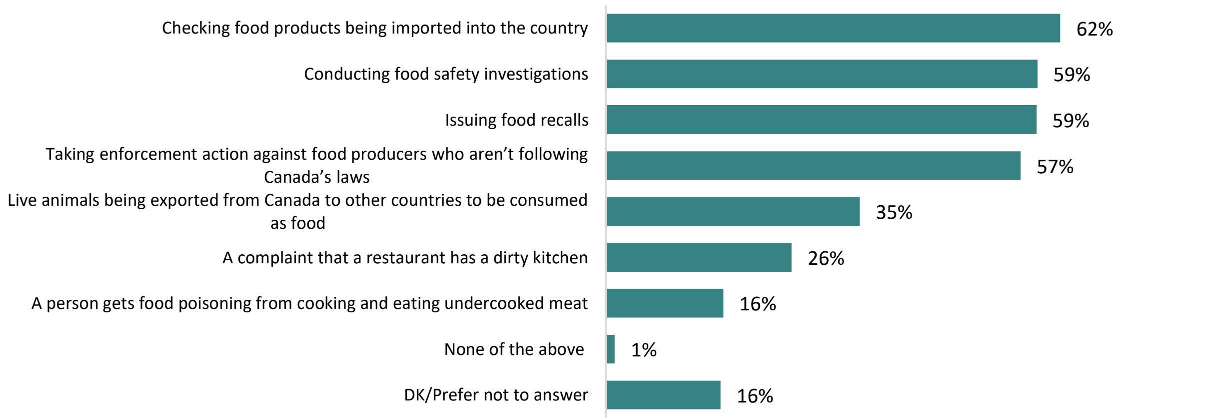
- Respondents who did not identify as a visible minority compared to those who did (63% versus 54%)

When presented with a list of food safety related roles, more than 3 in 5 respondents believed that the CFIA was involved in checking food products being imported into the country (62%). A similar proportion believed they were involved in conducting food safety investigations (59%), issuing food recalls (59%), and taking enforcement action against food producers who aren't following Canada's laws (57%).

More than two thirds of respondents believed that the CFIA is involved when it comes to live animals being exported from Canada to other countries to be consumed as food (35%). Fewer believed that the CFIA handles complaints that a restaurant has a dirty kitchen (26%) or when a person gets food poisoning from cooking and eating undercooked meat (16%).

Overall, 16% were unsure of the CFIA's involvement across these situations while few felt that the CFIA was not involved in any of these situations (1%).

Figure 4. Perceptions of food safety roles involving the CFIA



QF4. From the following list, indicate which of the following situations you believe the CFIA is involved in? Base: All respondents, n=1,503.

Key segments

Across sub-segments, the following differences were found:

- Respondents from Atlantic Canada were more likely than those from other regions to believe that the CFIA was involved in complaints that a restaurant has a dirty kitchen (40% versus 25%).
- Those aged 55 or older were more likely to believe that the CFIA is involved in the following situations compared to those aged 54 or younger:
    - Checking food products being imported into the country (73% versus 55%)

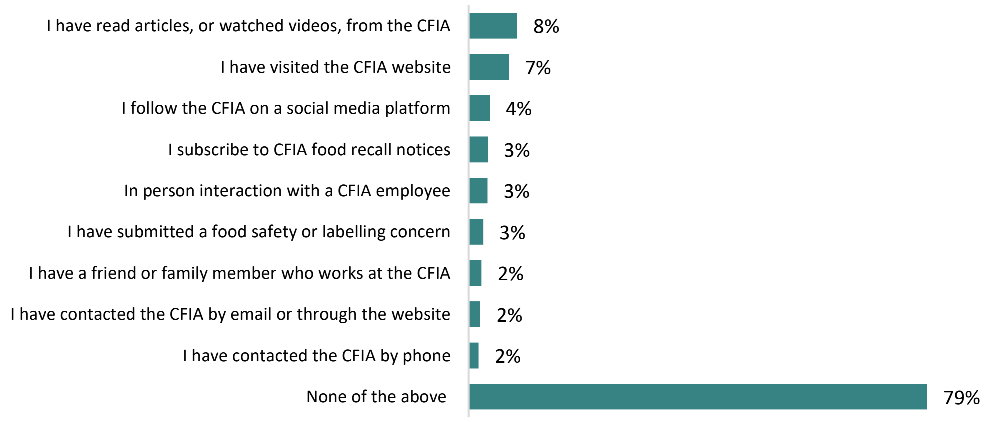
- Conducting food safety investigations (67% versus 54%)
    - Issuing food recalls (68% versus 53%)
    - Taking enforcement action against food producers who aren't following Canada's laws (63% versus 53%)
- Those aged 55 or older were more likely than those aged 18-34 to believe that the CFIA was involved with live animals being exported from Canada to other countries to be consumed as food (39% versus 31%).

Contact with the CFIA

Most respondents had not had any interactions with the CFIA (79%).

Nearly 1 in 10 had read articles or watched videos from the CFIA (8%) or visited the CFIA website (7%). Fewer had followed the CFIA on social media (4%), subscribed to CFIA food recall notices (3%), had an in-person interaction with a CFIA employee (3%), submitted a food safety or labelling concern (3%), had a friend of family member work at the CFIA (2%), or contacted the CFIA through their website (2%) or phone line (2%).

Figure 5. Interactions with the CFIA



QF5. Select all the following that apply to you. Base: All respondents, n=1,503.

Key segments

Across sub-segments, the following differences were found:

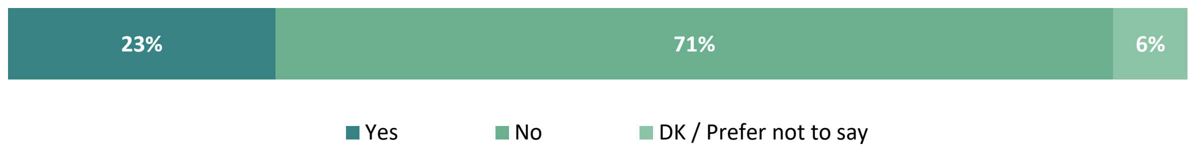
- Those aged 18-34 were more likely than those aged 55 and older to have done the following:
    - Visited the CFIA website (9% versus 5%)

- Contacted the CFIA by phone (3% versus 1%)

- Those aged 18-34 were more likely than those aged 35 and older to have done the following:
  - Follow the CFIA on a social media platform (7% versus 2%)
  - Subscribe to the CFIA food recall notices (6% versus 2%)
- Male respondents were more likely than female respondents to have done the following:
  - Followed the CFIA on a social media platform (5% versus 2%)
  - Subscribed to the CFIA food recall notices (4% versus 3%)
  - Had in in-person interaction with a CFIA employee (4% versus 2%)
  - Contacted the CFIA by phone (3% versus 1%)
- Those who identified as a visible minority were more likely than those who did not to report the following:
  - Visited the CFIA website (13% versus 6%)
  - Followed the CFIA on a social media platform (8% versus 3%)
  - Subscribed to the CFIA food recall notices (8% versus 2%)
  - Contacted the CFIA by email or through the website (5% versus 1%)
- Those who reported a food allergy or sensitivity in their household were more likely than those without one to have done the following:
  - Read articles or watched videos from the CFIA (11% versus 7%)
  - Subscribed to the CFIA food recall notices (6% versus 2%)
  - Submitted a food safety or labelling concern (4% versus 2%)
- Respondents with a university education (9%) were more likely to have visited the CFIA website than those with a college education (5%) or those who have completed high school or less (5%).

Nearly a quarter of respondents (23%) had recently seen, heard, or read something about the CFIA while most had not (71%). Another 6% of respondents were unsure.

Figure 6. Recent awareness of communications surrounding the CFIA



QF6. Have you seen, heard, or read anything recently about the Canadian Food Inspection Agency? Base: Respondents familiar with the CFIA, n=786.

Key segments

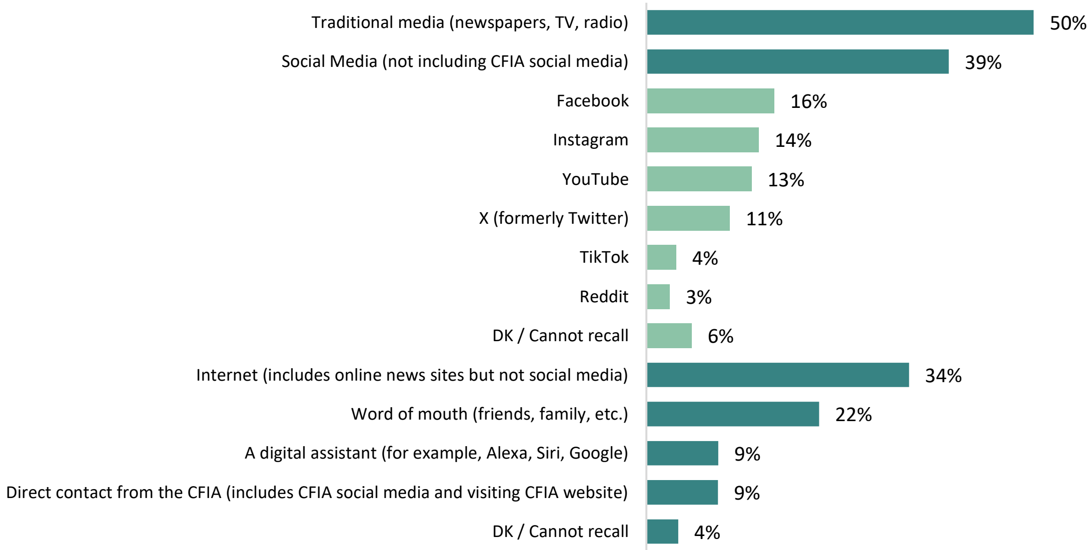
Across sub-segments, those more likely to have recently seen, heard, or read something about the CFIA included:

- Respondents with a food allergy or sensitivity in their household compared to those without one (30% versus 19%)
- Indigenous respondents compared to non-Indigenous respondents (43% versus 22%)
- Respondents who speak French at home compared to those who speak English (32% versus 21%)
- Those who were very familiar with the CFIA (45%) compared to those somewhat (21%) or not very familiar (14%)
- Those who had a great deal of concern with food fraud (31%) compared to those with some concern (21%) or not very much concern (18%)

When asked where they might have recently seen, heard, or read something about the CFIA, half of aware respondents (50%) cited traditional media such as newspapers, television, or radio. Nearly 2 in 5 (39%) cited social media (not including the CFIA's social media) such as Facebook (16%), Instagram (14%), YouTube (13%), X (formerly Twitter, 11%), TikTok (4%), or Reddit (3%) while 6% could not recall the specific social media platform. Additionally, more than two thirds of respondents (34%) had recently seen, heard, or read about the CFIA on internet sources other than social media.

Other sources included word of mouth (22%), a digital assistant (9%) and direct contact from the CFIA such as on the Agency's website or social media accounts (9%). Another 4% of respondents could not recall where they had recently seen, heard, or read about the CFIA.

Figure 7. Channels of information surrounding the CFIA



QF7. Where have you seen, heard, or read about the CFIA? Base: Respondents who had recently seen, heard or read anything about the CFIA, n=171.

Key segments

Across sub-segments, the following differences were found:

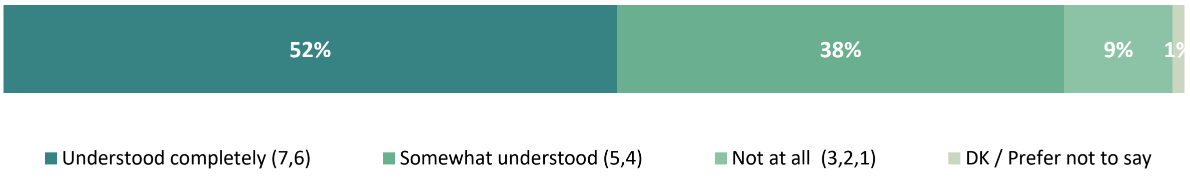
- Respondents aged 55 or older were more likely to cite traditional media compared to respondents aged 54 and younger (70% versus 34%)
- Respondents aged 18-34 were more likely to cite social media compared to respondents aged 35 and older (55% versus 33%)
- Respondents aged 54 and younger were more likely to cite word of mouth than those 55 or older (32% versus 9%).
- Those who speak English at home were more likely than those who speak French at home to mention social media (44% versus 27%) or direct contact with the CFIA (11% versus 2%).

Understanding the CFIA

Those who had recently seen, heard, or read something from the CFIA recently were asked how well they understood the information. A 7-point scale was used with 7 representing “understood completely” while 1 represented “not at all”.

More than half of respondents (52%) understood completely (a score of 6 or 7) and 38% somewhat understood (a score of 4 or 5). Conversely, 9% reported low understanding of the information, assigning a score of 1, 2 or 3.

Figure 8. Understanding information from the CFIA



QU1. Thinking about what you have seen, read or heard from the Canadian Food Inspection Agency, indicate how well you understood the information. Base: Respondents who had recently seen, heard or read anything about the CFIA, n=171.

Key Segments

Across sub-segments, those more likely to report a high level of understanding included:

- Respondents aged 55 and older compared to those aged 18-34 (62% versus 41%)
- Male respondents compared to female respondents (60% versus 42%)
- Respondents with a university education or higher compared to those with a college education (62% versus 39%)
- Respondents who reported a great deal of concern with food fraud compared to those who reported moderate concern (66% versus 38%)

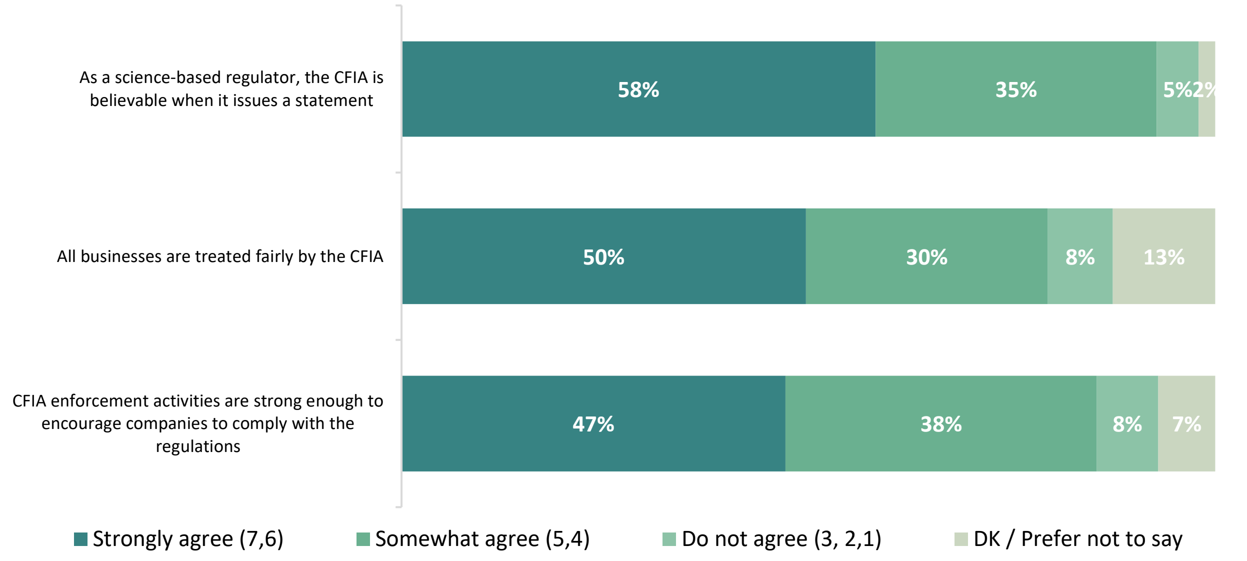
Respondents were asked the extent to which they agreed with various statements regarding the CFIA. A 7-point scale was used with 7 representing “agree completely” and 1 representing “disagree completely”.

Nearly 3 in 5 respondents (58%) strongly agreed that the CFIA is believable when it issues a statement while nearly two thirds (35%) somewhat agreed.

Half of respondents (50%) strongly agreed that all businesses are treated fairly by the CFIA and another 3 in 10 (30%) somewhat agreed. Conversely, less than 1 in 10 (8%) disagreed while over 1 in 10 (13%) were unsure.

Lastly, a little under half of respondents (47%) strongly agreed that CFIA enforcement activities are strong enough to encourage companies to comply with the regulations while 38% somewhat agreed. Less than 1 in 10 disagreed (8%) and a similar proportion were unsure (7%).

Figure 9. General impressions of CFIA activities



QU2. How much do you agree or disagree with each of the following statements? Base: Respondents who had recently seen, heard or read anything about the CFIA, n=171.

Key segments

Across sub-segments, the following differences were found:

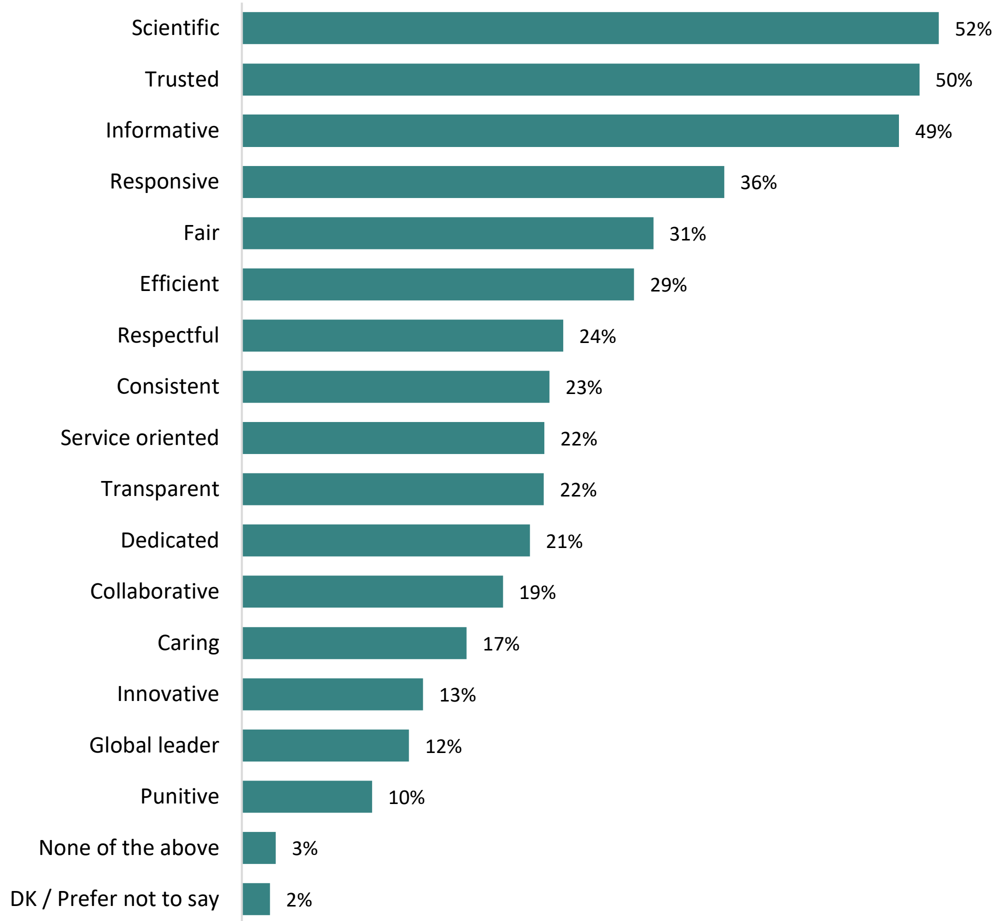
- Respondents aged 55 or older were more likely to agree that the CFIA is believable when it issues a statement compared to those aged 18-34 (71% versus 41%)
- Those who were not concerned about food fraud were more likely to agree that the CFIA is believable when it issues a statement compared to those somewhat concerned about food fraud (79% versus 44%)

When presented with a list of adjectives and asked which ones best described the CFIA, roughly half selected scientific (52%), trusted (50%) and informative (49%).

Two thirds of respondents (36%) viewed the CFIA as responsive while roughly 3 in 10 selected the words fair (31%) and efficient (29%).

More than a fifth would describe the CFIA as respectful (24%), consistent (23%), service oriented (22%), transparent (22%) or dedicated (21%). A slightly smaller proportion would describe the CFIA as collaborative (19%), caring (17%), innovative (13%), a global leader (12%) or punitive (10%).

Figure 10. Associated descriptions of CFIA



QU3. Of the words listed below, please select the ones that best describe the Canadian Food Inspection Agency (CFIA). SELECT ALL THAT APPLY Base: Respondents who had recently seen, heard or read anything about the CFIA, n=171.

Key segments

Across sub-segments, the following differences were found:

- Those who were not concerned about food fraud were more likely to describe the CFIA as "scientific" (72%) compared to those somewhat concerned (48%) or very concerned about food fraud (44%)
- Those who were not concerned about food fraud were more likely to describe the CFIA as "informative" compared to who were very concerned about food fraud (63% versus 39%)
- Respondents aged 55 or older were more likely to use the following terms to describe the CFIA compared to those aged 54 or younger:

- “Trusted” (61% versus 42%)
- “Scientific” (69% versus 39%)

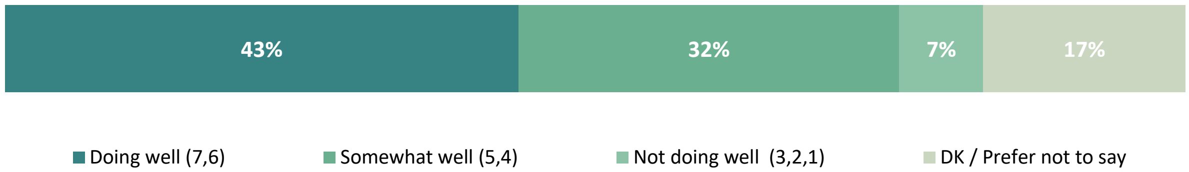
- Those aged 55 or older were more likely to use the following terms to describe the CFIA compared to those aged 18-34:
    - “Informative” (57% versus 36%)
    - “Responsive” (43% versus 21%)
- Respondents aged 18-34 were more likely than those aged 55 or older to describe the CFIA as “innovative (25% versus 7%)
- Men were more likely than women to describe the CFIA as “innovative” (18% versus 8%).

CFIA’s role in food safety awareness

Respondents were asked how well they believed the CFIA was doing at safeguarding the food sold in Canada. A 7-point scale was used with 7 representing “doing well” and 1 representing “not doing well”.

More than 2 in 5 respondents (43%) believed that the CFIA was doing well (a score of 6 or 7) when it comes to safeguarding the food sold in Canada. Just under a third of respondents (32%) believed the CFIA was doing somewhat well (a score of 4 or 5) while fewer (7%) felt the CFIA was not doing well (a score of 1, 2 or 3). Nearly 1 in 5 did not know or preferred not to say (17%).

Figure 11. CFIA performance safeguarding food sold in Canada



QS1. When it comes to safeguarding the **food** sold in Canada, how well do you believe the Canadian Food Inspection Agency is doing? Base: All respondents, n=1,503.

Key segments

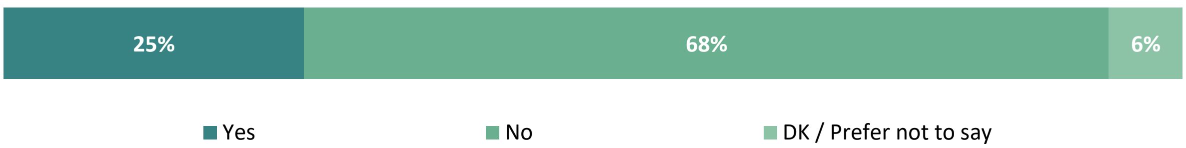
Across sub-segments, those more likely to believe that the CFIA is doing well when it comes to safeguarding food in Canada included:

- Respondents aged 55 or older compared to those aged 54 and younger (53% versus 37%)
- Respondents who reported being very familiar (66%) or somewhat familiar with the CFIA (52%) compared to those who were not familiar (37%)

- Respondents who were not concerned about food fraud (57%) compared to those with some concern (37%) or a great deal of concern (44%)

A quarter of respondents (25%) reported that they had looked for or read information specifically about food safety or food fraud over the past few years.

Figure 12. Seeking information related to food safety or food fraud



QS2. Over the past few years, have you looked for or read information specifically about food safety or food fraud of any kind? Base: All respondents, n=1,503.

Key segments

Across sub-segments, those more likely to have looked for information about food safety or food fraud included:

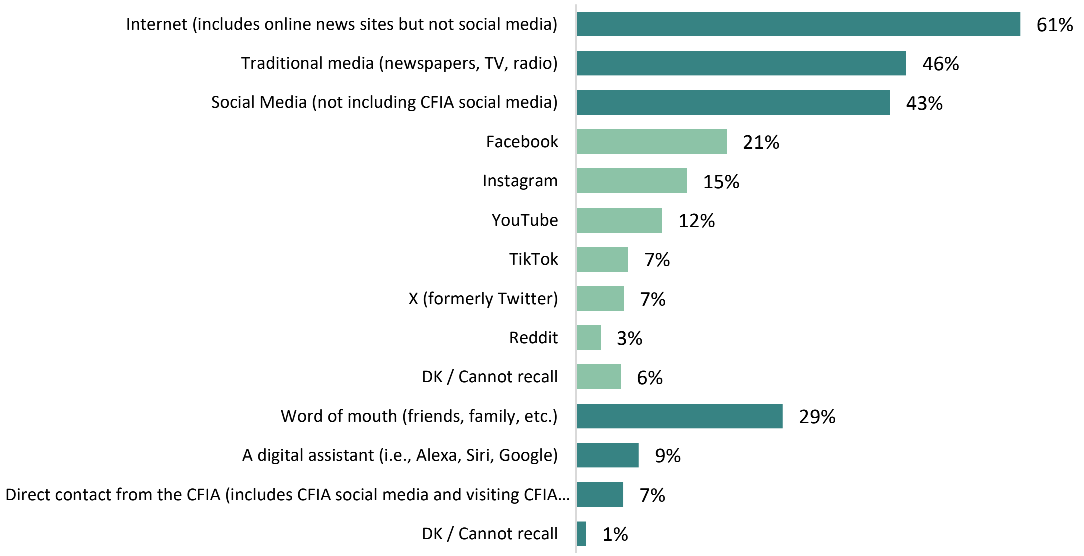
- Respondents who identify as a visible minority compared to those who do not (33% versus 24%)
- Respondents who reported having a food allergy or sensitivity in their household compared to those who do not (34% versus 22%)
- Respondents with a university education (30%) compared to those with a college education (23%) or high school or less (22%)
- Those very familiar (45%) or somewhat familiar (32%) with the CFIA compared to those not very familiar (20%)
- Those who had a great deal of concern about food fraud (35%) compared to those with some concern (24%) or no concern (23%)

Those who had looked for or read information about food safety or food fraud were asked which sources of information they had used for this purpose.

The internet (excluding social media) was the most common source of information (61%) followed by traditional media (46%) and social media (43%). Social media platforms used as sources of information included Facebook (21%), Instagram (15%), YouTube (12%), TikTok (7%), X (formerly Twitter, 7%), and Reddit (3%) while 6% did not recall which platform they had used as a source of food safety or food fraud information.

Additional sources of information included word of mouth (29%), a digital assistant (9%), or direct contact with the CFIA (7%).

Figure 13. Channels used to search for information on food safety or food fraud



QS3. What sources of information about food safety or food fraud have you recently used? SELECT ALL THAT APPLY Base: Respondents that recently looked for information about food safety or food fraud, n=379.

Key segments

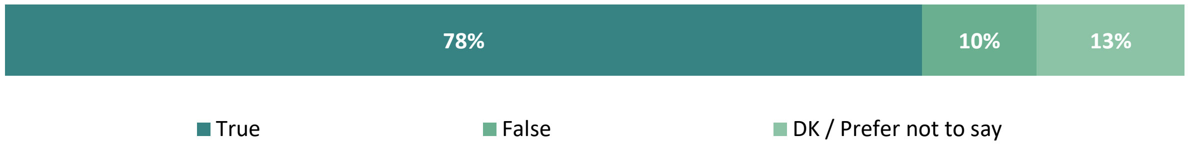
Across sub-segments, the following differences were found:

- Respondents aged 35 and older were more likely than those aged 18-34 to report using the internet (excluding social media) as a source of information on food safety (67% versus 47%)
- Respondents aged 18-34 were more likely to mention social media compared to those aged 55 or older (55% versus 35%)
- Respondents aged 55 or older were more likely that those aged 54 and younger to mention traditional media (64% versus 32%)
- Respondents aged 54 and younger were more likely than those aged 55 or older to mention the following sources:
    - Word of mouth (37% versus 16%)
    - A digital assistant (13% versus 3%)

- Respondents who identified as a visible minority were more likely to mention using social media as a source of information regarding food safety compared to those who did not identify as a visible minority (64% versus 38%)
- Those who did not identify as a visible minority were more likely to mention traditional media compared to those who identified as a visible minority (50% versus 32%)
- Those with food allergies or sensitivities in their household were more likely than those without one to mention using social media (53% versus 36%) and a digital assistant (14% versus 5%)

Respondents were presented with the statement "I believe food recalls illustrate that the food safety system is working." Nearly 4 in 5 (78%) felt this was true while 1 in 10 (10%) felt the statement was false and a similar proportion (13%) were unsure.

Figure 14. Impact of food recalls on perception of food safety system



QS4. I believe food recalls illustrate that the food safety system is working. Base: All respondents, n=1,503.

Key segments

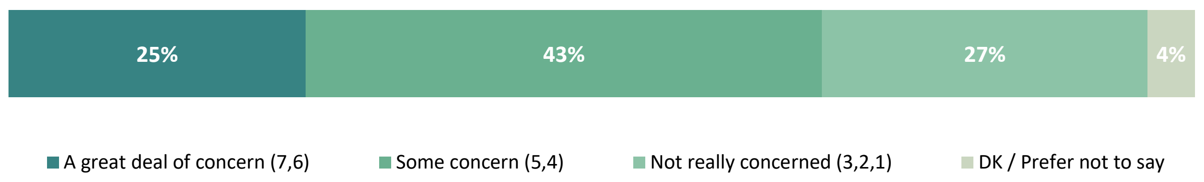
Across sub-segments, those more likely to believe this statement is true included:

- Those aged 55 or older compared to those aged 54 and younger (83% versus 74%)
- Respondents with a household income of $80k+ compared to those with a household income of $40k or less (81% versus 72%)
- Respondents who reported being not very concerned about food fraud (86%) compared to those who were somewhat concerned (77%) or had a great deal of concern (76%)

Respondents were asked how concerned they were with food recalls in general. A 7-point scale was used with 7 representing "very concerned" and 1 representing "not at all concerned".

One quarter of respondents (25%) had a great deal of concern regarding food recalls (a score of 6 or 7) while 43% had some concern. On the other hand, more than a quarter of respondents were not very concerned about food recalls (27% gave a score of 1, 2 or 3) while 4% were unsure.

Figure 15. General concern with food recalls



QS5. How concerned are you with food recalls in general? Base: All respondents, n=1,503.

Key segments:

Across sub-segments, those more likely to report a great deal of concern regarding food recalls included:

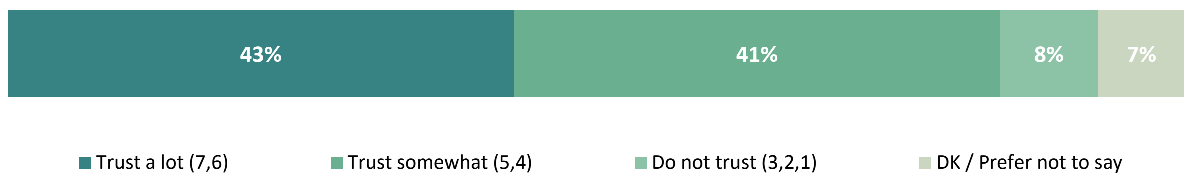
- Respondents aged 55 or older compared to respondents aged 54 and younger (32% versus 20%)
- Female respondents compared to male respondents (28% versus 22%)
- Respondents who identified as a visible minority compared to those who did not (34% versus 24%)
- Those with a household income of less than $40k compared to those with a household income of $80k and above (28% versus 22%)
- Respondents very familiar with the CFIA (40%) compared to those who were somewhat familiar (25%) or not very familiar (23%)
- Those who reported a great deal of concern regarding food fraud (51%) compared to those with a moderate level of concern (20%) or a low level of concern (12%)

Trusting the CFIA's food safety procedures

Next, respondents were asked how much they trust the CFIA to do what is right to help ensure that food is safe in Canada. A 7-point scale was used with 7 representing “trust completely” and 1 representing “do not trust at all”.

Over 2 in 5 respondents (43%) reported high trust (a score of 6 or 7) and another 2 in 5 (41%) said they somewhat trusted the CFIA to do what is right to help ensure that food is safe in Canada (a score of 4 or 5). Conversely, less than 1 in 10 respondents (8%) reported low trust (a score of 1, 2, or 3) and a similar proportion (7%) were unsure.

Figure 16. Trust in CFIA food safety procedures



QP1. 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. Base: All respondents, n=1,503.

Key segments

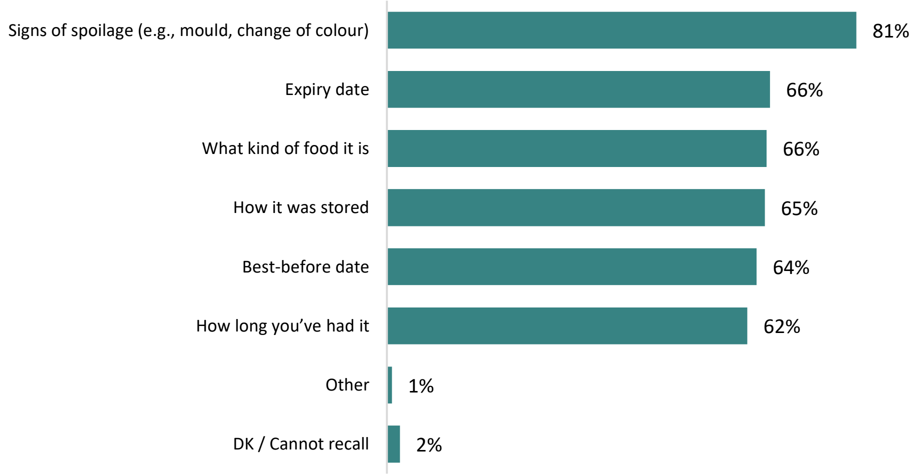
Across sub-segments, those more likely to report a high level of trust in the CFIA to do what is right to help ensure that food is safe in Canada included:

- Respondents aged 55 or older compared to respondents aged 54 and younger (52% versus 37%)
- Respondents who reported being very familiar (62%) or somewhat familiar (51%) with the CFIA compared to those who were not very familiar (37%)

Respondents were asked a series of questions related to food consumption and “best-before” dates.

When it comes to deciding whether a food can still be eaten, participants seem to take into consideration a variety of factors. Participants most commonly look for and consider signs of spoilage (81%), expiry dates (66%), what kind of food it is (66%), how it was stored (65%), “best before” dates (64%) and how long they have had the food (62%).

Figure 17. Factors considered when determining if a food can still be eaten



QP2. What factors do you consider when deciding if a food can still be eaten? SELECT ALL THAT APPLY Base: All respondents, n=1,503.

Key segments

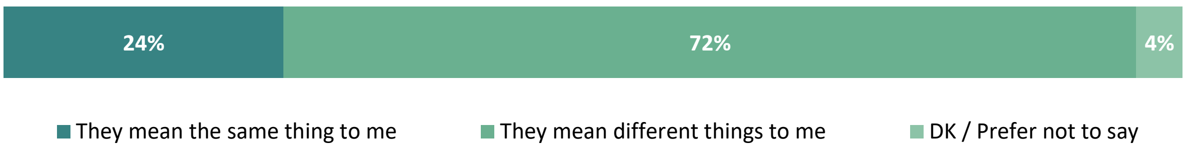
Across sub-segments, the following differences were found:

- Respondents outside of Quebec were more likely than those living in Quebec to report using the following factors when deciding if a food can still be eaten:
    - The expiry date (72% versus 46%)
    - How it was stored (69% versus 53%)
- Respondents aged 35 and older were more likely than those aged 18-34 to report using the following factors when deciding if a food can still be eaten:
    - Signs of spoilage (84% versus 74%)
    - How it was stored (68% versus 60%)
    - What kind of food it is (68% versus 59%)
- Respondents aged 55 and older were more likely than those aged 54 and younger to consider how long they have had the food when deciding if it can still be eaten (69% versus 58%).
- Female respondents were more likely than male respondents to report using the following factors when deciding if a food can still be eaten:
    - Signs of spoilage (86% versus 76%)
    - Expiry date (70% versus 63%)
    - How it was stored (69% versus 61%)
    - What kind of food it is (72% versus 59%)

- How long they've had it (67% versus 58%)
- Non-Indigenous respondents were more likely than those who identified as Indigenous to report using the following factors when deciding if a food can still be eaten:
    - Expiry date (67% versus 47%)
    - How it was stored (66% versus 49%)
    - What kind of food it is (67% versus 50%)
    - "Best-before" date (65% versus 49%)
- Those who did not identify as a visible minority were more likely to report using the following factors when deciding if a food can still be eaten:
    - Signs of spoilage (84% versus 72%)
    - How it was stored (68% versus 58%)
    - What kind of food it is (69% versus 58%)
    - How long they've had it (65% versus 52%)
- Those who identified as a visible minority were more likely than those who did not to report using the expiry date when considering whether a food can still be eaten (75% versus 66%).

When it comes to "best before" dates and expiration dates, nearly a quarter of respondents (24%) reported that these terms meant the same thing to them. Conversely, over 7 in 10 respondents (72%) said that the terms meant different things to them.

Figure 18. Understanding of "best before" dates and "expiration date" terminology



QP3. Do the terms "best before date" and "expiration date" mean the same thing to you? Base: All respondents, n=1,503.

Key segments

Across sub-segments, those more likely to report that these date labels mean the same thing to them included:

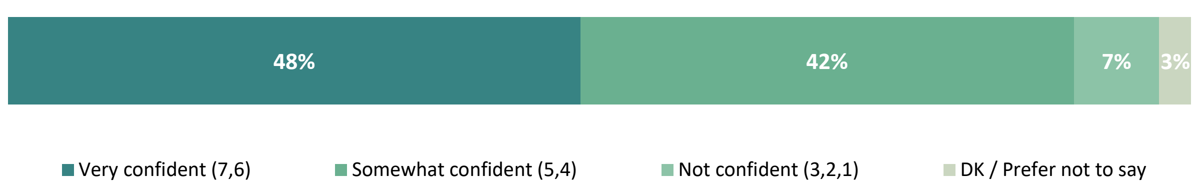
- Those with a household income of less than $40k compared to those with a household income of $40k and above (31% versus 22%)

- Respondents living in urban areas compared to those living in rural areas (25% versus 17%)
- Those who reported being very familiar with the CFIA (33%) compared to those who were somewhat familiar (22%) or not very familiar (23%)

Respondents were asked to rate their confidence in using date labels, such as “best before” dates and expiration dates among others, to determine whether a food could still be eaten. A 7-point scale was used with 7 representing “very confident” and 1 representing “not at all confident”.

Nearly half of respondents (48%) were very confident that they know how to use date labels when judging if a food can still be eaten (a score of 6 or 7). A slightly smaller proportion (42%) were somewhat confident (a score of 4 or 5). Conversely, just 7% were not confident (a score of 1, 2 or 3) while 3% were unsure.

Figure 19. Confidence in interpreting date labels



QP4. How confident are you that you know how to use date labels (for example, best-before dates, manufactured on dates, packaged on dates and expiry dates) when judging whether a food can still be eaten? Base: All respondents, n=1,503.

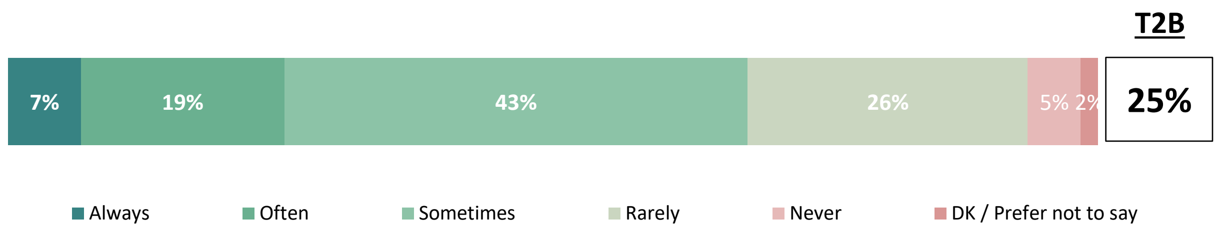
Key segments

Across sub-segments, those more likely to report high confidence when it comes to using date labels when judging whether a food can still be eaten included:

- Those aged 35 and older compared to those aged 18-34 (52% versus 39%)
- Those who speak English at home compared to those who speak French at home (51% versus 41%)

A quarter of respondents (25%) regularly throw out food when it has passed the “best before” date (7% always do while 19% often do). Another 43% sometimes throw away food that has passed the “best before” date. On the other hand, just over a quarter of respondents (26%) reported that they rarely do so and an additional 5% never throw away food when it’s past the “best before date”.

Figure 20. Frequency of throwing out food past the "best before" date



QP5. How often do you throw out food when it's past the best-before date? Base: All respondents, n=1,503.

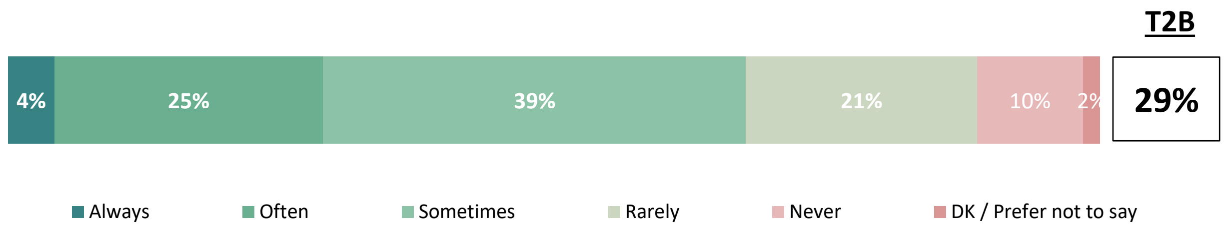
Key segments

Across sub-segments, those more likely to report always or often throwing out food that has passed the "best before" date included:

- Respondents aged 54 and younger compared to those aged 55 or older (30% versus 19%)
- Female respondents compared to males (28% versus 22%)
- Respondents who identify as a visible minority compared to those who do not (33% versus 24%)
- Those with a food allergy or sensitivity in the household compared to those without one (30% versus 24%)

Nearly 3 in 10 respondents (29%) reported that they regularly purchase food that has been discounted because the "best before" date is approaching (4% always do while 25% often do) while 39% sometimes do so. Conversely, 21% rarely purchase food that has been discounted because it is approaching the "best before" date and 10% never do so.

Figure 21. Frequency of purchasing discounted food approaching the "best before" date



QP6. How often do you buy foods that are on discount because the best-before date is approaching? Base: All respondents, n=1,503.

Key segments

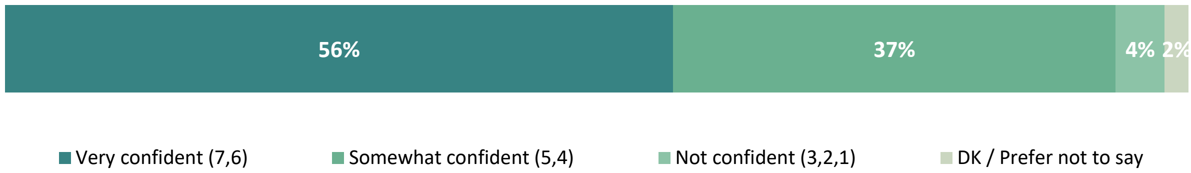
Across sub-segments, those more likely to report always or often buying foods that are on discount because the "best before" date is approaching included:

- Respondents living in Atlantic Canada (28%) or Ontario (31%) compared to those living in Quebec (22%)
- Respondents aged 54 and younger compared to those aged 55 or older (32% versus 25%)
- Those with a food allergy or sensitivity in the household compared to those without one (33% versus 27%)
- Respondents who speak English at home compared to those who speak French at home (31% versus 22%)

Respondents were asked to rate their confidence that food sold in Canada is safe. A 7-point scale was used with 7 representing "very confident" and 1 representing "not at all confident".

More than half of respondents (56%) reported being very confident in the safety of food sold in Canada (a score of 6 or 7). Additionally, close to 2 in 5 (37%) said they were somewhat confident (a score of 4 or 5) and 4% reported low confidence (scores of 1, 2 or 3).

Figure 22. Confidence of food safety in Canada



QP7. Please rate your level of confidence that food sold in Canada is safe. Base: All respondents, n=1,503.

Key segments

Across sub-segments, those more likely to report high confidence that food sold in Canada is safe included:

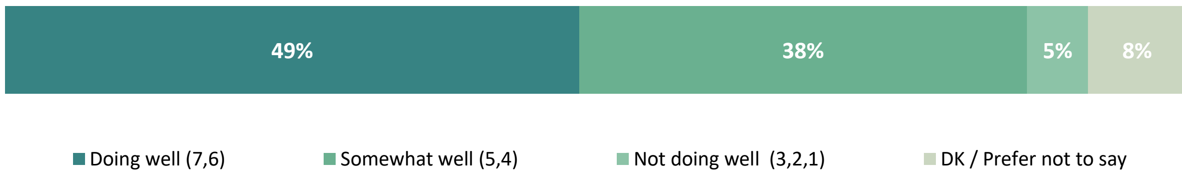
- Respondents aged 55 or older compared to those aged 54 and younger (68% versus 49%)
- Non-Indigenous respondents compared to those who identified as Indigenous (58% versus 38%)
- Respondents who did not identify as a visible minority compared to those who did (60% versus 47%)
- Respondents who did not report a food allergy or sensitivity in their household compared to those who did (59% versus 52%)
- Respondents with a household income of $40k and above compared to those with a household income of less than $40k (59% versus 48%)

- Respondents who reported low concern with food fraud (74%) compared to those who reported moderate (46%) or high concern (57%)

Next, respondents were asked to rate how well they believe the CFIA is doing when it comes to verifying that food sold in Canada is safe. A 7-point scale was used with 7 representing “doing well” and 1 representing “not doing well”.

Just under half of respondents (49%) felt that the CFIA was doing well in this regard (a score of 6 or 7) and nearly 2 in 5 (38%) felt that the CFIA was doing somewhat well (a score of 4 or 5). On the other hand, just 5% felt the CFIA was not doing well when it comes to verifying that food sold in Canada is safe (a score of 1, 2 or 3). Another 8% were unsure.

Figure 23. CFIA performance verifying food safety



QP8. When it comes to verifying that food sold in Canada is safe, how well do you believe the Canadian Food Inspection Agency is doing? Base: All respondents, n=1,503.

Key segments

Across sub-segments, those more likely to believe that the CFIA is doing well when it comes to verifying that food sold in Canada is safe included:

- Those aged 55 or older compared to those aged 54 and younger (59% versus 42%)
- Respondents with a household income of $80k and above compared to those with a household income of less than $40k (51% versus 43%)
- Respondents who reported being very familiar (64%) or somewhat familiar with the CFIA (56%) compared to those who reported not being very familiar (43%)
- Respondents who reported low concern with food fraud (64%) compared to those who reported moderate (38%) or high concern (52%)

Respondents were asked to which extent they agreed with various statements regarding some of the roles the CFIA plays when it comes to food safety. A 7-point scale was used with 7 representing “agree completely” and 1 representing “disagree completely”.

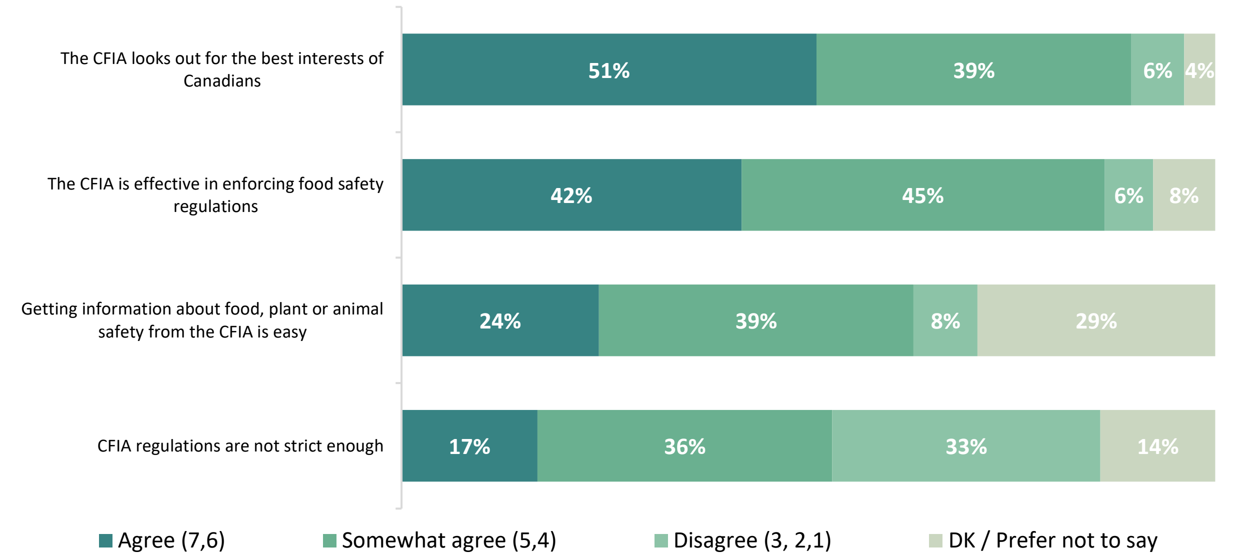
Just over half of respondents (51%) agreed that the CFIA looks out for the best interests of Canadians while nearly 2 in 5 (39%) somewhat agreed and just 6% disagreed. Another 4% were unsure.

More than 2 in 5 (42%) agreed that the CFIA is effective in enforcing food safety regulations. A similar proportion somewhat agreed and just 6% disagreed. Another 8% were unsure.

Just under a quarter of respondents (24%) agreed that getting information about food, plant or animal safety from the CFIA is easy while 39% somewhat agreed and 8% disagreed. Just under 3 in 10 (29%) were unsure.

Less than a fifth (17%) agreed that CFIA regulations are not strict enough while 36% somewhat agreed. Conversely, a third of respondents (33%) disagreed and 14% were unsure.

Figure 24. Impressions of CFIA and food safety in Canada



QP9. How much do you agree or disagree with each of the following statements? Base: Respondents familiar with the CFIA, n=786.

Key segments

Across sub-segments, those more likely to agree that the CFIA looks out for the best interests of Canadians included:

- Those aged 55 or older compared to those aged 54 and younger (65% versus 41%)
- Respondents who did not have a food allergy or sensitivity in their household compared to those who did (55% versus 45%)
- Respondents who were very familiar (57%) or somewhat familiar (54%) with the CFIA compared to those who were not very familiar (41%)
- Respondents who reported low concern with food fraud (66%) compared to those who reported moderate (42%) or high concern (52%)

Those more likely to agree that the CFIA is effective in enforcing food safety regulations included:

- Those aged 55 or older compared to those aged 54 and younger (53% versus 34%)
- Respondents who were very familiar (56%) or somewhat familiar (42%) with the CFIA compared to those who were not very familiar (33%)

Those more likely to agree that getting information about food, plant or animal safety from the CFIA is easy included:

- Those aged 55 or older compared to those aged 18-34 (27% versus 19%)
- Respondents who were very familiar with the CFIA (44%) compared to those who were somewhat familiar with the CFIA (23%) or not very familiar (15%)

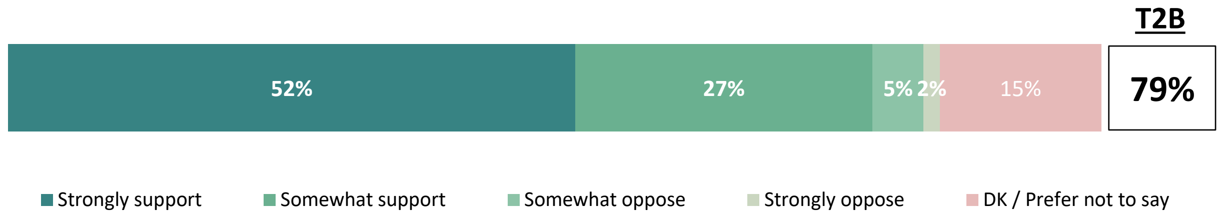
Those more likely to agree that CFIA regulations are not strict enough included:

- Those aged 55 or older compared to those aged 18-34 (20% versus 16%)
- Male respondents compared to female respondents (20% versus 13%)
- Respondents who speak French at home compared to those who speak English at home (25% versus 15%)
- Respondents who reported a great deal of concern with food fraud (32%) compared to those who reported moderate (12%) or low concern (10%)

Respondents were asked the extent to which they support the CFIA publishing names of companies that receive administrative monetary penalties (AMP's) due to having not complied with regulations.

Overall, nearly 4 in 5 respondents (79%) support the CFIA publishing names of these companies (52% strongly support this action while 27% somewhat support). A much smaller proportion are opposed to this enforcement action (5% somewhat oppose while 2% strongly oppose). Another 15% were unsure.

Figure 25. Support for publishing names of companies that receive AMPs



QP10. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose CFIA publishing names of companies that receive AMPs? Base: All respondents, n=1,503.

Key segments

Across sub-segments, those more likely to somewhat support or strongly support publishing names of companies that receive AMPs included:

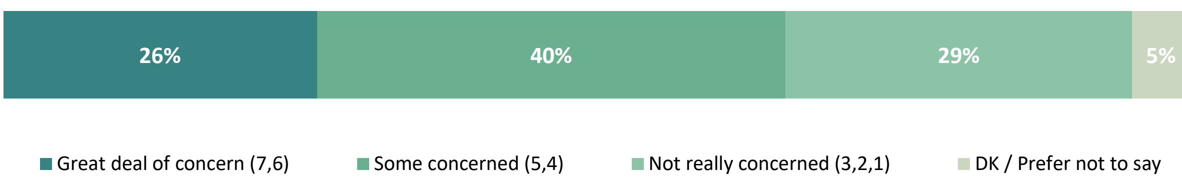
- Respondents aged 35 and older compared to those aged 18-34 (84% versus 66%)
- Male respondents compared to female respondents (83% versus 76%)
- Those with a university education compared to those who have completed high school or less (82% versus 74%)
- Those with a household income of $40k and above compared to those with a household income of less than $40k (82% versus 73%)

Food fraud

Next, respondents were asked a series of questions related to food fraud.

Just over a quarter of respondents (26%) reported a great deal of concern regarding food fraud when they go grocery shopping. Another 2 in 5 (40%) were somewhat concerned while just under 3 in 10 (29%) were not particularly concerned with food fraud when grocery shopping. A small proportion of respondents (5%) were unsure.

Figure 26. Concern with food fraud when grocery shopping



QFF1. Generally, how concerned are you with food fraud when you go grocery shopping? Base: All respondents, n=1,503.

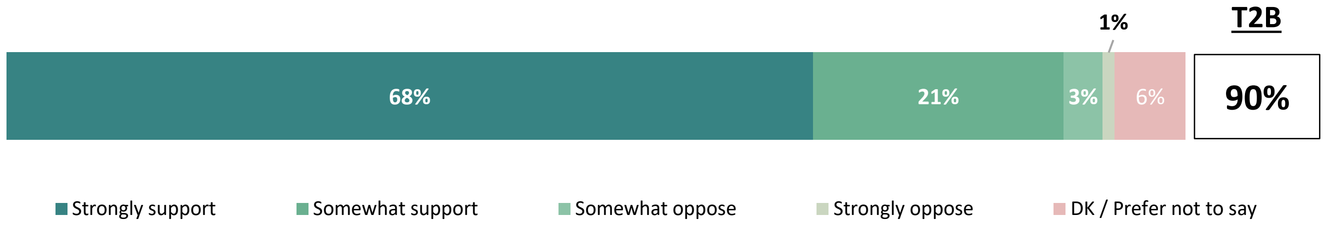
Key segments

Across sub-segments, those more likely to report a great deal of concern regarding food fraud included:

- Respondents aged 35 and older compared to those aged 18-34 (30% versus 18%)
- Respondents who identified as a visible minority compared to those who did not (36% versus 25%)
- Respondents who reported a food allergy or sensitivity in their household compared to those who did not (31% versus 25%)
- Respondents who reported being very familiar with the CFIA (47%) compared to those who reported being somewhat familiar (25%) or not very familiar (25%)

Respondents were asked the extent to which they support the CFIA publishing names of companies that have been found to have committed food fraud.
Overall, 90% of respondents at least somewhat support this enforcement action (68% strongly support while 21% somewhat support). A much smaller proportion of respondents were opposed to this enforcement action (3% somewhat oppose while 1% strongly oppose). Another 6% were unsure.

Figure 27. Publishing names of companies that have committed food fraud



QFF2. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose CFIA publishing names of companies that have been found to have committed food fraud? Base: All respondents, n=1,503.

Key segments

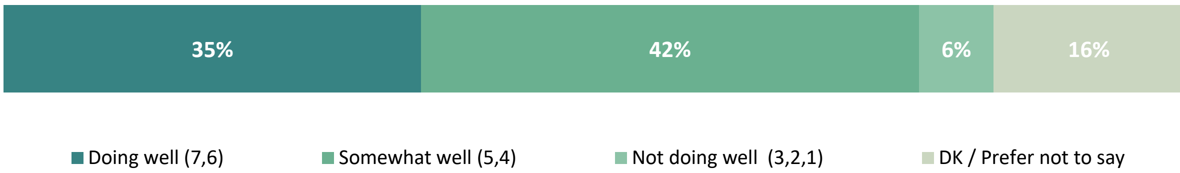
Across sub-segments, those more likely to somewhat support or strongly support publishing names of companies that commit food fraud included:

- Respondents aged 35 and older compared to those aged 18-34 (92% versus 82%)
- Non-Indigenous respondents compared to those who identified as Indigenous (91% versus 79%)
- Respondents who did not identify as a visible minority compared to those who did (92% versus 84%)
- Those with a university education (91%) or college education (92%) compared to those who have completed high school or less (85%)

Respondents were asked how well they believed the CFIA was doing when it comes to safeguarding from misrepresented food sold in Canada. A 7-point scale was used with 7 representing “doing well” and 1 representing “not doing well”.

Just over one third of respondents (35%) believed that the CFIA was doing well (a score of 6 or 7) when it comes to safeguarding from misrepresented food sold in Canada. Additionally, 42% believed the CFIA was doing somewhat well (a score of 4 or 5). Conversely, less than 1 in 10 (6%) felt the CFIA was not doing well (a score of 1, 2 or 3) and another 16% were unsure.

Figure 28. CFIA performance safeguarding from misrepresented food



QFF3. When it comes to safeguarding from misrepresented food being sold in Canada, how well do you believe the Canadian Food Inspection Agency is doing? Base: All respondents, n=1,503.

Key segments

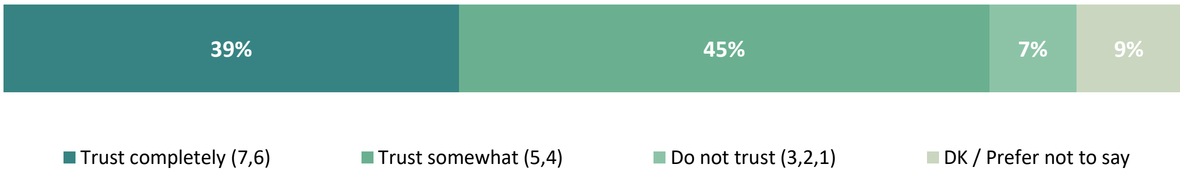
Across sub-segments, those more likely to believe that the CFIA is doing well when it comes to safeguarding from misrepresented food included:

- Those aged 55 or older compared to those aged 54 and younger (43% versus 30%)
- Male respondents compared to female respondents (38% versus 33%)
- Respondents who reported being very familiar (54%) or somewhat familiar (42%) with the CFIA compared to those who reported being not very familiar (30%)

Respondents were asked to rate the extent to which they trust the CFIA to inspect food product labels for ingredients to which people may be allergic or sensitive. A 7-point scale was used with 7 representing “trust completely” and 1 representing “do not trust at all”.

Nearly 2 in 5 respondents (39%) reported a high level of trust in the CFIA to inspect food product labels for ingredients to which people may be allergic or sensitive (scores of 6 or 7). A slightly larger proportion (45%) said they somewhat trust the CFIA in this regard. Less than 1 in 10 (7%) had a low level of trust in the CFIA when it comes to inspecting food product labels for ingredients to which people may be allergic or sensitive and a similar proportion (9%) were unsure.

Figure 29. Trust in CFIA inspection of labels for ingredients to which people may be allergic or have a sensitivity



QFF4. How much do you trust the Canadian Food Inspection Agency (CFIA) to inspect food product labels for ingredients to which people may be allergic or have a sensitivity? Base: All respondents, n=1,503.

Key segments

Across sub-segments, those more likely to report high trust in the CFIA when it comes to inspecting food product labels for ingredients to which people may be allergic or have a sensitivity included:

- Respondents aged 35 or older compared to those aged 18-34 (42% versus 30%)
- Those with a household income of $40k and above compared to those with a household income of less than $40k (41% versus 31%)
- Respondents who reported being very familiar (58%) or somewhat familiar (44%) with the CFIA compared to those who reported being not very familiar (34%)

Respondents were asked to rate their confidence in the CFIA to take enforcement action to protect consumers from food fraud. A 7-point scale was used with 7 representing "very confident" and 1 representing "not at all confident".

Just over than 2 in 5 respondents (41%) reported high confidence that the CFIA will take enforcement action to protect consumers from food fraud (scores of 6 or 7) while a similar proportion (42%) were somewhat confident (scores of 4 or 5). On the other hand, less than 1 in 10 respondents (8%) were not very confident (scores of 1, 2 or 3) and a similar proportion (9%) were unsure.

Figure 30. Confidence in CFIA enforcement action to protect consumers from food fraud

QFF5. Rate your level of confidence that the CFIA will take enforcement action to protect consumers from food fraud. Base: All respondents, n=1,503.

Key segments

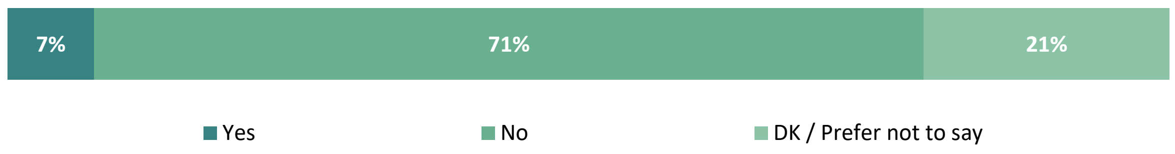
Across sub-segments, those more likely to report a high level of confidence that the CFIA will take enforcement actions to protect consumers from food fraud included:

- Respondents aged 55 or older compared to those aged 54 and younger (48% versus 36%)
- Respondents who speak English at home compared to those who speak French (42% versus 36%)
- Respondents who reported being very familiar (63%) or somewhat familiar (47%) with the CFIA compared to those who reported low familiarity (35%)

Respondents were asked whether they had knowingly experienced food fraud within the past year.

Less than 1 in 10 (7%) had experienced food fraud within the past year while 21% were unsure.

Figure 31. Recent experiences with food fraud



QFF6. To the best of your knowledge have you experienced food fraud in the past year? Base: All respondents, n=1,503.

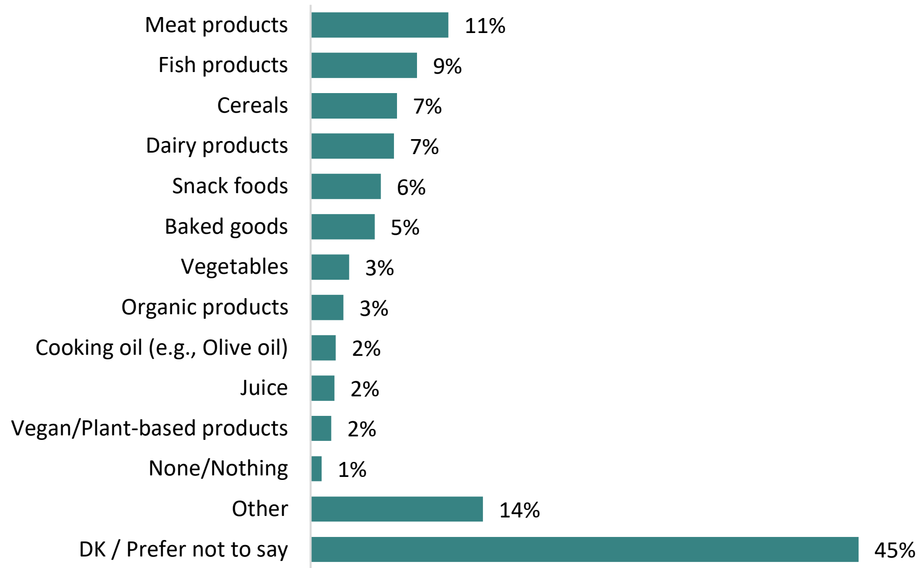
Key segments

Across sub-segments, those more likely to have reported experiencing food fraud within the past year included:

- Respondents who identify as a visible minority compared to those who do not (12% versus 6%)
- Respondents who reported a food allergy or sensitivity in their household compared to those who did not (13% versus 5%)
- Those who reported a great deal of concern regarding food fraud (13%) or a moderate level of concern (8%) compared to those with low concern (2%)

Of those who had experienced food fraud within the past year (n=111), 11% believed they had encountered misrepresented meat products, followed by fish products (9%), cereal (7%), dairy products (7%), snack foods (6%), baked goods (5%), vegetables (3%), organic products (3%), cooking oils (2%), juice (2%) and vegan products (2%).

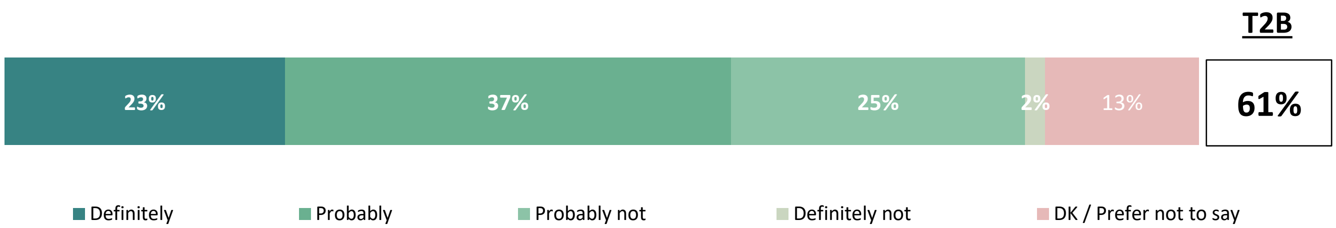
Figure 32. Examples of misrepresented products



QFF7. Which product or products did you believe were misrepresented? Base: Respondents that experienced food fraud in the past year, n=111.

Nearly a quarter of respondents (23%) said that if they suspected food fraud, they would definitely report it to the CFIA, while more than one third (37%) would probably report it. Conversely, 25% would probably not report suspected food fraud to the CFIA and another 2% definitely would not report it. More than 1 in 10 (13%) were unsure whether they would report suspected food fraud.

Figure 33. Likelihood of reporting suspected food fraud to the CFIA



QFF8. If I suspected food fraud, I would report it to the CFIA. Base: All respondents, n=1,503.

Key segments

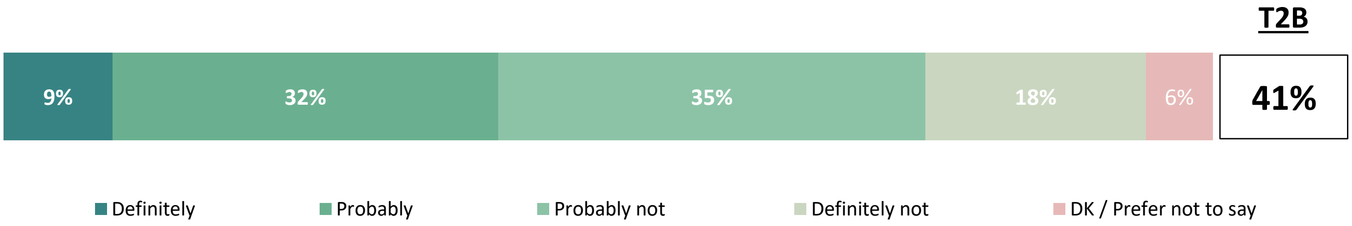
Across sub-segments, those more likely to definitely or probably report suspected food fraud to the CFIA included:

- Those aged 35 and older compared to those aged 18-34 (64% versus 52%)
- Respondents who identified as a visible minority compared to those who did not (70% versus 60%)

- Respondents who reported being very familiar (81%) or somewhat familiar (66%) with the CFIA compared to those who reported low familiarity (56%)
- Respondents who reported a great deal of concern regarding food fraud (71%) compared to those with moderate concern (59%) or low concern (60%)

Of those who suggested that they would definitely or probably report suspected food fraud (n=898), roughly 2 in 5 (41%) would know how to report it (9% definitely, 32% probably) while more than half (54%) would not know how to report it (35% probably not, 18% definitely not).

Figure 34. Knowledge of how to report food fraud



QFF9. I would know how to report it. Base: Respondents that would report suspected food fraud, n=898.

Key segments

Across sub-segments, those more likely to believe that they would definitely or probably know how to report suspected food fraud included:

- Male respondents compared to female respondents (45% versus 37%)
- Respondents who reported being very familiar (71%) or somewhat familiar (51%) with the CFIA compared to those who reported low familiarity (29%)
- Respondents who reported a great deal of concern regarding food fraud (49%) compared to those with moderate concern (40%) or low concern (36%)

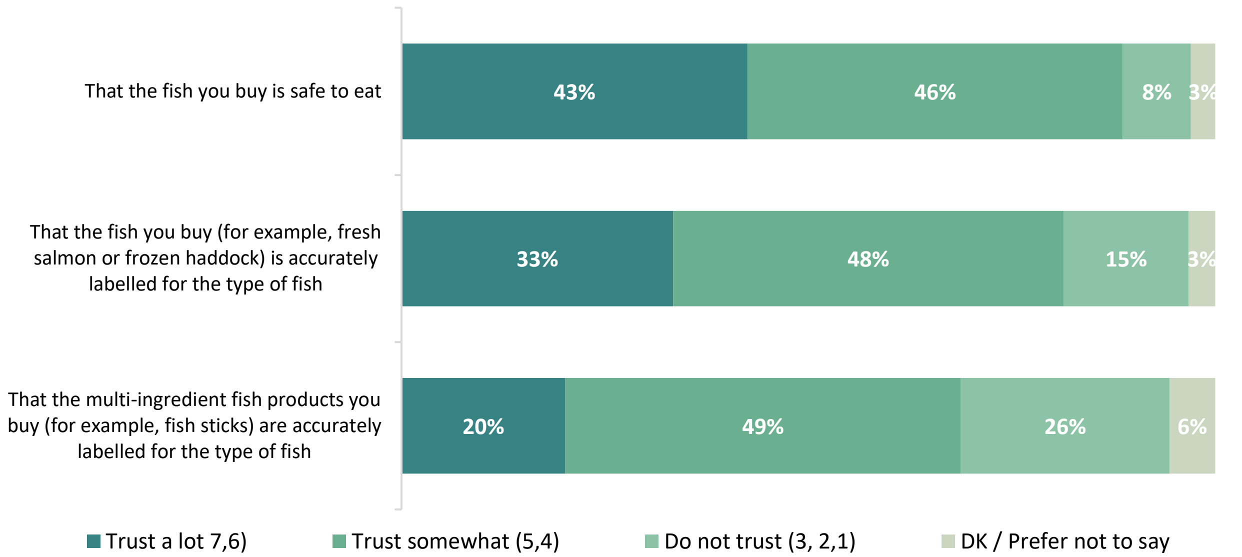
More than 1 in 10 respondents reported not eating or buying fish (13%). Those who eat or buy fish were asked to rate their level of trust on a series of statements related to fish products. A 7-point scale was used with 7 representing “trust completely” and 1 representing “do not trust at all”.

Among those who purchase fish products (n=1,272), more than 2 in 5 respondents (43%) reported high trust (scores of 6 or 7) that the fish they buy is safe to eat while a slightly larger proportion (46%) reported moderate trust (scores of 4 or 5). On the other hand, less than 1 in 10 (8%) reported low trust that the fish they buy is safe to eat and 3% were unsure.

A third of respondents (33%) reported high trust that the fresh fish they buy is properly labelled for the type of fish that it is while nearly half (48%) reported moderate trust. More than 1 in 10 (15%) reported low trust in this regard while 3% were unsure.

When it comes to the multi-ingredient fish products that respondents buy (for example, fish sticks), a fifth (20%) had high trust that these products are accurately labelled for the type of fish they contain. Just under half (49%) reported moderate trust regarding the labelling of multi-ingredient fish products while just over one quarter (26%) reported low trust. Another 6% were unsure.

Figure 35. Trust in fish products



QFF10. How would you describe your level of trust in the following? Base: Respondents that eat or buy fish, n=1,272.

Key segments

Across sub-segments, those more likely to report high trust that the fish they buy is safe to eat included:

- Male respondents compared to female respondents (40% versus 33%)
- Non-Indigenous respondents compared to those who identified as Indigenous (37% versus 25%)
- Respondents who reported being very familiar with the CFIA (48%) compared to those who reported not being very familiar (34%)
- Respondents who reported being not very concerned with food fraud (54%) compared to those who reported moderate concern (28%) or a great deal of concern (33%)

Those more likely to report high trust that the fish they buy is accurately labeled for the type of fish included:

- Non-Indigenous respondents compared to those who identified as Indigenous (29% versus 14%)
- Respondents who reported being very familiar with the CFIA (38%) compared to those who reported not being very familiar (27%)
- Respondents who reported being not very concerned with food fraud (45%) compared to those who reported moderate concern (20%) or a great deal of concern (26%)

Those more likely to report high trust that the multi-ingredient fish products they buy are accurately labelled for the type of fish included:

- Respondents who reported being very familiar with the CFIA (28%) compared to those who reported not being very familiar (15%)
- Respondents who reported being not very concerned with food fraud (29%) compared to those who reported moderate concern (11%) or a great deal of concern (16%)

Respondents who eat or buy fish were asked to which extent they trust various locations when it comes to the fish that they sell. A 7-point scale was used with 7 representing “trust completely” and 1 representing “do not trust at all”.

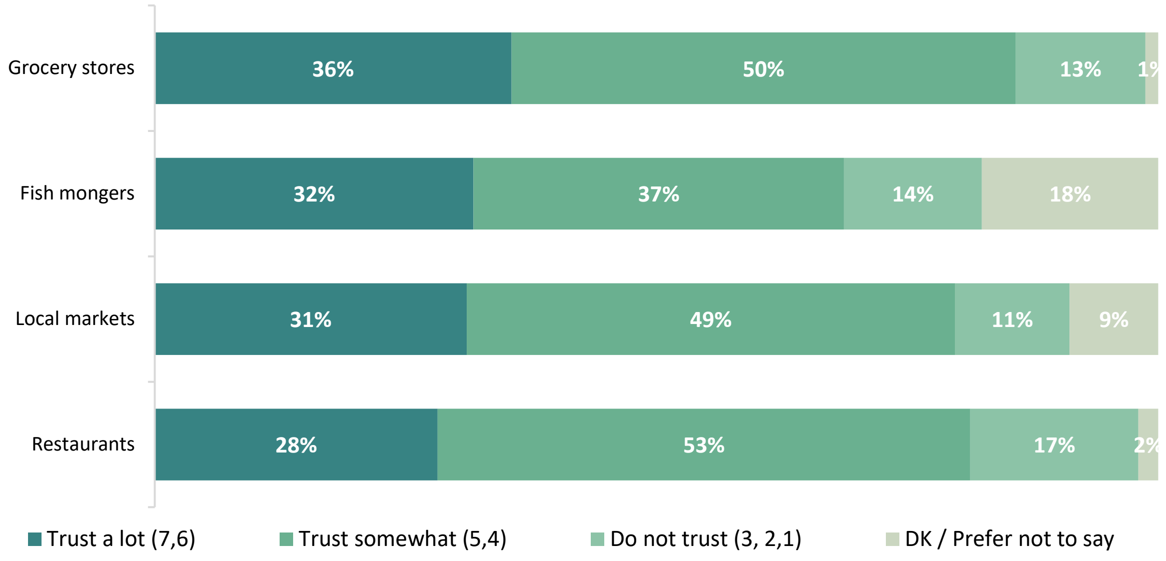
Trust was highest among grocery stores with more than a third of respondents (36%) reporting high levels of trust (scores of 6 or 7) while half (50%) reported that they somewhat trust this source (scores of 4 or 5). Conversely, more than 1 in 10 (13%) had low trust in grocery stores when it comes to the type of fish they sell and another 1% were unsure.

Fish mongers were highly trusted by just under a third of respondents (32%) while a larger proportion of respondents (37%) assigned moderate trust. On the other hand, more than 1 in 10 respondents (14%) reported low trust in fish mongers. Nearly a fifth respondents (18%) were unsure of their level of trust in fish mongers when it comes to the fish that they sell.

Nearly a third of respondents (31%) reported high trust in local markets when it comes to the fish that they sell while just under half (49%) reported moderate trust. Conversely, just over 1 in 10 (11%) reported low trust and a similar proportion (9%) was unsure.

Lastly, restaurants received high ratings of trust from over a quarter of respondents (28%) and over a half (53%) reported moderate trust. Less than a fifth (17%) reported low trust while a small proportion (2%) were unsure.

Figure 36. Trust in various locations that sell fish products



QFF11. To what extent do you trust the following types of locations when it comes to the fish they sell? Base: Respondents that eat or buy fish, n=1,272.

Key segments

Across sub-segments, those more likely to report high trust in grocery stores when it comes to the fish they sell included:

- Male respondents compared to female respondents (34% versus 28%)
- Non-Indigenous respondents compared to those who identified as Indigenous (31% versus 20%)
- Respondents with a household income of more than $80k compared to those with a household income of less than $40k (34% versus 26%)
- Respondents who reported being very familiar with the CFIA (47%) compared to those who reported being somewhat familiar (31%) or not very familiar (28%)
- Respondents who reported being not very concerned with food fraud (46%) compared to those who reported moderate concern (24%) or a great deal of concern (27%)

Those more likely to report high trust in fish mongers when it comes to the fish they sell included:

- Respondents living in Quebec compared to those living in regions outside of Quebec (46% versus 22%)
- Non-Indigenous respondents compared to those who identified as Indigenous (28% versus 16%)

- Respondents with a household income of more than $80k (31%) compared to those with a household income of less than $80k (24%)
- Respondents who reported being very familiar with the CFIA (43%) compared to those who reported being somewhat familiar (29%) or not very familiar (24%)
- Respondents who speak French at home (51%) compared to those who speak English (21%) or another language other than English or French (23%)

Those more likely to report high trust in local markets when it comes to the fish they sell included:

- Respondents living in Atlantic Canada compared to those living in regions outside of Atlantic Canada (39% versus 26%)
- Respondents with a household income of more than $80k compared to those with a household income of less than $40k (29% versus 22%)
- Respondents who reported being very familiar with the CFIA (43%) compared to those who reported being somewhat familiar (26%) or not very familiar (25%)
- Respondents who reported being not very concerned with food fraud (35%) compared to those who reported moderate concern (22%) or a great deal of concern (27%)

Those more likely to report high trust in restaurants when it comes to the fish they sell included:

- Non-Indigenous respondents compared to those who identified as Indigenous (25% versus 11%)
- Respondents with a household income of more than $80k compared to those with a household income of less than $40k (28% versus 19%)
- Respondents who reported being not very concerned with food fraud (33%) compared to those who reported moderate concern (20%) or a great deal of concern (21%)

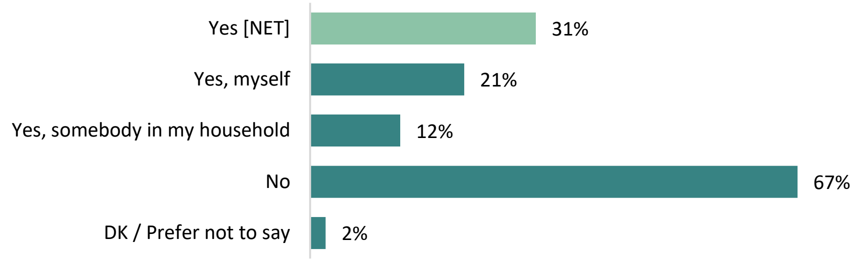
Additional analysis

Food allergy and sensitivity

For research analysis purposes, respondents were asked whether themselves or anyone in their household had any food allergies or sensitivities.

Overall, more than 3 in 10 respondents (31%) reported a food allergy or sensitivity in their household.

Figure 37. Food allergies or sensitivities in the household



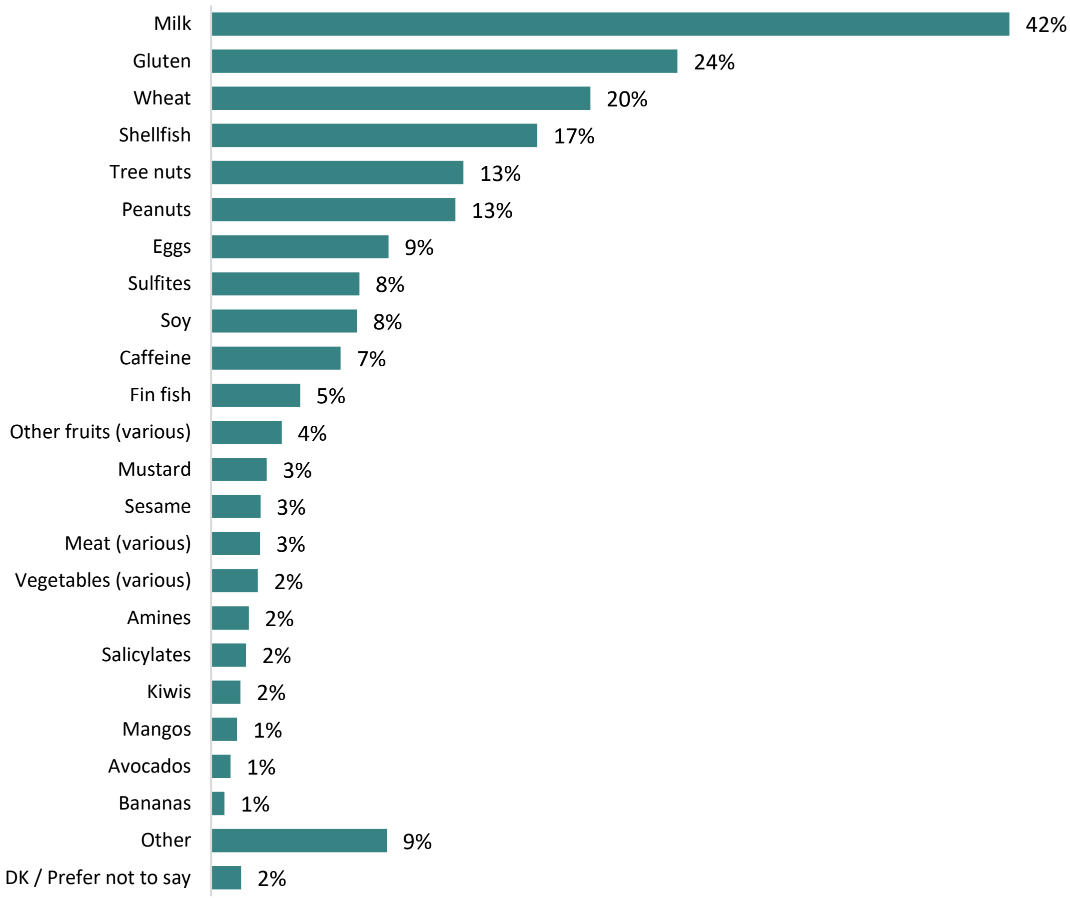
QA1. Do you have any food allergies or sensitivities? Base: All respondents, n=1,503.

Those with a food allergy or sensitivity in their household were asked to specify the food(s) to which there was an allergy or sensitivity.

Of those with a food allergy or sensitivity in their household, the most common food allergies/sensitivities were to milk (42%), gluten (24%), wheat (20%), shellfish (17%), tree nuts (13%), and peanuts (13%).

Other food sensitivities and allergies included: eggs (9%), sulfites (8%), soy (8%), caffeine (7%), fin fish (5%), fruits (5%), mustard (3%), sesame (3%), meats (3%), vegetables (2%), amines (2%), salicylates (2%), kiwis (2%), mangos (1%), avocados (1%), and bananas (1%).

Figure 38. Types of food allergies or sensitivities



QA2. Please select all foods to which you or someone in your household has allergies or sensitivities: Base: Respondents with a food allergy or sensitivity, n=464.

Quantitative research results – food business survey

Awareness of food safety regulations

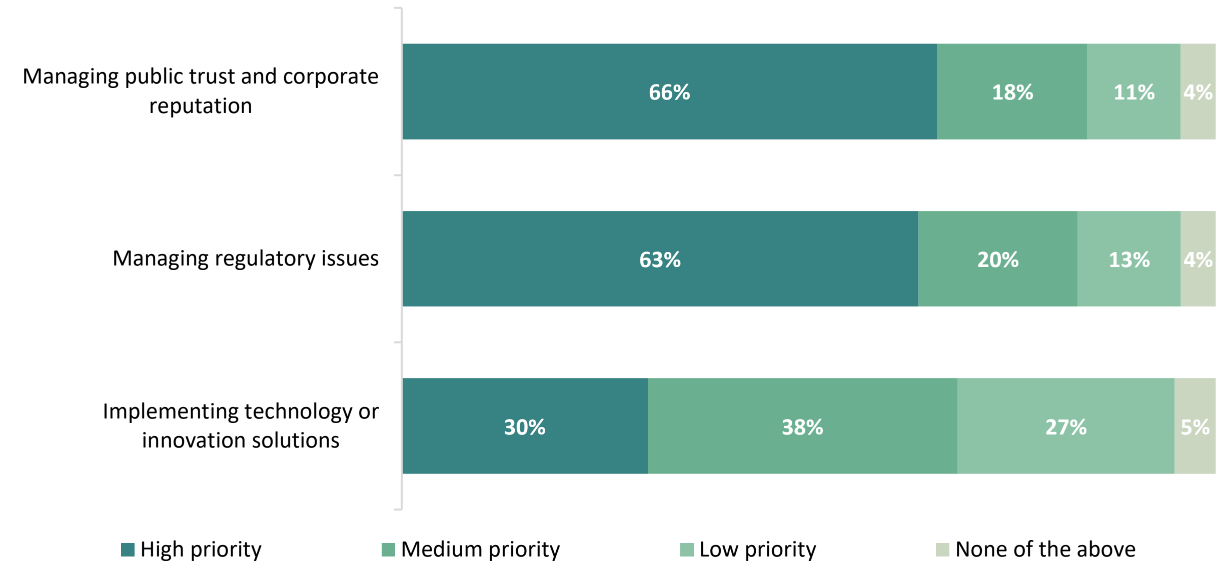
Business representatives were asked the extent to which three specific areas were priorities over the last couple of years.

Two thirds of business representatives (66%) reported managing public trust and corporate reputation as a high priority. Nearly a fifth (18%) reported that managing public trust and corporate reputation was a medium priority while fewer (11%) said it was a low priority.

Similar results were obtained when it comes to managing regulatory issues. This was seen as a high priority for 63% of businesses, a medium priority for 20% and a low priority for 13% of respondents.

Implementing new technology or innovative solutions was a high priority for nearly a third of businesses (30%) and a medium priority for a slightly larger number of businesses (38%). On the other hand, this was a low priority for 27% of businesses.

Figure 39. Priorities among food businesses



Q1AA. Thinking about the past two years, have the following been high, medium, or low priority for your company? Base: All respondents, n=850.

Key findings

Across sub-segments, those more likely to report that managing public trust and corporate reputation was a high priority included:

- Business representatives from Quebec (81%) compared to those in Ontario (62%), Atlantic Canada (59%) and Western Canada (56%)

- Retailers (73%) compared to businesses in agriculture (55%) or wholesalers/distributors (55%)
- Large businesses compared to micro businesses (74% versus 59%)

Those more likely to report that managing regulatory issues was a high priority included:

- Business representatives from Quebec (76%) compared to those in Ontario (62%), Atlantic Canada (54%) and Western Canada (54%)
- Processors/manufacturers compared to businesses in agriculture (69% versus 58%)
- Large (78%) and medium sized businesses (70%) compared to small (61%) or micro businesses (49%)

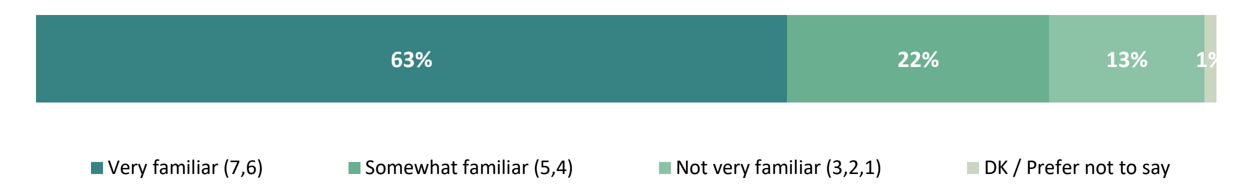
Those more likely to report that implementing technology or innovative solutions was a high priority included:

- Large (49%) or medium sized businesses (35%) compared to small (25%) or micro businesses (22%)

Business representatives were asked to rate their familiarity with the activities of the CFIA. A 7-point scale was used with 7 representing “very familiar” and 1 representing “not at all familiar”.

Nearly two thirds of businesses (63%) reported being very familiar (scores of 6 or 7) with the CFIA while another 22% were somewhat familiar (scores of 4 or 5). A smaller proportion (13%) were not very familiar (scores of 1, 2 or 3).

Figure 40. Familiarity with CFIA



QAA1. How familiar would you say your company is with the activities of the Canadian Food Inspection Agency? Base: All respondents, n=850.

Key findings

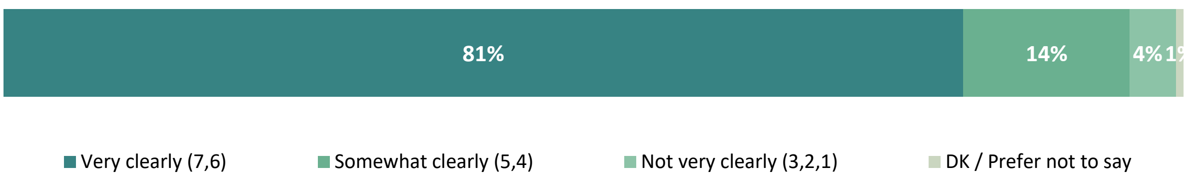
Across sub-segments, those more likely to report being very familiar with the CFIA included:

- Businesses in Ontario (70%) compared to those in Western Canada (58%) or Quebec (57%)
- Processors/manufacturers (76%), wholesalers/distributors (66%) and retailers (64%) compared to businesses in agriculture (47%)
- Familiarity with CFIA increased with business size, highest among large businesses (86%) compared to medium (71%), small (59%), or micro businesses (45%)

Business representatives were asked how well they understand the food safety regulations that apply to their business. A 7-point scale was used with 7 representing “very clear” and 1 representing “not at all clear”.

Roughly 4 in 5 (81%) believe they clearly understand the food safety regulations that apply to their business (scores of 6 or 7). An additional 14% would say they understand the applicable regulations somewhat well (scores or 4 or 5) while just 4% reported a low level of understanding (scores of 1, 2 or 3).

Figure 41. Understanding of applicable food safety regulations



QA1. On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your business? Base: All respondents, n=850.

Key findings

Across sub-segments, businesses more likely to report very clearly understanding the food safety regulations applicable to their business included:

- Processors/manufacturers (87%), retailers (86%) and wholesalers/distributors (78%) compared to businesses in agriculture (66%)
- Retailers compared to wholesalers/distributors (86% versus 78%)
- Large (93%), medium (87%) and small businesses (82%) compared to micro businesses (67%)

Two thirds of business representatives (66%) had recently seen, heard, or read something about the Safe Food for Canadians Regulations (SFCR) while less than a third had not (31%). Another 3% of business representatives were unsure.

Figure 42. Seen, read, or heard anything about SFCR

QA2. Have you seen, read or heard anything about the Safe Food for Canadians Regulations? Base: All respondents, n=850.

Key findings

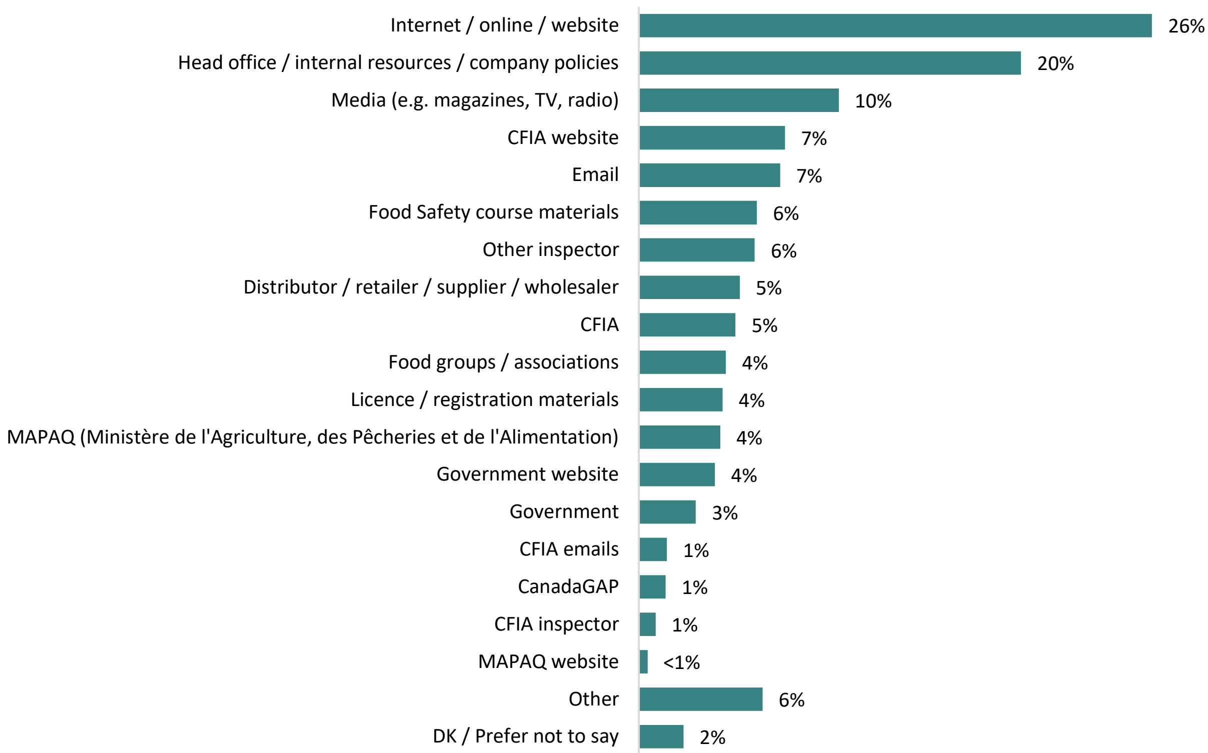
Across sub-segments, businesses more likely to have seen, read or heard something about the SFCR included:

- Business representatives from Quebec (81%) compared to those from Ontario (61%), Atlantic Canada (56%) or Western Canada (55%)
- Processors/manufacturers (84%) and wholesalers/distributors (80%) compared to retailers (62%) and businesses in agriculture (54%)
- Medium (72%) and small businesses (69%) compared to micro businesses (56%)
- Medium sized businesses (72%) compared to large businesses (57%)

When asked where they might have recently heard, seen, or read something about SFCR, just over a quarter of aware business representatives (26%) cited the internet while a fifth (20%) cited internal resources such as through head office or company policies. Another 15% cited the CFIA (CFIA website, 7%; CFIA, general, 5%; CFIA emails, 1%; CFIA inspector, 1%) while 10% cited media such as magazines, TV or radio.

Fewer cited email (general, 7%), food safety course materials (6%), an inspector (6%), a distributor, retailer, supplier or wholesaler (5%), food associations (4%), licensing or registration materials (4%), MAPAQ (4%), government websites (4%), the government (general, 3%) CanadaGAP (1%) or the MAPAQ website (1%). Another 2% of business representatives could not recall where they had heard, seen, or read about the regulations.

Figure 43. Channels of information surrounding regulations



QA3. Where did you hear, see or read about the regulations? Base: Businesses that have seen, read or heard about the Safe Food for Canadians Regulations, n=574.

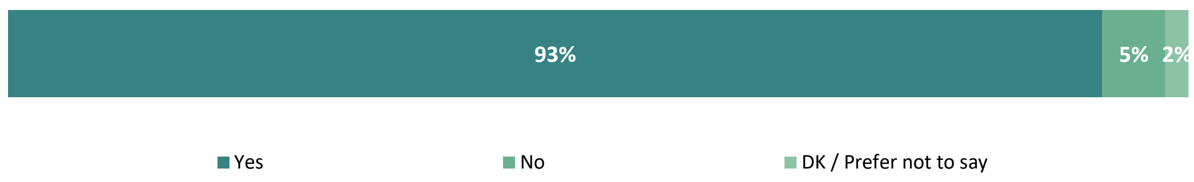
Key findings

Across sub-segments, the following differences were found:

- Retailers (29%) were more likely to cite head office compared to processors/manufacturers (12%), wholesalers/distributors (10%) and businesses in agriculture (6%)
- Those in Ontario (10%) were more likely to mention food groups/associations compared to those in Quebec (3%), Western Canada (1%) and Atlantic Canada (0%),
- Those in Quebec (12%) were more likely to cite MAPAQ compared to those in other regions (0%)

Most business representatives familiar with the SFCR believed that the SFCR applied to their business (93%).

Figure 44. Perceived relevance of new regulations



QA4. As far as you know, do you think the new Safe Food for Canadians Regulations will apply to your business? Base: Businesses that have seen, read or heard about the Safe Food for Canadians Regulations, n=574.

Of those familiar with the SFCR, 72% of business representatives believed that the SFCR applied to online sales of food products. On the other hand, 10% did not believe that the SFCR applied to online sales of food products while 18% were unsure.

Figure 45. Perceived relevance of SFCR for online sales

QA5. As far you know do you think the Safe Food for Canadians Regulations apply to on-line sales of food products? Base: Businesses that have seen, read or heard about the Safe Food for Canadians Regulations, n=574.

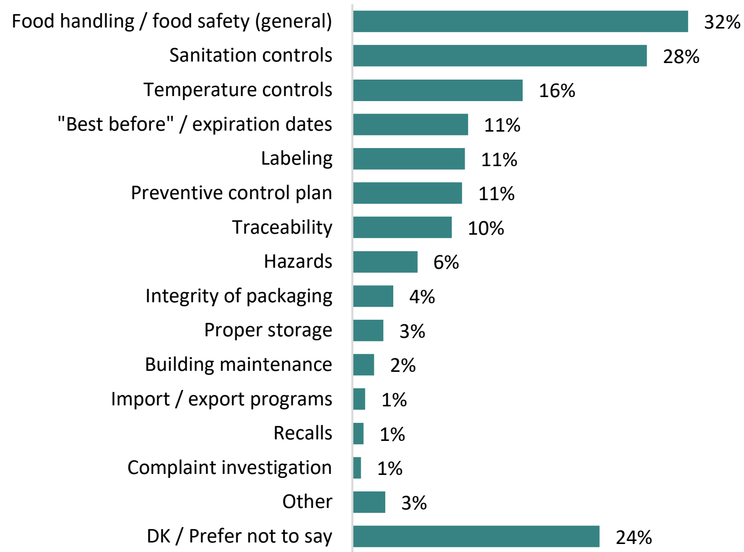
Without being provided with a list of options, business representatives who were familiar with the SFCR were asked what they believed were the key safety requirements within these regulations.

Safety requirements mentioned most frequently included general food handling or food safety (32%), sanitation controls (28%), temperature controls (16%), “best before” or expiration dates (11%), labeling (11%), preventative control plans (11%) and traceability (10%).

Fewer mentioned hazards (6%), integrity of packaging (4%), proper storage (3%), building maintenance (2%), import or export programs (1%), recalls (1%) or complaint investigations (1%), among others.

Nearly a quarter of respondents (24%) were unsure of the key safety requirements in the SFCR.

Figure 46. Unaided awareness of key safety requirements in the SFCR

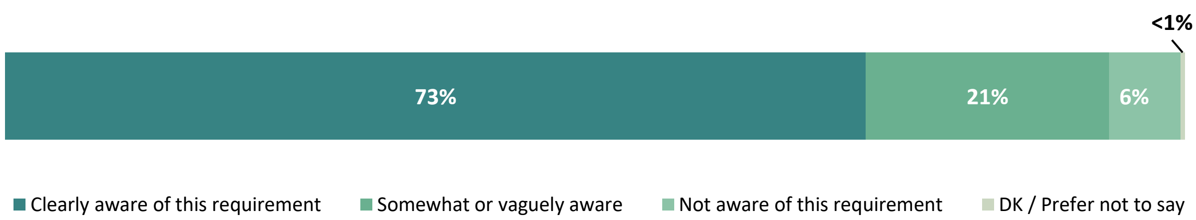


QA5A. To the best of your knowledge what are the key safety requirements in the SFCR? Base: Businesses that have seen, read or heard about the Safe Food for Canadians Regulations, n=574.

Business representatives familiar with the SFCR were asked whether they were aware that the licence is required to import food products into Canada.

Nearly three quarters of familiar respondents (73%) reported being clearly aware of this requirement while 21% were somewhat or vaguely aware. Conversely, 6% were not aware of this requirement.

Figure 47. Awareness of Safe Food for Canadians licence requirement



QA6. Were you aware that a Safe Food for Canadians licence is required to import food products into Canada? Would you say you were… Base: Businesses that have seen, read or heard about the Safe Food for Canadians Regulations and import food products, n=176.

Key findings

Across sub-segments, businesses more likely to be clearly aware that a SFCR licence is required to import food products into Canada included:

- Business representatives from Western Canada (79%), Ontario (76%) and Quebec (68%), compared to those from Atlantic Canada (22%)

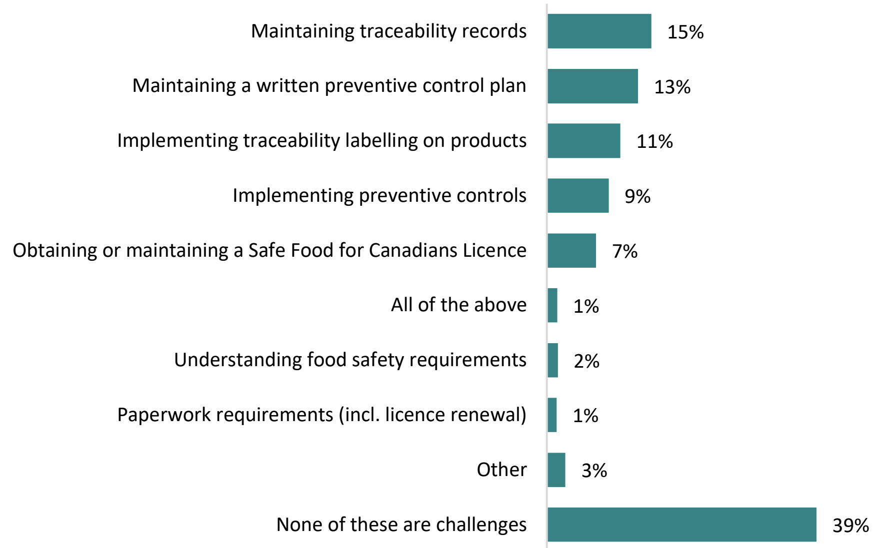
- Processors/manufacturers (88%), wholesalers/distributors (88%) and businesses in agriculture (75%) compared to retailers (43%)
- Small (80%) and medium sized businesses (77%) compared to large businesses (49%)

Business representatives familiar with the SFCR were asked which food safety requirements within the SFCR were the biggest challenge for their business. A specific list of food safety requirements was provided to respondents.

Maintaining traceability records was the biggest challenge for 15% of respondents while slightly fewer cited maintaining a written preventative control plan (13%) or implementing traceability labelling on products (11%). Less than 1 in 10 felt their biggest challenge was implementing preventative controls (9%) or obtaining/ maintaining the SFCR licence (7%). Another 1% cited all of these food safety requirements as challenges.

Just under two fifths (39%) felt that none of the requirements were challenges for their business.

Figure 48. Challenges meeting food safety requirements of the SFCR



QA7. From your perspective, which of the following food safety requirements of the SFCR is your biggest challenge? Would it be..? Base: Businesses that have seen, read or heard about the Safe Food for Canadians Regulations and are not retail only, n=386.

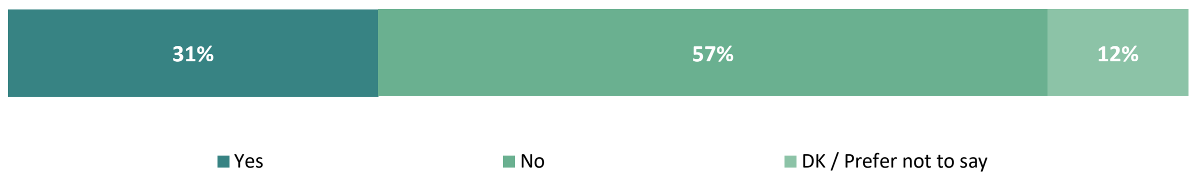
Key findings

- Micro (11%), small (10%) and medium sized businesses (5%) were more likely to cite obtaining or maintaining a SFCR licence compared to large businesses (0%)
- Those in Western Canada (17%), Quebec (8%) and Ontario (8%) were more likely to say implementing preventative controls was a challenge compared to those in Atlantic Canada (0%)

- Those in Quebec (52%) were more likely to say that none of these actions were considered challenges compared to those in Ontario (35%), Western Canada (25%) and Atlantic Canada (23%)

Nearly a third of business representatives (31%) reported that their business uses a private food safety or quality control certification system such as the Global Food Safety Initiative (GFSI), the International Organization for Standardization (ISO) or the Quality Management Program (QMP). Conversely, 57% did not use a private food safety or quality control certification system while 12% were unsure.

Figure 49. Use of private certification systems



QA8. Do you use a private food safety or quality control certification system such as GFSI, ISO or QMP? Base: All respondents, n=850.

Key findings

Across sub-segments, businesses more likely to have a private food safety or quality control certification system included:

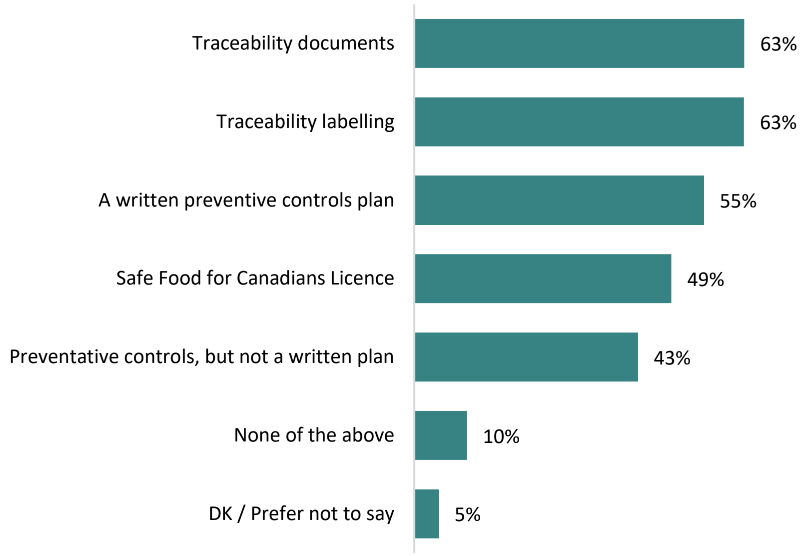
- Those in Ontario (36%) compared to those in Western Canada (25%)
- Processers/manufacturers (48%) and wholesalers/distributors (38%) compared to retailers (28%) and businesses in agriculture (27%)
- Large (49%) and medium sized businesses (42%) compared to small (20%) and micro businesses (17%)

Business representatives were asked which preventative control measures were currently being used by their business.

Nearly two thirds reported using traceability documents (63%) or traceability labelling (63%) while more than half (55%) used a written preventative controls plan. Nearly half (49%) cited having a SFCR licence while slightly fewer had preventative controls in place, but not a written plan (43%).

An additional 10% were not using any of the listed preventative control measures, while 5% were unsure.

Figure 50. Preventative control measures used by businesses



QA9. Which of the following items, if any, does your company have? [SELECT ALL THAT APPLY] Base: All respondents, n=850.

Key findings

The following sub-segments were more likely to report having a Safe Food for Canadians Licence:

- Respondents in Quebec (63%) compared to those in Atlantic Canada (47%), Western Canada (44%) and Ontario (40%)
- Large (54%), medium (58%), or small businesses (49%), compared to micro businesses (31%)

The following sub-segments were more likely to report that their business has a written preventative controls plan:

- Processors/manufacturers (77%) compared to wholesalers/distributers (63%), retailers (51%) and businesses in agriculture (45%),
- Large (70%), medium (68%) and small businesses (50%) compared to micro businesses (34%)

The following sub-segments were more likely to report that their business has traceability documents:

- Processors/manufacturers (83%) compared to businesses in agriculture (70%), wholesalers/distributers (68%) and retailers (54%)
- Medium (72%) and large sized businesses (70%) compared to micro (54%) and small businesses (53%)

The following sub-segments were more likely to report that their business has traceability labelling:

- Processors/manufacturers (81%) compared to wholesalers/distributers (70%), retailers (59%) and businesses in agriculture (53%)
- Large (72%), medium (74%) and small businesses (61%) compared to micro businesses (43%)

The following sub-segments were more likely to report that their business does not have any of these measures in place:

- Businesses in agriculture (16%) compared to wholesalers/distributors (6%) and processors/manufacturers (3%)
- Retailers (11%) compared to processors/manufacturers (3%)
- Micro businesses (20%) compared to small (11%) medium (5%) and large businesses (5%)

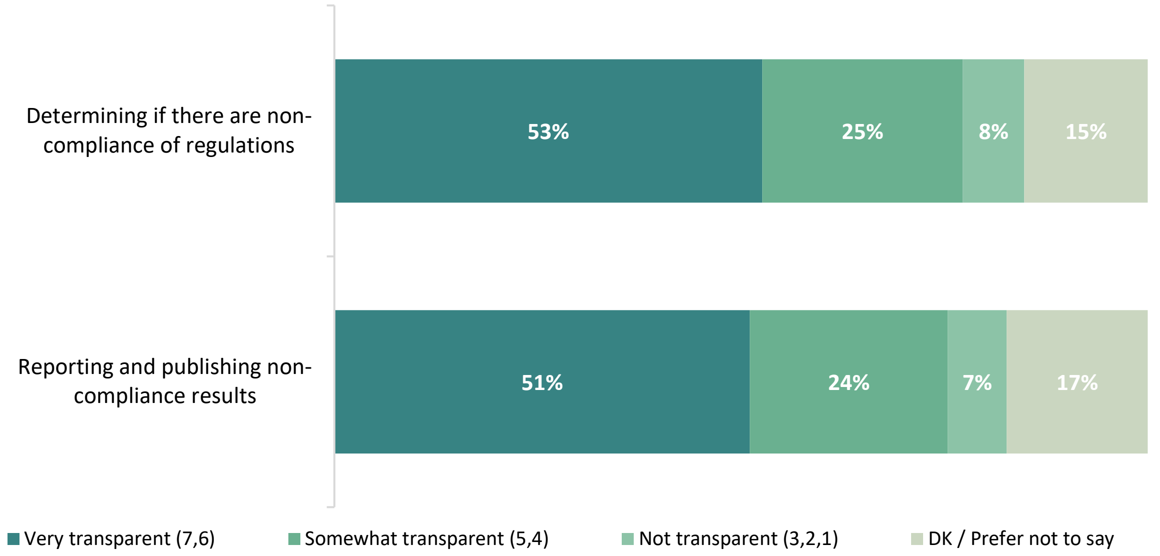
Transparency

Respondents were asked to rate how transparent they believe the CFIA is when it comes to various situations. A 7-point scale was used with 7 representing "very transparent" and 1 representing "not at all transparent".

More than half of business representatives (53%) viewed the CFIA as very transparent (scores of 6 or 7) when it comes to determining if there are non-compliance of regulations while another quarter (25%) felt the CFIA was somewhat transparent (scores of 4 or 5) in this regard. Conversely, 8% believed the CFIA was not very transparent (scores of 1, 2 or 3) and another 15% were unsure.

Just over half (51%) felt that the CFIA was very transparent when it comes to reporting and publishing non-compliance results while nearly a quarter (24%) believed the CFIA was somewhat transparent in this regard. On the other hand, 7% viewed the CFIA as not very transparent and another 17% were unsure.

Figure 51. Transparency of the CFIA



QT1-2. In your opinion, how transparent do you think the CFIA is when it comes to each of the following? Please answer on a scale of 1 to 7, with 1 being not at all transparent, and 7 being very transparent. Base: Businesses who are familiar with the activities of CFIA, n=744.

Key findings

Across sub-segments, businesses more likely to believe that the CFIA is very transparent when it comes to determining if there are non-compliance of regulations included:

- Processors/manufacturers (62%) compared to wholesalers/distributors (47%) and businesses in agriculture (41%)
- Retailers (56%) compared to businesses in agriculture (41%)
- Large (63%), medium (57%) and small businesses (53%) compared to micro businesses (38%)

Businesses more likely to believe that the CFIA is very transparent when it comes to reporting and publishing non-compliance results included:

- Processors/manufacturers (60%) compared to wholesalers/distributors (48%) and businesses in agriculture (33%)
- Retailers (56%) compared to businesses in agriculture (33%)
- Large (63%) and medium sized businesses (55%) compared to micro businesses (39%)

“Best before” dates

Business representatives were asked a series of questions related to “best before” dates on food product packaging.

Nearly half (46%) reported that their business benefits from "best before" date requirements while a slightly larger proportion (48%) said their business did not benefit from these labelling requirements. Another 5% were unsure.

Figure 52. Benefits of "best before" date requirements

QB1. Does your business experience any benefit from best before date requirements? Base: All respondents, n=850.

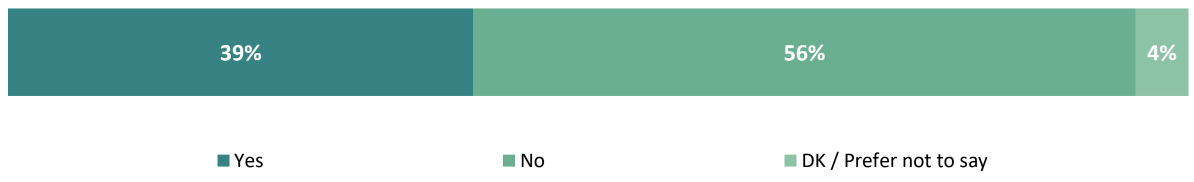
Key findings

Across sub-segments, businesses more likely to have experienced any benefits from "best before" date requirements included:

- Retailers (55%), processors/manufacturers (49%) and wholesalers/distributors (45%) compared to businesses in agriculture (19%)
- Retailers (55%) compared to wholesalers/distributors (45%)
- Large (56%), medium (51%) and small businesses (46%) compared to micro businesses (35%)

Nearly two fifths (39%) reported that their business experiences negative impacts from "best before" date requirements. Conversely, more than half (56%) reported that their business did not experience any negative impacts from these requirements and another 4% were unsure.

Figure 53. Negative impacts of "best before" date requirements



QB2. Does your business experience any negative impacts from best before date requirements? Base: All respondents, n=850.

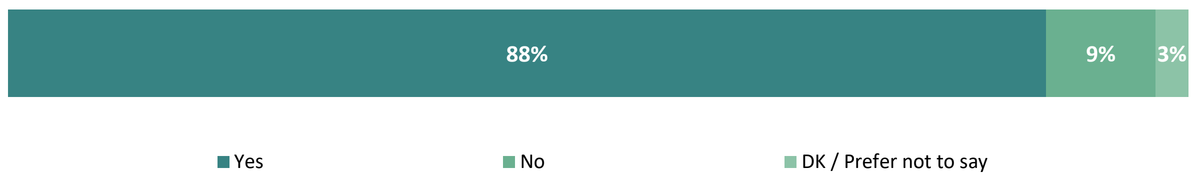
Key findings

Across sub-segments, businesses more likely to have experienced negative impacts from "best before" date requirements included:

- Retailers (52%), wholesalers/distributors (43%) and processors/manufacturers (29%) compared to businesses in agriculture (8%)
- Retailers (52%) and wholesalers/distributors (43%) compared to processors/manufacturers (29%)
- Large (50%) and medium businesses (46%) compared to small (35%) and micro businesses (28%)

A large majority of business representatives (88%) believed that there is a connection between "best before" dates and food waste.

Figure 54. Connection between "best before" dates and food waste



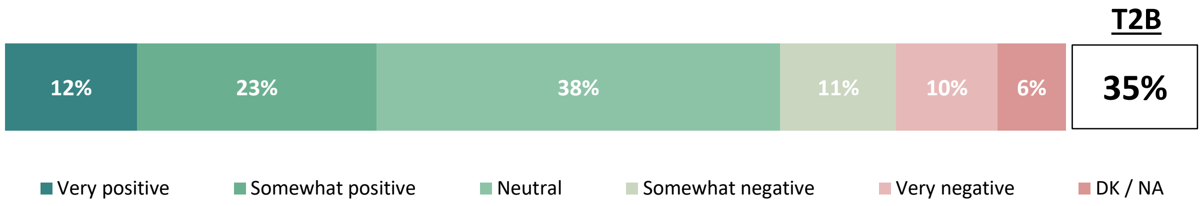
QB3. Do you believe there is a connection between best before dates and food waste? Base: All respondents, n=850.

Respondents were asked to consider the impacts on their business if the requirement for "best before" dates was to be eliminated.

Overall, more than one third (35%) perceived that an elimination of "best before" dates would have a positive impact on their business (12% reported a very positive impact while 23% reported a somewhat positive impact). A slightly larger proportion (38%) felt this change would have a neutral impact on their business.

Conversely, more than 1 in 10 (11%) perceived that the elimination of "best before" dates would have a somewhat negative impact on their business and a similar proportion (10%) perceived a very negative impact. Another 6% were unsure.

Figure 55. Impact of eliminating “best before” dates



QB5. If the requirement to have best before dates was eliminated, would the impact on your business be very negative, somewhat negative, neutral, somewhat positive, or very positive? Base: All respondents, n=850.

Key findings

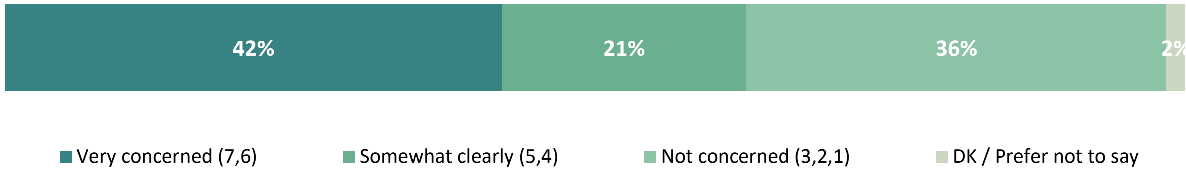
- Retailers (45%) were more likely to believe that eliminating “best before” date requirements would have a somewhat positive or very positive impact on their business compared to wholesalers/distributors (33%), processors/manufacturers (25%) and businesses in agriculture (15%)

Food fraud

Business representatives were asked about their level of concern with food fraud. A 7-point scale was used with 7 representing “very concerned” and 1 representing “not at all concerned”.

More than two fifths (42%) reported being very concerned with food fraud (scores of 6 or 7) while another 21% reported being somewhat concerned (scores of 4 or 5). Conversely, 36% were not very concerned with food fraud (scores of 1, 2 or 3) and another 2% were unsure.

Figure 56. Level of concern with food fraud



QFF1. As a food business, how concerned are you with food fraud? Please use a number between 1 and 7, where 1 means “not at all concerned” and 7 means “very concerned. Base: All respondents, n=850.

Key findings

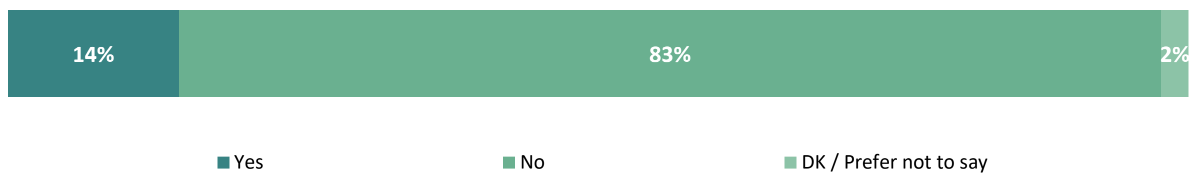
Across sub-segments, businesses more likely to report being very concerned with food fraud included:

- Those in Quebec (48%) compared to those in Western Canada (35%)

- Micro (42%), small (48%) and medium sized businesses (42%) compared to large businesses (27%)

A minority of food businesses (14%) reported being affected by food fraud.

Figure 57. Businesses affected by food fraud



QFF2. Has food fraud affected your business? Base: All respondents, n=850.

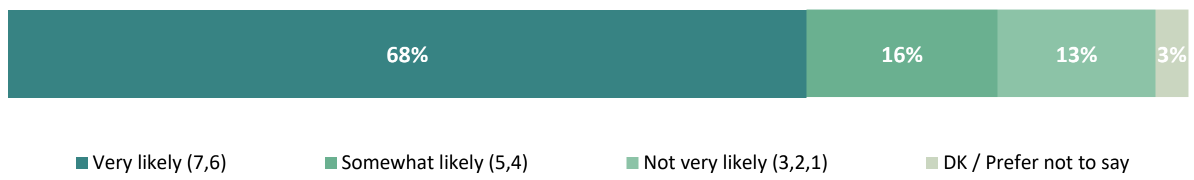
Key findings

- Those in Quebec (16%) or Ontario (16%) were more likely to report that food fraud has affected their business compared to those in Atlantic Canada (7%)

Respondents were asked how likely they would be to report to the CFIA if they suspected a fellow industry member was committing food fraud. A 7-point scale was used with 7 representing "very likely" and 1 representing "not at all likely".

More than two thirds (68%) reported being very likely (scores of 6 or 7) to report a fellow industry member of suspected food fraud to the CFIA while another 16% would be somewhat likely to report them (scores of 4 or 5). Conversely, 13% reported being not very likely to report suspected food fraud to the CFIA (scores of 1, 2 or 3) and another 3% were unsure.

Figure 58. Likelihood of reporting suspected food fraud to the CFIA



QFF3. If you suspected a fellow industry member was committing food fraud, how likely would you be to report it to the CFIA? Please use a number between 1 and 7, where 1 means "not at all likely" and 7 means "very likely". Base: All respondents, n=850.

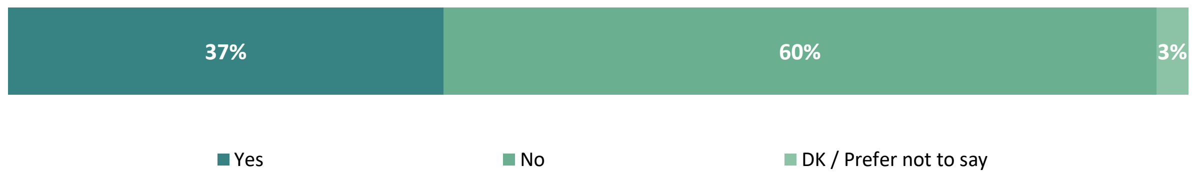
Key findings

Across sub-segments, businesses more likely to report that they would be very likely to report to the CFIA if they suspected that a fellow industry member was committing food fraud included:

- Those in Western Canada (72%) or Ontario (69%) compared to those in Quebec (60%)
- Retailers (74%), processors/manufacturers (70%) and wholesalers/distributors (70%) compared to businesses in agriculture (46%)
- Large (77%) and medium sized businesses (71%) compared to micro businesses (59%)

When asked if they knew how to report suspected food fraud to the CFIA, more than one third of business representatives (37%) indicated they knew how to do so. On the other hand, 60% did not know how to report suspected food fraud and another 3% were unsure.

Figure 59. Knowledge of how to report food fraud



QFF4. Do you know how to report suspected food fraud to the CFIA? Base: All respondents, n=850.

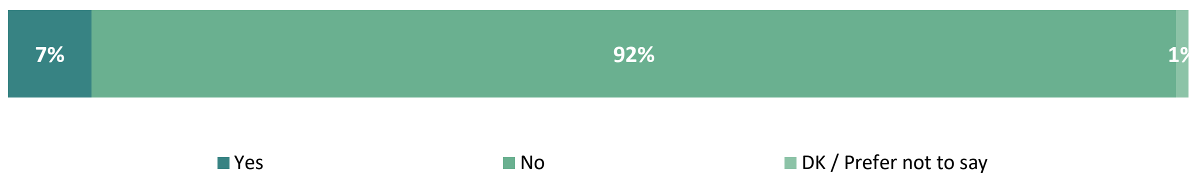
Key findings

Across sub-segments, businesses more likely to know how to report suspected food fraud included:

- Those in Ontario (46%) compared to those in Quebec (32%) or Western Canada (26%)
- Processors/manufacturers (55%) compared to wholesalers/distributors (43%), retailers (33%) or businesses in agriculture (33%)
- Wholesalers/distributors (43%) compared to retailers (33%)
- Large businesses (47%) compared to micro businesses (33%)

Less than 1 in 10 (7%) reported that their business had received consumer complaints related to food fraud or misrepresented food.

Figure 60. Incidence of customer complaints related to food fraud



QFF5. Have you received consumer complaints (whether they were well founded or not) related to food fraud or misrepresented food? Base: All respondents, n=850.

Key findings

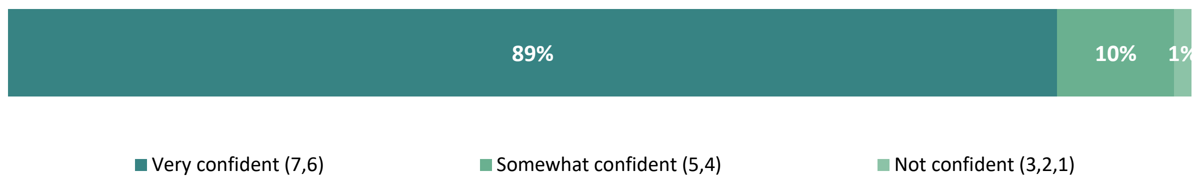
Across sub-segments, businesses more likely to have received consumer complaints related to food fraud or misrepresented food included:

- Those in Ontario (11%) compared to those in Western Canada (5%) or Quebec (4%)
- Large businesses (13%) compared to micro (5%) or small businesses (4%)

Businesses that identified as retail only or specified that they deal with fish were asked to provide their level of confidence in the labelling for type of fish in the seafood products that they sell. A 7-point scale was used with 7 representing "very confident" and 1 representing "not at all confident". Among these businesses, 19% specified that they did not sell fish or seafood.

When adjusting for businesses that did sell fish or seafood products, the majority (89%) reported being very confident that the fish or seafood products that they sell are properly labelled for the type of fish that they are (scores of 6 or 7). Another 10% were somewhat confident (scores of 4 or 5) while 1% were not confident (scores of 1, 2 or 3).

Figure 61. Confidence in seafood product labels



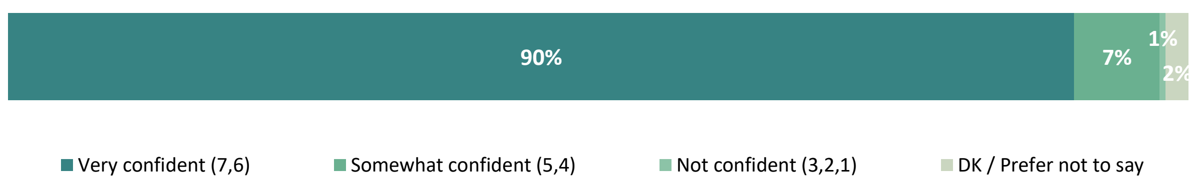
QFF6. How confident are you that the fish and seafood products you sell are properly labelled for type of fish when it comes to the common name? Please use a number between 1 and 7, where 1 means "not at all confident" and 7 means "very confident". Base: Businesses that sell fish or seafood products, n=331.

Key findings

Businesses in Atlantic Canada (100%) were more likely to be very confident that the fish and seafood products they sell are properly labelled compared to those in Ontario (92%), Western Canada (84%) or Quebec (85%).

When considering all food products sold, a majority of respondents were very confident (scores of 6 or 7) that the food products they sell are properly labelled (90%). Another 7% reported being somewhat confident (scores of 4 or 5) and 1% were not very confident (scores of 1, 2 or 3). Another 2% were unsure.

Figure 62. Confidence in food product labels



QFF8. Considering all the food products you sell, how confident are you that they are properly labelled? Please use a number between 1 and 7, where 1 means "not at all confident" and 7 means "very confident". Base: All respondents, n=850.

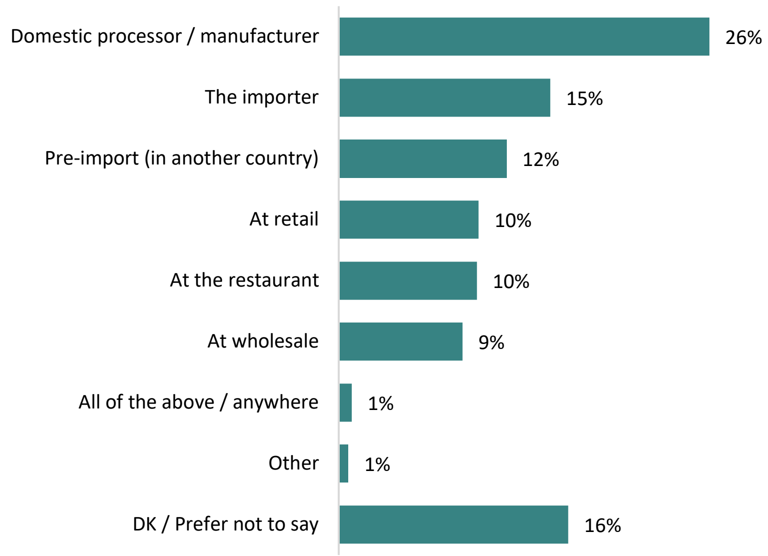
Key findings

Large (96%) and small businesses (92%) were more likely to be very confident that all food products they sell are properly labelled compared to micro businesses (86%).

Business representatives were asked at what step of the supply chain they suspected that food mislabelling of food products was most likely to occur.

The most commonly suspected source of mislabelling was the domestic processor/ manufacturer (26%). Fewer suspected the mislabelling happens from the importer (15%), pre-import in another country (12%), at retail (10%), at restaurants (10%), or at wholesale (9%). Many (16%) were unsure where mislabelling was most likely to occur.

Figure 63. Where in the supply chain businesses suspect food product mislabelling is most likely to occur



QFF9. At what step of the supply chain do you think mislabelling of food products is most likely to occur? Base: All respondents, n=850.

Key findings

Respondents who were more likely to believe that mislabelling occurs at the domestic processor/manufacturer included:

- Those in Atlantic Canada (47%), Western Canada (36%) or Ontario (27%) compared to those in Quebec (14%)
- Wholesalers/distributors (35%) and retailers (31%) compared to businesses in agriculture (14%) and processors/manufacturers (17%)

Respondents who were more likely to believe that mislabelling occurs at the importer included:

- Those in Quebec (19%) and Ontario (18%) compared to those in Western Canada (8%)
- Businesses in agriculture (22%) compared to retailers (14%) or wholesalers/distributors (9%)

Processors/manufacturers (14%), wholesalers/distributors (13%), and retailers (13%) were more likely to believe that mislabelling occurs pre-import in another country compared to businesses in agriculture (5%).

Processors/manufacturers (17%), businesses in agriculture (14%) and wholesalers/distributors (14%) were more likely to believe that mislabelling occurs at retail compared to retailers (6%).

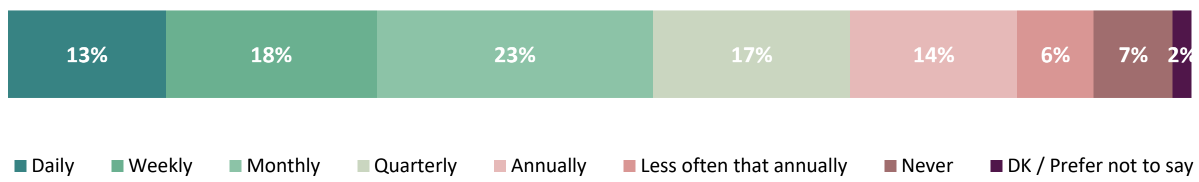
Processors/manufacturers (15%) were more likely to believe that mislabelling occurs at the restaurant compared to wholesalers/distributors (6%).

Information search and understanding

When business representatives were asked how often they look for information about food safety regulations or requirements of any kind, 13% reported doing so daily while nearly a fifth (18%) did so weekly. Nearly one quarter (23%) reported looking for this type of information monthly while fewer did so quarterly (17%) or annually (14%).

Conversely, 6% looked for information on food safety regulations or requirements less often than annually while another 7% reported never looking for this type of information. Another 2% were unsure.

Figure 64. Frequency of information search related to food safety regulations



QI1. How often do you look for information about food safety regulations or requirements of any kind? Would you say... Base: All respondents, n=850.

Key findings

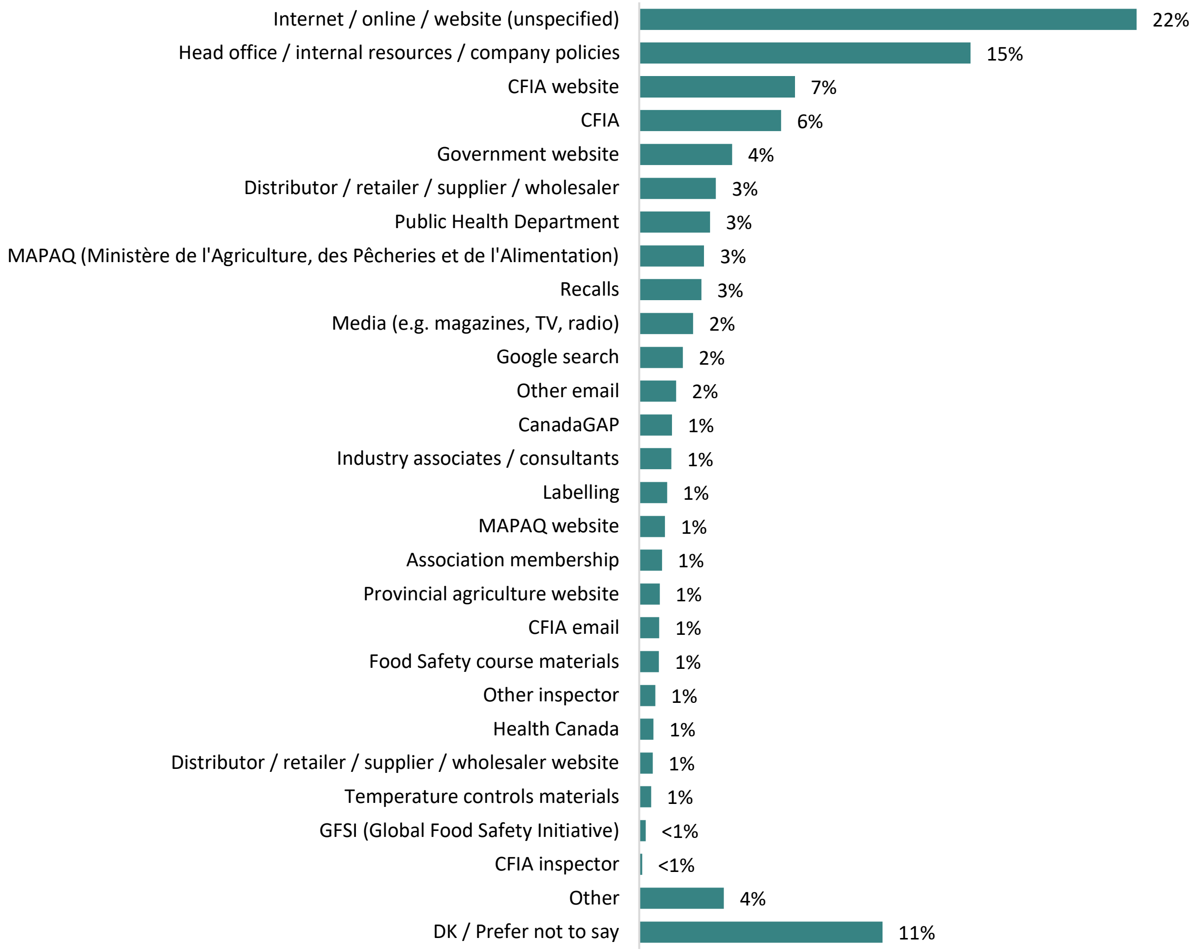
- Large businesses (24%) were more likely to report looking for information about food safety daily compared to small (13%) or micro businesses (4%)
- Businesses in agriculture (32%) were more likely to report looking for information about food safety annually compared to wholesalers/distributors (12%), processors/manufacturers (11%) and retailers (9%)
- Micro businesses (22%) were more likely to report looking for information about food safety annually compared to small (16%), medium (11%) and large businesses (4%)

When it comes to sources of information related to food safety regulations or requirements most often used, the internet is the most common choice (22%) followed by internal resources such as head office or company policies (15%).

Fewer reported using sources such as the CFIA website (7%), the CFIA (general, 6%), government websites (general, 4%), distributors, retailers, suppliers or wholesalers (3%), the Public Health Department (3%), MAPAQ (3%), recalls (3%), media such as magazines, television or radio (2%), Google searches (2%) or other emails (2%).

Roughly 1 in 10 (11%) were unsure of the specific sources of information used by their business.

Figure 65. Primary source of information for food safety regulations

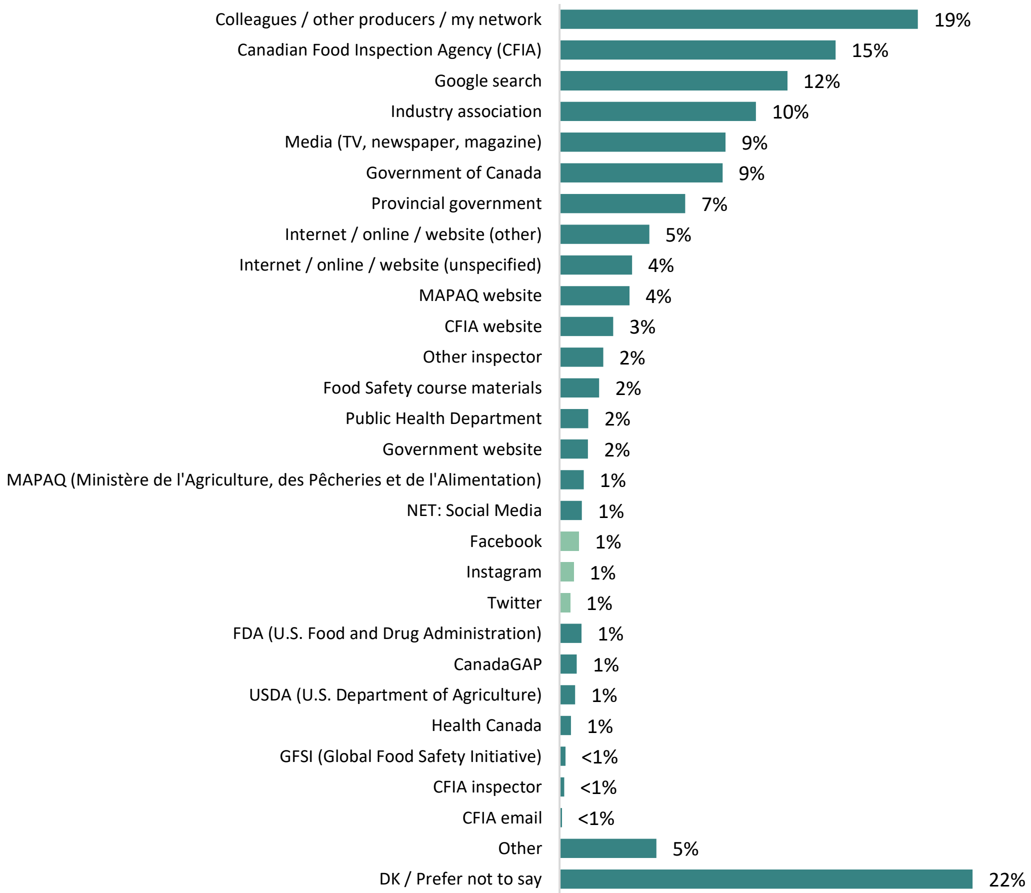


QI2. What specific source of information about food safety regulations or requirements do you go to most often? Base: All respondents, n=850.

When asked about other sources of information related to food safety used in the past, those most frequently mentioned included networks of colleagues/other food producers (19%), the CFIA (15%), Google searches (12%), industry associations (10%), media (9%), the Government of Canada (9%) and the Provincial government (7%).

Roughly a fifth (22%) were unsure which additional sources of information were used by their business.

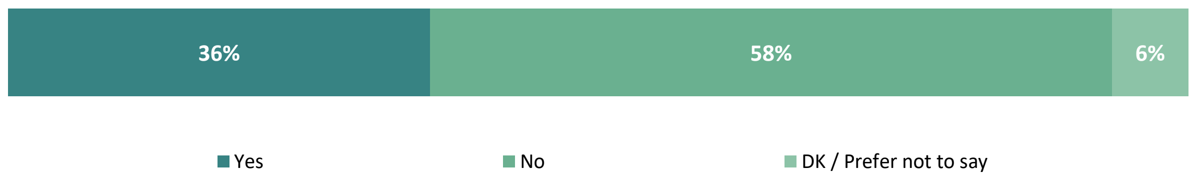
Figure 66. Additional sources of information for food safety regulations



QI3. What other sources or types of information about food safety regulations do you use or have you used in the past? Base: All respondents, n=850.

Business representatives were asked whether they had received any information from the CFIA within the past year. More than a third (36%) recalled receiving information from the CFIA while nearly 3 in 5 (58%) did not. Another 6% were unsure.

Figure 67. Receiving information from CFIA in the past year



QI4A. Have you received any information from the CFIA in the past year? Base: All respondents, n=850.

Key findings

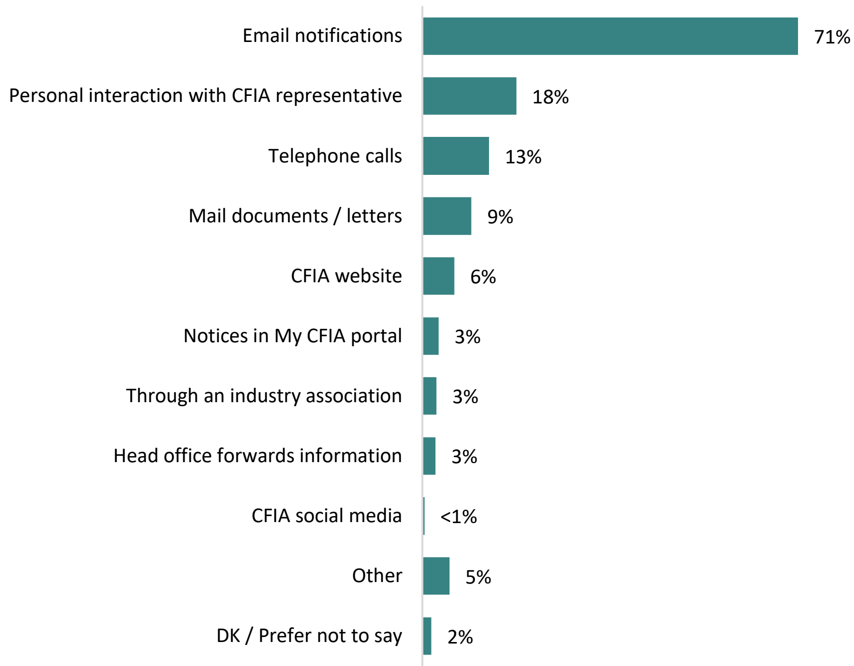
Across sub-segments, those more likely to report receiving information from the CFIA included:

- Those in Ontario (42%) and Western Canada (37%) compared to those in Quebec (25%)
- Processors/manufacturers (66%) and wholesalers/distributors (60%) compared to businesses in agriculture (31%) and retailers (24%)

Those who had received information from the CFIA within the past year were asked how they received this information. Most respondents (71%) reported receiving email notifications from the CFIA.

Nearly a fifth (18%) had a personal interaction with a CFIA representative while fewer cited telephone calls (13%), mailed documents (9%), the CFIA website (6%), notices in the MyCFIA portal (3%), information through an industry association (3%), information forwarded from head office (3%) or through CFIA's social media (<1%).

Figure 68. Source of information received from CFIA



QI4B. How has your business received information from the CFIA in the past year? Base: Businesses that received information from the CFIA in the past year, n=333.

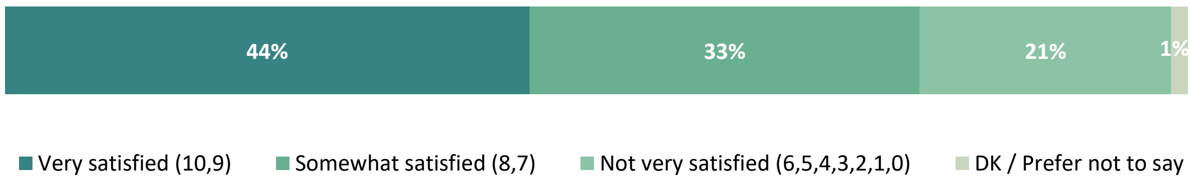
Key findings

- Wholesalers/distributors (88%), processors/manufacturers (80%) and businesses in agriculture (74%) were more likely to report receiving email notifications compared to retailers (54%)
- Those in Atlantic Canada (46%) were more likely to have received information from the CFIA through personal interaction with a CFIA representative compared to those in Ontario (16%) or Quebec (14%)
- Processors/manufacturers (31%) and businesses in agriculture (21%) were more likely to have received information from the CFIA through personal interaction with a CFIA representative compared to retailers (15%) or wholesalers/distributors (7%)
- Micro businesses (17%) were more likely to report receiving mailed documents/letters from the CFIA compared to large businesses (3%)

Those who had received information from the CFIA within the past year were asked to rate their satisfaction with these communications. An 11-point scale was used with 10 representing "very satisfied" and 0 representing "not at all satisfied".

More than 2 in 5 (44%) reported high satisfaction with CFIA communications (scores of 9 or 10) and another third (33%) reported moderate satisfaction (scores of 7 or 8). Conversely, a fifth (21%) reported low satisfaction with communications from the CFIA (scores of 6 or lower). Another 1% were unsure.

Figure 69. Satisfaction with communications received from CFIA



QI5. Overall, how satisfied are you with the communications you have received from CFIA? Please use a number between 0 and 10, where 0 means "not at all satisfied" and 10 means "very satisfied". Base: Businesses that received information from the CFIA in the past year, n=333.

Key findings

- Retailers (54%) were more likely to report being very satisfied with CFIA communications compared to processors/manufacturers (39%) and wholesalers/distributors (37%)

Respondents were then asked to provide a reason for their rating.

Those who provided a high satisfaction score (9 or 10) most frequently cited: no issues with communication and felt well-informed (51%), clear information (30%), responsive staff (19%), accessible communications (15%), timely updates (9%), and direct communications (8%).

Among those who provided a moderate satisfaction score (7 or 8), reasoning included a mix of positive feedback and areas for improvement. These respondents most often cited no issues with communications (17%), vague communications (13%), slow responses (13%), previous communication issues (12%), clear information (11%), and communications that are not direct (11%).

Those who provided lower satisfaction scores (6 or below) most often referred to vague communications (38%), previous communication issues or lack of information (23%), room for improvement (13%), slow responses (12%), and communications that are not direct (12%).

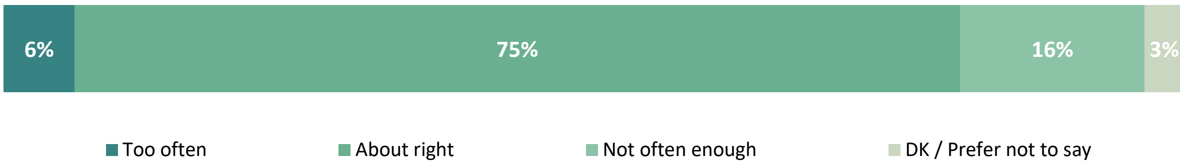
Figure 70. Reasons for satisfaction rating with communications received from CFIA

Among very satisfied businesses (satisfaction rating of 10,9)	(n=144)	Among somewhat satisfied businesses (satisfaction rating of 8,7)	(n=114)	Among dissatisfied businesses (satisfaction rating of 6,5,4,3,2,1,0)	(n=70)
Satisfied / no issues with communications / well-informed	51%	Satisfied / no issues with communications / well-informed	17%	Communications are not clear / vague	38%
Clear information	30%	Communications are not clear / vague	13%	Dissatisfied / experienced communications issues / not well-informed	23%
Responsive staff	19%	Staff is slow to respond	13%	There is always room for improvement	13%
Accessible communications	15%	Dissatisfied / experienced communications issues / not well-informed	12%	Staff is slow to respond	12%
Timely updates	9%	Clear information	11%	Communications are not direct	12%
Direct communications	8%	Communications are not direct	11%	Satisfied / no issues with communications / well-informed	6%
Dissatisfied / experienced communications issues / not well-informed	2%	There is always room for improvement	10%	Communications are not proactive	4%
There is always room for improvement	1%	Communications are not proactive	8%	Direct communications	1%
Communications are not clear / vague	1%	Accessible communications	7%	Responsive staff	1%
Staff is slow to respond	1%	Timely updates	5%	Other	1%
Communications are not direct	1%	Direct communications	3%	DK / Prefer not to say	10%
Communications are not proactive	1%	Responsive staff	1%		
Other	1%	Other	7%		
DK / Prefer not to say	5%	DK / Prefer not to say	7%		

Why do you give CFIA a rating of [PIPE RESPONSE FROM I5] out of 10 for its communications with you? Base: Businesses that received information from the CFIA in the past year and provided a valid satisfaction rating, n=328.

When asked about the frequency of communications from the CFIA, a majority felt it was about right (75%). Among remaining respondents, more than twice as many felt there was not enough communication (16%) as there were who felt there was too much (6%).

Figure 71. Frequency of communications from CFIA



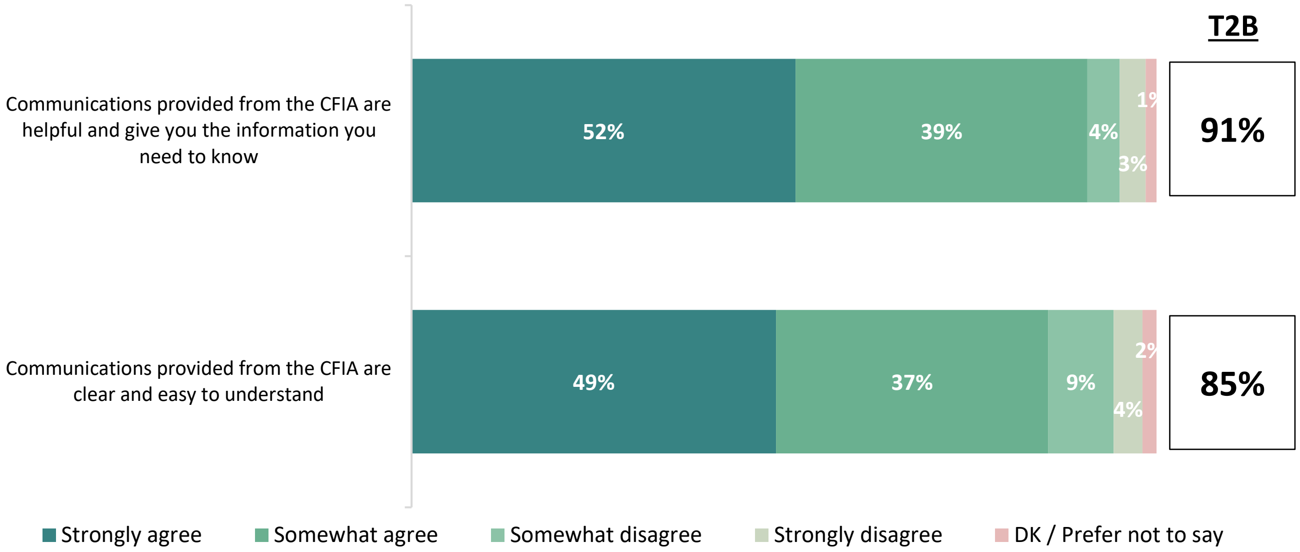
QI7. Would you say the frequency with which you get communications from the CFIA is…? Base: Businesses that received information from the CFIA in the past year, n=333.

Most business representatives who had received information from the CFIA in the past year (91%) agreed that these communications are helpful and provide the information they need to know (specifically, 52% strongly agreed while 39% somewhat agreed).

Similarly, 85% agreed that communications from the CFIA are clear and easy to understand (specifically, 49% strongly agreed while 37% somewhat agreed).

Agreement scores were consistent across sub-segments.

Figure 72. Impressions of CFIA communications

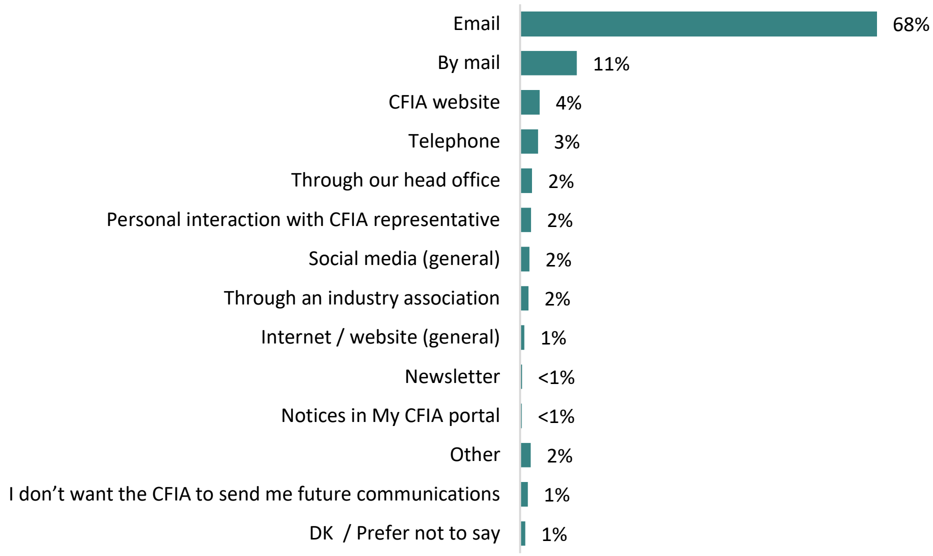


QI8. To what extent do you agree or disagree with the following statements about communications from CFIA? Do you strongly disagree, somewhat disagree, somewhat agree, or strongly agree that… Base: Businesses that received information from the CFIA in the past year, n=333.

Business representatives were asked about preferred channels of communication moving forward.

Email was the most preferred channel for communication from the CFIA (68%) followed at a distance by mail (11%). All other options were selected by no more than 4% of respondents.

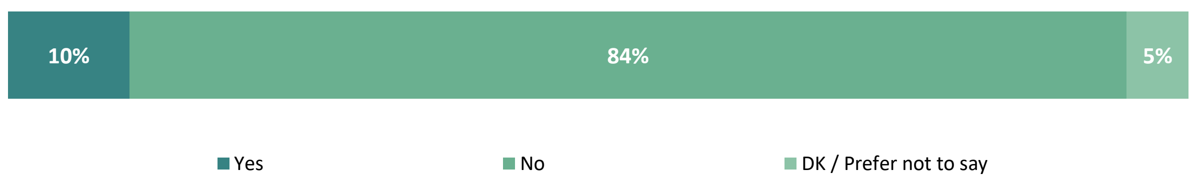
Figure 73. Preferred CFIA information channels



QI9. In the future, how would you most prefer that CFIA get you the information you need to know? Base: All respondents, n=850.

When business representatives were asked whether they have had difficulty getting the information they needed from the CFIA over the past few years, 10% reported difficulties while 84% did not have any difficulties.

Figure 74. Difficulty accessing information from CFIA



QI12. Over the past few years, have you had difficulty getting information you needed from CFIA? Base: All respondents, n=850.

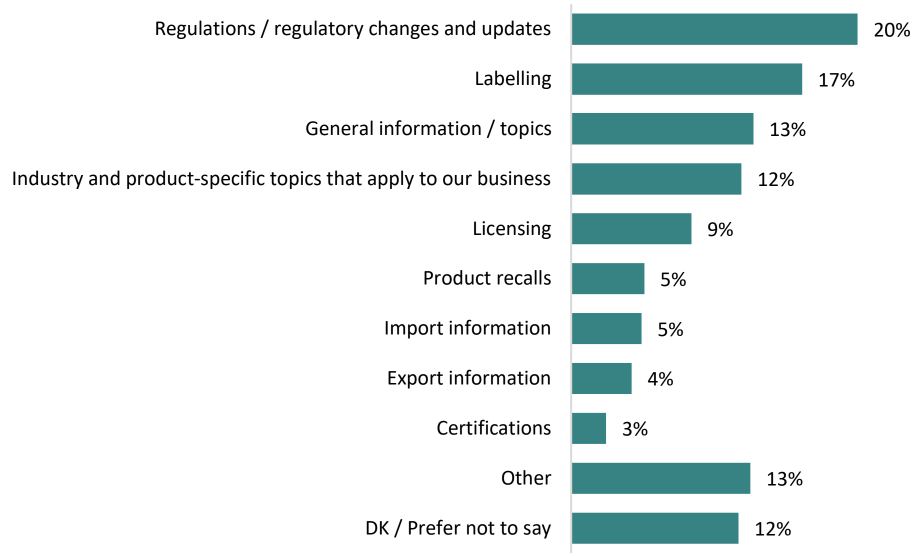
Key findings

- Processors/manufacturers (23%), wholesalers/distributors (18%) and businesses in agriculture (11%) were more likely than retailers (5%) to report having had difficulty accessing information from the CFIA

Those who reported experiencing difficulties getting information from the CFIA (n=99) were asked to list which topics they had difficulty getting information on.

The most cited topics included regulations or regulatory changes (20%), labelling (17%), general information (13%), and industry and product specific topics (12%).

Figure 75. Specific topics on which businesses had difficulty getting information from the CFIA



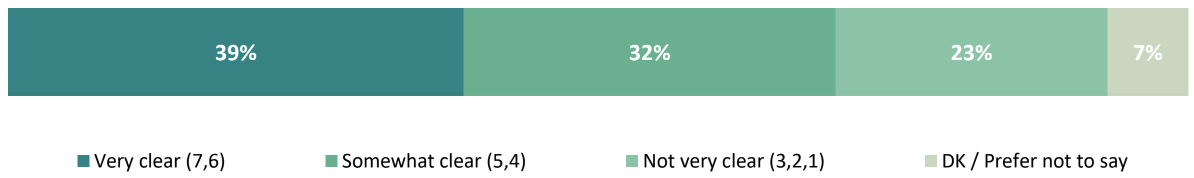
QI13. What specific topics did you have difficulty getting information on? Businesses that reported difficulty getting information from the CFIA, n=99.

Business representatives were asked about their knowledge and perceptions of "outcome-based" regulations.

A 7-point scale was used to measure how clear the concept of "outcome-based" regulations is, with 7 representing "very clear" and 1 representing "not at all clear".

Nearly two fifths of respondents (39%) believed that the concept of "outcome-based" regulations was clear to them (scores of 6 or 7) while it was somewhat clear (scores of 4 or 5) for 32% of businesses. Conversely, 23% felt the concept was not very clear (scores of 1, 2 or 3) and another 7% were unsure.

Figure 76. Knowledge of "outcome-based" regulations



QI14. Some food safety regulations are "outcome-based". How clear is the concept of "outcome-based" regulations to you personally? Please answer on a scale of 1 to 7, with 1 being not at all clear and 7 being very clear. Base: All respondents, n=850.

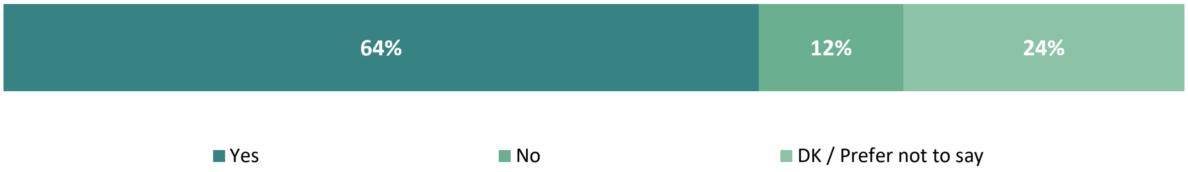
Key findings

Across sub-segments, businesses more likely to view the concept of "outcome-based" regulations as very clear included:

- Processors/manufacturers (45%), retailers (42%) and wholesalers/distributors (37%) compared to businesses in agriculture (25%)
- Large (46%), medium (41%) and small businesses (42%) compared to micro businesses (29%)

When asked to consider whether the SFCR are "outcome-based" regulations, nearly two thirds (64%) believed so while 12% did not. Nearly a quarter (24%) were unsure.

Figure 77. Perceptions of SFCR as an "outcomes-based" regulation

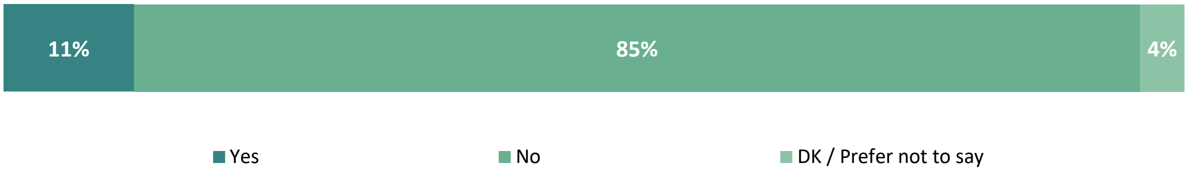


QI16. To the best of your knowledge, would you say the SFCR are an outcomes-based regulation? Base: All respondents, n=850.

Ask CFIA

More than 1 in 10 (11%) business representatives reported having used the Ask CFIA service.

Figure 78. Usage of "Ask CFIA"



QC4. Have you used the Ask CFIA service? Base: All respondents, n=850.

Key findings

Across sub-segments, businesses more likely to have used the Ask CFIA service included:

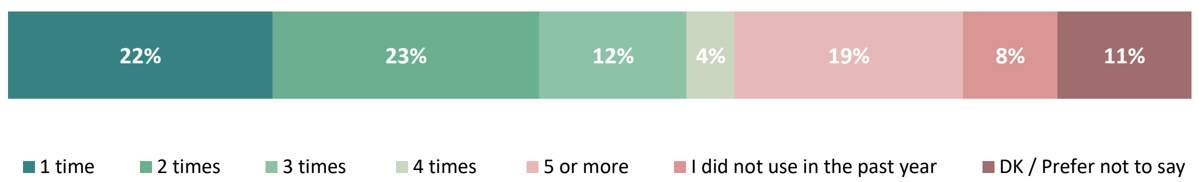
- Those in Ontario (12%) compared to those in Quebec (7%)
- Wholesalers/distributors (27%) and processors/manufacturers (26%) compared to businesses in agriculture (7%) and retailers (4%)

Those who had used the Ask CFIA service in the past (n=113) were asked how many times they had used the service in the past year.

More than a fifth (22%) had used the service just once, while a similar proportion (23%) had used the service twice in the past year. Another 12% had used the service three times, 4% had used it four times and 19% had used the service 5 or more times within the past year.

Less than 1 in 10 (8%) had not used the service within the past year while a slightly larger proportion (11%) were unsure.

Figure 79. Number of times “Ask CFIA” service was used in the past year

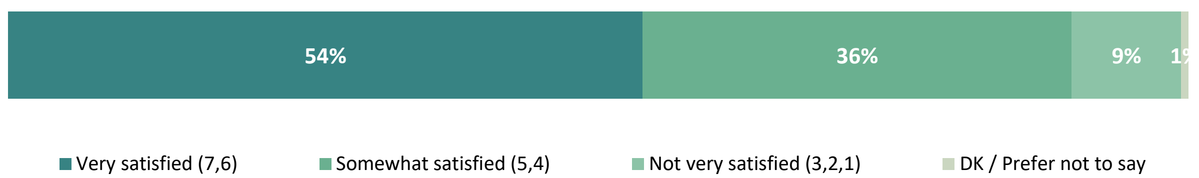


QC5. In the past year, how many times have you used the Ask CFIA service? Base: Businesses that have used the Ask CFIA service, n=113.

Those who had used the Ask CFIA service in the past were asked to rate their overall satisfaction with the service. A 7-point scale was used with 7 representing “very satisfied” and 1 representing “not at all satisfied”.

More than half of respondents (54%) reported high satisfaction (scores of 6 or 7) and more than a third (36%) reported moderate satisfaction (scores of 4 or 5). On the other hand, 9% reported low satisfaction (scores of 1, 2 or 3) and another 1% were unsure.

Figure 80. Overall satisfaction with “Ask CFIA” service



QC7. Rate your overall level of satisfaction with the Ask CFIA service. Please use a scale of 1 to 7, where 1 means “not at all satisfied” and 7 means “very satisfied”. Base: Businesses that have used the Ask CFIA service, n=113.

Those who provided a satisfaction rating for the Ask CFIA service were asked to provide the reason behind their rating.

Responses that were more positive included clear responses/helpful information (25%), satisfied with the service (17%), fast responses (17%) and easy to access/user-friendly (5%).

On the other hand, responses that were more constructive included delayed service/slow responses (16%), unclear/unhelpful responses (15%), dissatisfied with the service (8%), and difficulty to use/navigate the service (6%).

Additionally, 17% of those who rated Ask CFIA did not provide a reason for their rating.

Figure 81. Reasons for "Ask CFIA" ratings

Reasons provided	Total (n=112)	Among dissatisfied users (n=55) (satisfaction of rating of 5,4,3,2,1)	Among very satisfied users (n=57) (satisfaction rating of 7,6)
Clear response / provided helpful information	25%	9%	38%
Satisfied with service / good service (general)	17%	6%	27%
Fast response / responsive service	17%	6%	26%
Delayed service / slow response	16%	25%	9%
Unclear response / unhelpful information	15%	32%	1%
Dissatisfied with service / poor service (general)	8%	18%	-
Difficult to use / navigate service	6%	8%	4%
Easy to access / user-friendly service	5%	1%	9%
Other	7%	11%	4%
Don't know / Prefer not to say	17%	17%	17%

QC8. Why did you give the Ask CFIA service a rating of [PIPE RESPONSE FROM C7] for overall satisfaction? Base: Businesses that have used the Ask CFIA service and provided a valid satisfaction rating, n=112.

Methodology

All research work was conducted in accordance with the professional standards established by the Government of Canada Public Opinion Research Standards, as follows:

Qualitative research

The research methodology involved two phases of qualitative research:

- Phase 1: Online focus groups with Canadian adults (aged 18+)
- Phase 2: Online focus groups with representatives of Canadian food businesses

Phase 1 consisted of ten online focus groups with Canadians aged 18 and older across the country. The consumer focus groups were conducted online from February 1 to February 10, 2024.

Phase 2 consisted of eight online focus groups with representatives of food businesses in Canada across the country. The business focus groups were conducted between February 14 and February 21, 2024.

Quorus was responsible for coordinating all aspects of the research project including designing and translating the recruitment screener and the moderation guide, coordinating all aspects of participant recruitment, coordinating the online focus group platform and related logistics, moderating all sessions, and delivering required reports at the end of data collection.

In the focus groups with consumers, recruitment efforts aimed for a mix across age, gender, urban and rural populations, with some representation of visible minorities. In focus groups with representatives of food businesses, recruitment efforts aimed for a mix across business type and size and aimed for representation from small and medium sized businesses with female management/ownership and companies started by newcomers or recently immigrated individuals. For sessions that covered more than one province or territory, efforts aimed for representation from each individual province and territory within the given region.

Participants invited to participate in the focus groups were recruited by telephone from the general public, social media advertisements, as well as from an opt-in database. Commercially available business lists were also used to recruit for the industry focus groups.

In the design of the recruitment screener, specific questions were inserted to clearly identify whether participants qualify for the research program and to ensure a good representation across key profile dimensions.

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

- No participant (nor anyone in their immediate family or household) may work in an occupation that has anything to do with the research topic area, in related government departments/agencies, nor in advertising, marketing research, public relations or the media (radio, television, newspaper, film/video production, etc.).
- No participants acquainted with each other may be knowingly recruited for the same study, unless they are in different sessions that are scheduled separately.
- No participants may be recruited who have attended a qualitative research session within the past 6 months.
- No participant may be recruited who has attended 5 or more qualitative research sessions in the past 5 years.
- No participant should be recruited who has attended, in the past 2 years, a qualitative research session on the same general topic as defined by the researcher/moderator.

Data collection consisted of online focus groups, each lasting 1.5 hours. For focus groups with consumers, Quorus recruited 8 participants to achieve 6 to 8 participants per focus group. For focus groups with businesses, Quorus recruited 6 participants to achieve 5 to 6 participants per focus group.

All focus groups were held in the evenings on weekdays and during weekends using the Zoom web conferencing platform, allowing the client team to observe the sessions in real-time. The research team used the Zoom platform to host and record sessions (through microphones and webcams connected to the moderator and participants electronic devices, for example laptops and tablets) enabling client remote viewing. Recruited participants in the consumer groups were offered an honorarium of $125 for their participation while those in the business groups were offered $200.

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

- All recruitment was conducted in the participant's official language of choice, English and French, as appropriate.
- Upon request, participants were informed on how they can access the research findings.
- Upon request, participants were provided with Quorus' privacy policy.
- Recruitment confirmed each participant had the ability to speak, understand, read and write in the language in which the session was to be conducted.

- Participants were informed of their rights under the *Privacy* and *Access to Information Acts* and ensured those rights were protected throughout the research process. This included: informing participants of the purpose of the research, identifying both the sponsoring department or agency and research supplier, informing participants the study will be made available to the public 6 months after field completion through Library and Archives Canada, and informing participants that their participation in the study is voluntary and the information provided will be administered according to the requirements of the *Privacy Act*.

At the recruitment stage and at the beginning of each focus group, participants were informed that the research was for the Government of Canada. Participants were informed of the recording of their session in addition to the presence of Government of Canada observers. Quorus ensured that prior consent was obtained at the recruitment stage.

A total of ten online focus groups were conducted with Canadian consumers and eight online focus groups were conducted with representatives from food businesses. A total of 72 individuals participated in the consumer groups while 36 participated in the business groups. The schedule of the focus groups is as follows:

Figure 82 – Focus group schedule

Location	Language	Segment	Date (2024)	Participants
Consumer focus groups				
Atlantic Canada	English	Young adults (18-34)	February 1	7
Prairies (MB/SK/AB/NWT)	English	Young adults (18-34)	February 1	8
Atlantic Canada	English	Adults (35+)	February 5	6
Prairies (MB/SK/AB/NWT)	English	Adults (35+)	February 5	6
Quebec	French	Young adults (18-34)	February 6	8
Quebec	French	Adults (35+)	February 6	8
Ontario/Nunavut	English	Young adults (18-34)	February 8	8
Western Canada (BC/YK)	English	Young adults (18-34)	February 8	7
Ontario/Nunavut	English	Adults (35+)	February 10	8
Western Canada (BC/YK)	English	Adults (35+)	February 10	6
Total (consumer)	-	-		72
Food business focus groups				
Atlantic Canada	English	Food business	February 14	4
Prairies (MB/SK/AB/NWT)	English	Food business	February 14	5
Ontario/Nunavut	English	Food business	February 15	6

Location	Language	Segment	Date (2024)	Participants
Prairies (MB/SK/AB/NWT)	English	Food business	February 15	4
Ontario/Nunavut	English	Food business	February 20	5
British Columbia/Yukon	English	Food business	February 20	5
Quebec	French	Food business	February 21	3
Quebec	French	Food business	February 21	4
Total (business)	**-**	**-**		**36**

Quantitative research

Overview

The research consisted of two surveys: a national online consumer survey and a national telephone food business survey. The consumer survey consisted of 1,503 completions with Canadians 18 years or older conducted between March 13 and March 22, 2024. The food business survey consisted of 850 completions with businesses in the food industry in Canada from February 26 to March 27, 2024.

Questionnaire Design

The questions utilized in this study were provided by CFIA. Quorus reviewed the questions, providing suggestions and preparing them in a format suitable for each data collection mode. As required by Government of Canada standards, English and French pre-test surveys were conducted (more details related to the pre-tests are provided further in this methodology section).

Food safety consumer survey

Sampling

The research consisted of an online survey with Canadians at least 18 years of age, reflective of the distribution of the Canadian population. Respondents were also required to at least share in the responsibility of purchasing groceries for their respective household.

The sampling was designed to achieve 1,500 surveys, using non-probability sampling. Quorus utilized the services of an online panel records provider for this research. Panelists are recruited from a large number of sources to increase diversity and representation. This includes loyalty panels, organic, open enrollment and partnerships, and an affiliate network.

Administration

The online surveys utilized were programmed by Quorus in both English and French. Respondents were formally invited to the survey in the official language of their choice. As well, at any point when completing the questionnaire, respondents had the option to change the questionnaire language to the other official language.

Respondents were able to verify the legitimacy of the survey via contacting representatives of Quorus or via the Canadian Research Insights Council’s Research Verification Service. Each programmed survey was tested to ensure question order and skip patterns were properly implemented. Testing included Quorus researchers receiving the invitation via email just as a respondent would, to ensure accuracy of delivery, text, links, and so on. CFIA staff were also provided with the pre-test link and thus client feedback also was incorporated prior to the launch of the survey.

A total of 16 English and 9 French pre-tests were completed via a survey “soft launch” whereby a small number of panel respondents were invited to participate in the survey. The pre-testing of the survey allowed the collected data to be reviewed to ensure accuracy and to identify any programming aspects that should be modified. In addition to the actual survey queries, a section was included at the end of the questionnaire to ascertain respondent comprehension and experience with the survey. No changes in the survey instrument were made as a result of this endeavour. As such, all surveys completed via the pre-test were kept in the final sample.

The study was administered from March 13 to March 22, 2024. Fieldwork was monitored on an ongoing basis to ensure quotas were being met. Given that single use unique survey links were made available to panelists, no respondent was able to complete the survey questionnaire more than once.

A total of 1,503 surveys were submitted by respondents, requiring a mean average of approximately 9 minutes for respondents to complete. A non-probability sample approach was implemented given that the study was designed to be conducted among respondents drawn from an online panel. All such panels are inherently non-probability in nature, given that panelists self-select to become members of such panels, and not everyone in the target audience who is eligible to participate in the panel, indeed belongs to the panel.

Given that this online survey methodology used a non-probability sample, the data collected cannot be extrapolated to the overall population of Canadians. Further description of the non-probability sampling approach, including quotas and web panels, can be found here: https://www150.statcan.gc.ca/n1/edu/power-pouvoir/ch13/nonprob/5214898-eng.htm

A margin of error could not be calculated for the online results due to the use of a non-probability sample. The equivalent margin of error for a probability study of 1,500 cases would be +/- 2.5%.

Figure 83. Participation rate

Total click throughs (C)	2435
Invalid cases (T)	149
Terminations	149
Responding units (R)	2175
Completed surveys disqualified after the quota was filled	672
Completed surveys	1503
Participation rate = T + R / C (149 + 2175 / 2435)	95%

The online survey participation rate was approximately 95%.

Minimum quotas were established for region, age, and gender to ensure a robust representation of completed surveys from across the country. The data was weighted by age, gender, and region to ensure that the final distributions within the final sample mirror those of the Canadian population aged 18 years or older according to the latest census data.

Figure 84. Weighting by age

Age	Unweighted	Weighted	2021 Canada population estimates
18-34	26.9%	26.7%	26.7%
35-44	17.1%	16.5%	16.5%
45-54	19.9%	15.7%	15.7%
55-64	17.1%	17.5%	17.5%
65+	19.0%	23.6%	23.6%

Figure 85. Weighting by gender

Age	Unweighted	Weighted	2021 Canada population estimates
Men	49.4%	48.4%	48.8%
Women	50.2%	51.2%	51.2%

Figure 86. Weighting by region

Age	Unweighted	Weighted	2021 Canada population estimates
British Columbia	13.8%	13.8%	13.9%
Alberta	11.0%	11.0%	11.1%
Manitoba / Saskatchewan	6.3%	6.4%	6.4%
Ontario	38.5%	38.7%	38.7%
Quebec	23.0%	23.1%	23.1%
Atlantic Canada	7.1%	6.7%	6.7%

Food business survey

Sampling

The survey consisted of a national telephone survey with businesses in the food industry in Canada based on a selected list of North American Industry Classification System (NAICS) codes approved by CFIA.

The sampling was designed to be administered to a random sample of 850 industry representatives. Specifically:

- Employees responsible for regulatory compliance from small, medium, and large-sized food businesses
- Food importers
- Food import brokers
- Food exporters
- Employees responsible for regulatory compliance from businesses in the manufactured food sector
- Representation from all provinces and territories in Canada.

The sample frames were selected from a list of businesses from InfoCanada, a common and reputable list provider in the industry. The list of NAICS codes used are listed below.

Figure 87. NAICS codes

TARGETED INDUSTRIES WITH NAICS CODES			
AGRICULTURE, FORESTRY, FISHING AND HUNTING (11)			
11121101	Potato Farming	11231001	Chicken Egg Production
11121901	Other Vegetable (Except Potato) & Melon Farming	11233001	Turkey Production
11133101	Apple Orchards	11251901	Other Aquaculture
11133103	Apple Orchards	11251903	Other Aquaculture
11133104	Apple Orchards	11251904	Other Aquaculture
11133402	Berry (Except Strawberry) Farming	11292001	Horse & Other Equine Production
11133902	Other Noncitrus Fruit Farming	11293002	Fur-Bearing Animal & Rabbit Production
11141101	Mushroom Production	11293004	Fur-Bearing Animal & Rabbit Production
11141902	Other Food Crops Grown Under Cover	11299001	All Other Animal Production
11199801	All Other Miscellaneous Crop Farming	11299002	All Other Animal Production
11199803	All Other Miscellaneous Crop Farming	11299003	All Other Animal Production
11199804	All Other Miscellaneous Crop Farming	11299007	All Other Animal Production
11199806	All Other Miscellaneous Crop Farming	11299013	All Other Animal Production
11199807	All Other Miscellaneous Crop Farming	11299017	All Other Animal Production
11199808	All Other Miscellaneous Crop Farming	11421001	Hunting & Trapping
11199809	All Other Miscellaneous Crop Farming	11421004	Hunting & Trapping
11199810	All Other Miscellaneous Crop Farming	11421005	Hunting & Trapping
11199811	All Other Miscellaneous Crop Farming	11421006	Hunting & Trapping
11212001	Dairy Cattle & Milk Production	11421009	Hunting & Trapping
11212002	Dairy Cattle & Milk Production		
MANUFACTURING (31)			
31121102	Flour Milling	31161501	Poultry Processing
31121106	Flour Milling	31171001	Seafood Product Preparation & Packaging
31121107	Flour Milling	31171003	Seafood Product Preparation & Packaging
31121301	Malt Manufacturing	31171004	Seafood Product Preparation & Packaging
31122402	Soybean & Other Oilseed Processing	31171007	Seafood Product Preparation & Packaging
31122501	Fats & Oils Refining & Blending	31171008	Seafood Product Preparation & Packaging
31122505	Fats & Oils Refining & Blending	31181101	Retail Bakeries
31122508	Fats & Oils Refining & Blending	31181102	Retail Bakeries
31122511	Fats & Oils Refining & Blending	31181103	Retail Bakeries
31122512	Fats & Oils Refining & Blending	31181104	Retail Bakeries
31122516	Fats & Oils Refining & Blending	31181105	Retail Bakeries
31123001	Breakfast Cereal Manufacturing	31181202	Commercial Bakeries
31131401	Cane Sugar Manufacturing	31182101	Cookie & Cracker Manufacturing
31131403	Cane Sugar Manufacturing	31182403	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour
31135101	Chocolate/Confectionery Mfg From Cacao Beans	31182404	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour
31135201	Confectionery Mfg From Purchased Chocolate	31191102	Roasted Nuts & Peanut Butter Manufacturing
31141102	Frozen Fruit Juice & Vegetable Manufacturing	31191901	Other Snack Food Manufacturing
31141202	Frozen Specialty Food Manufacturing	31191905	Other Snack Food Manufacturing
31141203	Frozen Specialty Food Manufacturing	31191906	Other Snack Food Manufacturing
31141204	Frozen Specialty Food Manufacturing	31192001	Coffee & Tea Manufacturing
31142101	Fruit & Vegetable Canning	31192002	Coffee & Tea Manufacturing
31142103	Fruit & Vegetable Canning	31194101	Mayonnaise Dressing & Other Prepared Sauce Mfg
31142104	Fruit & Vegetable Canning	31194103	Mayonnaise Dressing & Other Prepared Sauce Mfg
31142106	Fruit & Vegetable Canning	31194202	Spice & Extract Manufacturing
31142107	Fruit & Vegetable Canning	31194203	Spice & Extract Manufacturing
31142303	Dried & Dehydrated Food Manufacturing	31199901	All Other Miscellaneous Food Manufacturing
31151201	Creamery Butter Manufacturing	31199902	All Other Miscellaneous Food Manufacturing
31151301	Cheese Manufacturing	31199905	All Other Miscellaneous Food Manufacturing
31151402	Dry Condensed & Evaporated Dairy Products Mfg	31199906	All Other Miscellaneous Food Manufacturing
31152001	Ice Cream & Frozen Dessert Manufacturing	31199908	All Other Miscellaneous Food Manufacturing
31161101	Animal (Except Poultry) Slaughtering	31199910	All Other Miscellaneous Food Manufacturing
31161102	Animal (Except Poultry) Slaughtering	31199913	All Other Miscellaneous Food Manufacturing
31161103	Animal (Except Poultry) Slaughtering	31199917	All Other Miscellaneous Food Manufacturing
31161104	Animal (Except Poultry) Slaughtering	31199919	All Other Miscellaneous Food Manufacturing
31161202	Meat Processed From Carcasses	31199920	All Other Miscellaneous Food Manufacturing
31161205	Meat Processed From Carcasses	31211101	Soft Drink Manufacturing
31161207	Meat Processed From Carcasses	31211102	Soft Drink Manufacturing
31161301	Rendering & Meat Byproduct Processing	31211103	Soft Drink Manufacturing
31161302	Rendering & Meat Byproduct Processing		

WHOLESALE TRADE (42)			
42441003	General Line Grocery Merchant Wholesalers	42449010	Other Grocery & Related Products Merchant Whlsrs
42441004	General Line Grocery Merchant Wholesalers	42449011	Other Grocery & Related Products Merchant Whlsrs
42441005	General Line Grocery Merchant Wholesalers	42449013	Other Grocery & Related Products Merchant Whlsrs
42442001	Packaged Frozen Food Merchant Wholesalers	42449015	Other Grocery & Related Products Merchant Whlsrs
42442002	Packaged Frozen Food Merchant Wholesalers	42449017	Other Grocery & Related Products Merchant Whlsrs
42442003	Packaged Frozen Food Merchant Wholesalers	42449018	Other Grocery & Related Products Merchant Whlsrs
42442004	Packaged Frozen Food Merchant Wholesalers	42449019	Other Grocery & Related Products Merchant Whlsrs
42442005	Packaged Frozen Food Merchant Wholesalers	42449022	Other Grocery & Related Products Merchant Whlsrs
42442006	Packaged Frozen Food Merchant Wholesalers	42449024	Other Grocery & Related Products Merchant Whlsrs
42442007	Packaged Frozen Food Merchant Wholesalers	42449026	Other Grocery & Related Products Merchant Whlsrs
42443009	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449027	Other Grocery & Related Products Merchant Whlsrs
42443010	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449030	Other Grocery & Related Products Merchant Whlsrs
42443012	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449032	Other Grocery & Related Products Merchant Whlsrs
42443013	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449033	Other Grocery & Related Products Merchant Whlsrs
42444001	Poultry & Poultry Product Merchant Wholesalers	42449034	Other Grocery & Related Products Merchant Whlsrs
42444002	Poultry & Poultry Product Merchant Wholesalers	42449035	Other Grocery & Related Products Merchant Whlsrs
42444003	Poultry & Poultry Product Merchant Wholesalers	42449037	Other Grocery & Related Products Merchant Whlsrs
42445002	Confectionery Merchant Wholesalers	42449042	Other Grocery & Related Products Merchant Whlsrs
42445004	Confectionery Merchant Wholesalers	42449044	Other Grocery & Related Products Merchant Whlsrs
42445008	Confectionery Merchant Wholesalers	42449046	Other Grocery & Related Products Merchant Whlsrs
42445010	Confectionery Merchant Wholesalers	42449047	Other Grocery & Related Products Merchant Whlsrs
42446001	Fish & Seafood Merchant Wholesalers	42449050	Other Grocery & Related Products Merchant Whlsrs
42446002	Fish & Seafood Merchant Wholesalers	42449055	Other Grocery & Related Products Merchant Whlsrs
42447002	Meat & Meat Product Merchant Wholesalers	42449056	Other Grocery & Related Products Merchant Whlsrs
42447005	Meat & Meat Product Merchant Wholesalers	42449057	Other Grocery & Related Products Merchant Whlsrs
42447006	Meat & Meat Product Merchant Wholesalers	42449061	Other Grocery & Related Products Merchant Whlsrs
42448007	Fresh Fruit & Vegetable Merchant Wholesalers	42449064	Other Grocery & Related Products Merchant Whlsrs
42448008	Fresh Fruit & Vegetable Merchant Wholesalers	42451002	Grain & Field Bean Merchant Wholesalers
42448009	Fresh Fruit & Vegetable Merchant Wholesalers	42451005	Grain & Field Bean Merchant Wholesalers
42448010	Fresh Fruit & Vegetable Merchant Wholesalers	42459003	Other Farm Product Raw Material Merchant Whlsrs
42448011	Fresh Fruit & Vegetable Merchant Wholesalers	42459005	Other Farm Product Raw Material Merchant Whlsrs
42449002	Other Grocery & Related Products Merchant Whlsrs	42459007	Other Farm Product Raw Material Merchant Whlsrs
42449003	Other Grocery & Related Products Merchant Whlsrs	42459008	Other Farm Product Raw Material Merchant Whlsrs
42449005	Other Grocery & Related Products Merchant Whlsrs	42459010	Other Farm Product Raw Material Merchant Whlsrs
42449006	Other Grocery & Related Products Merchant Whlsrs	42459017	Other Farm Product Raw Material Merchant Whlsrs
RETAIL TRADE (44)			
44511001	Supermarkets/Other Grocery (Exc Convenience) Strs	44529902	All Other Specialty Food Stores
44511002	Supermarkets/Other Grocery (Exc Convenience) Strs	44529903	All Other Specialty Food Stores
44511003	Supermarkets/Other Grocery (Exc Convenience) Strs	44529905	All Other Specialty Food Stores
44511005	Supermarkets/Other Grocery (Exc Convenience) Strs	44529906	All Other Specialty Food Stores
44511006	Supermarkets/Other Grocery (Exc Convenience) Strs	44529907	All Other Specialty Food Stores
44511007	Supermarkets/Other Grocery (Exc Convenience) Strs	44529909	All Other Specialty Food Stores
44511008	Supermarkets/Other Grocery (Exc Convenience) Strs	44529910	All Other Specialty Food Stores
44512001	Convenience Stores	44529911	All Other Specialty Food Stores
44521001	Meat Markets	44529912	All Other Specialty Food Stores
44521003	Meat Markets	44529914	All Other Specialty Food Stores
44521004	Meat Markets	44529915	All Other Specialty Food Stores
44521006	Meat Markets	44529917	All Other Specialty Food Stores
44521009	Meat Markets	44529918	All Other Specialty Food Stores
44521010	Meat Markets	44529920	All Other Specialty Food Stores
44521012	Meat Markets	44529921	All Other Specialty Food Stores
44522003	Fish & Seafood Markets	44529923	All Other Specialty Food Stores
44522004	Fish & Seafood Markets	44529924	All Other Specialty Food Stores
44523001	Fruit & Vegetable Markets	44529927	All Other Specialty Food Stores
44523003	Fruit & Vegetable Markets	44529929	All Other Specialty Food Stores
44523005	Fruit & Vegetable Markets	44529930	All Other Specialty Food Stores
44523006	Fruit & Vegetable Markets	44529932	All Other Specialty Food Stores
44529202	Confectionery & Nut Stores	44529934	All Other Specialty Food Stores
44529204	Confectionery & Nut Stores	44529936	All Other Specialty Food Stores
44529205	Confectionery & Nut Stores	44529938	All Other Specialty Food Stores
44529206	Confectionery & Nut Stores		

Administration

As noted, the survey was conducted via telephone. The survey was programmed by Quorus and its data collection partner in both English and French via Computer-Assisted Telephone Interviewing software (CATI). Respondents had the option to complete the survey questionnaire in the official language of their choice. Assistance was available from bilingual staff members as required, with ongoing bilingual supervision.

If an interviewer did not speak the official language requested by the respondent, the interview transferred to another interviewer or a call-back was arranged within 20 minutes (or at another time if requested by the respondent). When calling to a particular location with a predominant language (e.g., French in Quebec), initial calling was conducted by interviewers who spoke the predominant language, to minimize the number of transfers required.

In terms of training, in addition to a thorough general screening and training process, supervisors and interviewers were provided with customized project-specific training, a review of the questionnaire including specific terminology, acronyms and pronunciations, and background information on the project goals and objectives.

In terms of supervision, as with all projects there was a ratio of one supervisor for every 10 interviewers working. This "floor supervisor" answers questions, handles escalations, ensures that technology is functioning properly, and blind monitors interviewers.

Respondents were able to verify the legitimacy of the survey via contacting representatives of Quorus and/or CFIA, or via the Canadian Research Insights Council's Research Verification Service.

The programmed survey was thoroughly tested to ensure question order and skip patterns were properly represented. In addition to this testing, a pre-test was conducted resulting in 10 English and 10 French surveys. The overall purpose of the pre-test was to ensure that:

- The wording of the questions was clearly understood and unambiguous;
- The sequence of the questions was appropriate;
- The necessary response categories had been included for each question; and
- Neither specific questions nor the survey overall evoked a negative reaction or discomfort among respondents.

After the pre-test, the data was carefully reviewed to ensure accuracy and identify any aspects that needed to be modified. In addition to the actual survey queries, a section was included at the end of the questionnaire to ascertain respondent comprehension and experience with the survey.

Given the average completion length of roughly 25 minutes, cuts to the survey were made prior to fully launching the survey, and the responses were ultimately included in the final sample.

Fieldwork was monitored on an ongoing basis, allowing supervisors to determine if there were any challenges via the call disposition/reasons for non-response information. The survey required a mean average of approximately 19 minutes for respondents to complete.

The tables below display industry and regional data in terms of the actual distribution of Canadian food businesses, as catalogued by our sample provider. As well, target quotas and completed surveys for each industry and region are detailed (both in terms of the actual *number* of surveys completed, and the *percentage* of all surveys completed). The tables on the pages below present data with the weighted and unweighted *number* as well as *percentage* of surveys collected.

Figure 88. Distribution of the target population and of the final sample

Subsegments	Sample universe (n=)	Sample universe (%)	Surveys completed (unweighted) (n=)	Surveys completed (unweighted) (%)	Surveys completed (weighted) (n=)	Surveys completed (weighted) (%)
Industry – Agriculture, forestry, fishing, and hunting	8,053	15.9%	131	15.4%	136	16.0%
Industry – Manufacturing	4,688	9.3%	137	16.1%	79	9.3%
Industry – Wholesale trade	10,274	20.3%	220	25.9%	172	20.2%
Industry – Retail trade	27,636	54.6%	362	42.6%	463	54.5%
Region – British Columbia	6,418	12.7%	111	13.1%	108	12.7%
Region – Alberta	5,066	10.0%	77	9.1%	85	10.0%
Region – Saskatchewan	2,801	5.5%	43	5.1%	47	5.5%
Region – Manitoba	1,783	3.5%	32	3.8%	30	3.5%
Region – Ontario	17,003	33.6%	296	34.8%	285	33.6%
Region – Quebec	14,107	27.9%	234	27.5%	237	27.9%
Region – New Brunswick	1,022	2.0%	18	2.1%	17	2.0%
Region – Nova Scotia	1,362	2.7%	18	2.1%	23	2.7%

Region – Prince Edward Island	294	0.6%	8	0.9%	5	0.6%
Region – Newfoundland and Labrador	673	1.3%	9	1.1%	11	1.3%
Region – Territories	122	0.2%	2	0.2%	1	0.1%

For this study, a quota for "Retail Only" businesses was established to minimize the dominance of this segment in the overall sample (n=300). Data was monitored to also ensure that multiple locations from the same franchises were not overrepresented in the sample.

Data tabulation: Results were weighted using industry totals from the sample universe provided by our sample provider and then by province.

Participation/Response rate: The rate below was derived using the principal elements of the formula recommended by the Public Opinion Research Directorate of the Government of Canada:

Figure 89. Completion results:

A. Total numbers attempted	**20,456**
Total invalid numbers	**4,068**
B. Total unresolved numbers (U)	**10,741**
No answer/answering machine	10,741
C. In-scope non-responding units (IS)	**4,511**
Language barrier	106
Incapable of completing (ill/deceased)	75
Callback (respondent not available)	1,055
Refusal	3,069
Termination	206
D. Responding units (R)	**1,136**
Quota full/not completed	75
Completed interviews	850
NQ - INTRAPROVINCIAL ONLY	29
NQ - None of the above at S5, S7 & S8	182
Rounded response rate: UR ÷ (NR + UNR + UR) = 1,136 ÷ (10,741 + 4,511 + 1,136)	**6.9**
Incidence	**74.8**

Given that this telephone survey methodology entailed a probability sampling approach, the data collected can be extrapolated to the Canadian population of food businesses, within the limitations of the attendant margins of error and the confidence interval.

The margin of error of this sample size is +/- 3.3%, 19 times out of 20. The research findings can be extrapolated to the broader audience considering the margin of error associated with this sample size. The margins of error for the results in this study will vary based on a variety of factors. For instance, results for sub-groups with smaller sample sizes will have a higher margin of error. As well, the margin of error is typically highest for questions where 50% of respondents answered one way and 50% answered another way. The margin of error typically decreases as the percent for a particular response approaches 0% or 100%.

Respondent profile – Consumer survey

General population

Figure 90. Age

Age	Unweighted total (n=1,503)	Weighted total (n=1,503)
18-24	11%	11%
25-34	16%	16%
35-44	17%	17%
45-54	20%	16%
55-64	17%	18%
65 or older	19%	24%

Figure 91. Gender

Gender	Unweighted total (n=1,503)	Weighted total (n=1,503)
Male	49%	48%
Female	50%	51%
Other gender identity	<1%	<1%
Prefer not to say	<1%	<1%

Figure 92. Region

Region	Unweighted total (n=1,503)	Weighted total (n=1,503)
British Columbia	14%	14%
Alberta	11%	11%
Saskatchewan	3%	3%
Manitoba	3%	4%
Ontario	38%	39%
Quebec	23%	23%
New Brunswick	3%	2%
Nova Scotia	3%	3%
Prince Edward Island	<1%	<1%
Newfoundland and Labrador	1%	1%
Yukon	<1%	<1%
Northwest Territories	<1%	<1%
Nunavut	-	-

Figure 93. Grocery shopping responsibility

Grocery responsibility	Unweighted total (n=1,503)	Weighted total (n=1,503)
I am solely responsible	52%	52%
I share in this responsibility	48%	48%
Prefer not to say	<1%	<1%

Figure 94. Respondent descriptions – unweighted (n=1,503)

Descriptions	Describes me completely	Describes me somewhat	Does not describe me at all	DK / Prefer not to say
Foodie	27%	45%	26%	2%
Camper	14%	30%	54%	2%
Cottager	12%	26%	57%	5%
Hobby farmer	5%	14%	77%	4%
Gardener	17%	40%	42%	2%
Nature enthusiast	25%	53%	20%	2%
Hiker	14%	44%	41%	2%
Outdoor enthusiast	22%	52%	24%	2%
Pet owner	44%	15%	39%	2%
Animal lover	43%	39%	16%	2%
Small bird flock owner	3%	5%	88%	4%
Pet pig owner	1%	2%	93%	4%
Travel enthusiast	31%	45%	22%	2%
Travel south for the winter “snowbird”	4%	17%	75%	3%
Biology or ecology hobbyists and enthusiasts	6%	23%	66%	4%

Figure 95. Respondent descriptions – weighted (n=1,503)

Descriptions	Describes me completely	Describes me somewhat	Does not describe me at all	DK / Prefer not to say
Foodie	27%	45%	26%	2%
Camper	13%	29%	55%	2%
Cottager	12%	25%	58%	5%
Hobby farmer	5%	15%	77%	4%
Gardener	17%	40%	41%	2%
Nature enthusiast	26%	52%	20%	2%
Hiker	13%	43%	41%	2%
Outdoor enthusiast	22%	52%	24%	2%
Pet owner	43%	15%	40%	2%
Animal lover	43%	39%	16%	2%
Small bird flock owner	3%	5%	88%	4%
Pet pig owner	1%	2%	93%	4%
Travel enthusiast	30%	45%	23%	2%
Travel south for the winter "snowbird"	4%	17%	75%	2%
Biology or ecology hobbyists and enthusiasts	6%	23%	66%	5%

Figure 96. Education

Education	Unweighted total (n=1,503)	Weighted total (n=1,503)
Some high school	3%	3%
High school diploma or equivalent	18%	19%
Registered apprenticeship or other trades certificate or diploma	6%	6%
College, CEGEP or other non-university certificate or diploma	26%	27%
University certificate or diploma below bachelor's level	5%	5%
Bachelor's degree	29%	28%
Graduate degree above bachelor's level	12%	12%
Prefer not to say	1%	1%

Figure 97. Language spoken most often at home

Language	Unweighted total (n=1,503)	Weighted total (n=1,503)
English	75%	75%
French	21%	21%
Other	3%	3%
Prefer not to say	1%	1%

Figure 98. Household income

Household income	Unweighted total (n=1,503)	Weighted total (n=1,503)
Under $20,000	6%	6%
$20,000 to just under $40,000	13%	14%
$40,000 to just under $60,000	14%	15%
$60,000 to just under $80,000	13%	13%
$80,000 to just under $100,000	15%	15%
$100,000 to just under $150,000	18%	17%
$150,000 and above	13%	12%
Prefer not to say	9%	9%

Figure 99. Indigenous status

Indigenous status	Unweighted total (n=1,503)	Weighted total (n=1,503)
Indigenous	4%	4%
First Nations (North American Indian)	2%	2%
Métis	1%	1%
Inuk (Inuit)	1%	<1%
Other	<1%	<1%
Prefer not to say	<1%	<1%
Non-Indigenous	95%	95%
Prefer not to say	1%	1%

Figure 100. Visible minority status

Visible Minority status	Unweighted total (n=1,444)	Weighted total (n=1,445)
Visible minority	15%	14%
Chinese	4%	4%
South Asian/East Indian	3%	3%
Black	2%	2%
Filipino	1%	1%
Non-White West Asian, North African, or Arab	1%	1%
Southeast Asian	1%	1%
Person of mixed origin	1%	1%
Non-White Latin American	1%	<1%
Japanese	<1%	<1%
Caucasian/White	<1%	<1%
Korean	<1%	<1%
Other	<1%	<1%
Prefer not to say	1%	1%
Non-minority	82%	83%
Prefer not to say	2%	2%

Figure 101. Area

Area	Unweighted total (n=1,435)	Weighted total (n=1,436)
Urban	87%	86%
Rural	13%	14%

Respondent profile – Business survey

Figure 102. Region by industry sector and company size

Region	Total (n=850)	Agriculture (n=164)	Processor / Manufacturer (n=148)	Wholesaler / Distributor (n=144)	Retailer (n=387)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
Atlantic (NET)	6%	5%	4%	1%	10%	4%	7%	8%	5%
Newfoundland & Labrador	1%	-	1%	-	2%	1%	1%	1%	-
Prince Edward Island	1%	1%	1%	1%	1%	-	1%	2%	-
Nova Scotia	2%	1%	1%	1%	3%	2%	2%	2%	3%
New Brunswick	2%	2%	-	-	4%	1%	3%	2%	3%
Quebec	28%	34%	28%	20%	28%	30%	28%	28%	20%
Ontario / Nunavut (NET)	35%	30%	36%	45%	33%	35%	31%	35%	47%
Ontario	35%	30%	36%	45%	32%	35%	31%	35%	46%
Nunavut	<1%	-	-	-	<1%	-	-	-	1%
West (NET)	31%	31%	32%	33%	30%	31%	34%	30%	28%
Manitoba	4%	3%	3%	3%	4%	3%	3%	4%	5%
Northwest Territories	<1%	-	-	1%	-	-	1%	-	-
Saskatchewan	5%	8%	6%	2%	5%	7%	4%	4%	8%
Alberta	9%	9%	6%	10%	9%	9%	9%	10%	6%
Yukon	<1%	-	1%	1%	-	<1%	1%	-	-
British Columbia	13%	11%	16%	17%	12%	11%	18%	12%	9%

QS1. Province/territory. Base: All respondents, n=850.

Figure 103. Company size by industry sector and region

Company size	Total (n=850)	Agriculture (n=164)	Processor/ Manufacturer (n=148)	Wholesaler/ Distributor (n=144)	Retailer (n=387)	Atlantic (n=53)	Quebec (n=234)	Ontario (n=297)	West (n=155)
1 (Self-employed)	6%	13%	1%	11%	2%	-	7%	6%	7%
2-4 employees	20%	31%	17%	19%	17%	17%	21%	20%	21%
5-10 employees	23%	18%	25%	25%	24%	25%	24%	21%	21%
11-99 employees	41%	33%	45%	38%	45%	51%	41%	41%	41%
100-499 employees	8%	3%	11%	5%	9%	6%	6%	10%	8%
500 employees or more	2%	1%	1%	1%	3%	2%	<1%	2%	2%
DK / Prefer not to say	1%	1%	-	1%	1%	-	-	<1%	1%

QS3. Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. Base: All respondents, n=850.

Figure 104. Industry sector by region and company size

Industry sector	Total (n=850)	Atlantic (n=53)	Quebec (n=234)	Ontario (n=297)	West (n=155)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
Retailer	46%	70%	46%	42%	45%	33%	46%	49%	58%
Processor or Manufacturer	17%	11%	18%	18%	15%	12%	19%	19%	22%
Wholesale or distributor	17%	4%	12%	22%	15%	20%	18%	16%	11%
Agriculture	19%	15%	24%	16%	21%	33%	15%	15%	9%
Other	1%	-	-	1%	3%	1%	2%	<1%	-

QS4. Which of the following categories best describes your business? Base: All respondents, n=850.

Figure 105. Business activities by region and company size

Business activities	Total (n=850)	Atlantic (n=53)	Quebec (n=234)	Ontario (n=297)	West (n=155)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
Import food products	26%	15%	19%	31%	23%	21%	23%	28%	39%
Export food products	18%	17%	13%	19%	23%	17%	14%	19%	30%
Send food products to another province or territory	27%	13%	21%	31%	25%	20%	26%	31%	28%
None of the above	53%	68%	62%	49%	49%	56%	58%	51%	41%

QS5. Does your business do any of the following? Base: All respondents, n=850.

Figure 106. Use of a broker by region and company size

Use of a broker	Total (n=222)	Atlantic (n=8)	Quebec (n=44)	Ontario (n=93)	West (n=35)	Micro (n=46)	Small (n=45)	Medium (n=99)	Large (n=31)
Import ourselves	31%	13%	23%	34%	29%	52%	29%	25%	23%
Import through a broker	38%	50%	50%	29%	54%	28%	49%	37%	35%
Both	20%	13%	20%	24%	11%	11%	18%	27%	16%
Other	6%	25%	5%	8%	3%	9%	4%	2%	16%
DK / Prefer not to say	5%	-	2%	5%	3%	-	-	8%	10%

QS6. Do you import food products yourself or through a broker? Base: Food importers, n=222.

Figure 107. Provincial or national distribution by region and company size

Provincial or national activities	Total (n=850)	Atlantic (n=53)	Quebec (n=234)	Ontario (n=297)	West (n=155)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
Prepare, package, or label food for sending to another province/territory or country	20%	17%	12%	23%	19%	11%	14%	26%	29%
Prepare, package, or label food for sale or trade within your province/territory	54%	51%	60%	54%	46%	41%	51%	61%	66%
None of the above	43%	43%	38%	43%	50%	58%	47%	34%	33%

QS7. And does your business do any of the following? [SELECT ALL THAT APPLY] Base: All respondents, n=850.

Figure 108. Direct or online sales by region and company size

Direct or online sales	Total (n=850)	Atlantic (n=53)	Quebec (n=234)	Ontario (n=297)	West (n=155)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
Sell food directly to consumers	77%	87%	82%	76%	72%	74%	82%	77%	76%
Sell food products online	21%	11%	17%	25%	19%	22%	19%	18%	32%
None of the above	20%	11%	16%	22%	25%	23%	15%	21%	23%

QS8. And does your business do any of the following? [SELECT ALL THAT APPLY] Base: All respondents, n=850.

Figure 109. Provincial or national online sales by region and company size

Provincial or national online sales	Total (n=177)	Atlantic (n=6)	Quebec (n=39)	Ontario (n=74)	West (n=30)	Micro (n=49)	Small (n=38)	Medium (n=64)	Large (n=25)
Sell food products online within your province/territory	94%	100%	95%	92%	97%	92%	92%	95%	100%
Sell food products online to other provinces or other countries	31%	17%	15%	34%	30%	35%	42%	30%	12%
None of the above	2%	-	-	3%	3%	2%	3%	3%	-

QS9. Do you...? [SELECT ALL THAT APPLY] Base: Online sellers, n=177.

Figure 110. Types of foods dealt with by region and company size

Types of foods dealt with	Total (n=850)	Agriculture (n=164)	Processor/ Manufacturer (n=148)	Wholesaler/ Distributor (n=144)	Retailer (n=387)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
Manufactured foods	52%	55%	53%	49%	53%	42%	51%	56%	65%
Meat products and food animals	49%	64%	47%	47%	57%	38%	47%	53%	67%
Fresh fruits or vegetables	46%	72%	44%	47%	39%	24%	34%	61%	70%
Dairy products	45%	60%	53%	40%	42%	27%	45%	53%	61%
Egg and processed egg products	40%	57%	41%	36%	40%	25%	35%	47%	59%
Processed fruit or vegetable products	39%	53%	38%	38%	37%	21%	32%	49%	63%
Honey	34%	51%	35%	35%	31%	21%	24%	43%	57%
Maple syrup or maple products	33%	45%	38%	33%	25%	21%	24%	39%	58%
Fish	32%	53%	28%	33%	30%	15%	22%	44%	57%
Flour or grain	4%	2%	<1%	2%	14%	8%	2%	2%	3%
Bakery products/bread	2%	2%	4%	2%	1%	2%	2%	3%	3%
Grocery items/everything	2%	6%	1%	3%	3%	2%	1%	3%	1%
Coffee/coffee beans	1%	-	<1%	2%	1%	3%	2%	-	-
Alcohol	1%	-	3%	<1%	-	1%	1%	1%	-
Chocolate	1%	-	1%	<1%	1%	1%	2%	1%	-
Other	6%	4%	6%	6%	6%	8%	8%	5%	3%
DK / Prefer not to say	<1%	-	-	<1%	1%	<1%	-	<1%	-

QS11. Which of the following foods does your company deal with? [SELECT ALL THAT APPLY] Base: All respondents, n=850.

Figure 111. Indigenous status by region and company size

Indigenous status	Total (n=850)	Atlantic (n=53)	Quebec (n=234)	Ontario (n=297)	West (n=155)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
Yes	7%	9%	3%	6%	11%	7%	11%	6%	4%
No	90%	89%	96%	91%	86%	92%	87%	91%	89%
DK / Prefer not to say	2%	2%	1%	3%	3%	1%	2%	3%	8%

QD3. Would you classify your company as Indigenous-owned or -operated? Base: All respondents, n=850.

Figure 112. Annual revenue by region and company size

Annual revenue	Total (n=850)	Agriculture (n=164)	Processor/ Manufacturer (n=148)	Wholesaler/ Distributor (n=144)	Retailer (n=387)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
$30,000 or less per year	3%	4%	4%	2%	2%	9%	2%	1%	-
Between $30,000 and less than $1000,000 per year	6%	8%	8%	6%	8%	19%	4%	1%	-
Between $100,000 and less than $500,000 per year	15%	17%	12%	15%	12%	31%	19%	5%	4%
Between $500,000 and less than $1 million per year	11%	13%	17%	8%	12%	15%	17%	8%	1%
Between $1 million and less than $5 million per year	22%	34%	21%	23%	21%	13%	30%	24%	11%
$5 million or more per year	21%	13%	17%	26%	23%	2%	5%	35%	57%
DK / Prefer not to say	21%	11%	22%	21%	21%	11%	22%	25%	27%

QD4. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All respondents, n=850.

Figure 113. Women in senior management by region and company size

% of females in senior management	Total (n=850)	Agriculture (n=164)	Processor/ Manufacturer (n=148)	Wholesaler/ Distributor (n=144)	Retailer (n=387)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
0%	12%	6%	17%	13%	9%	24%	8%	8%	4%
1% to 24%	20%	32%	9%	23%	22%	9%	28%	22%	19%
25% to 49%	16%	17%	15%	18%	16%	14%	15%	18%	16%
50% to 74%	27%	19%	32%	23%	28%	28%	26%	25%	32%
75% to 99%	8%	6%	14%	5%	7%	6%	8%	11%	4%
100%	8%	11%	10%	7%	5%	12%	9%	5%	1%
DK / Prefer not to say	10%	9%	3%	12%	13%	6%	7%	10%	24%

QD5. Can you provide an approximate percentage of individuals in your company with a senior management role that identify as women? Base: All respondents, n=850.

Figure 114. Visible minorities in senior management by region and company size

% of visible minorities in senior management	Total (n=850)	Agriculture (n=164)	Processor/ Manufacturer (n=148)	Wholesaler/ Distributor (n=144)	Retailer (n=387)	Micro (n=218)	Small (n=197)	Medium (n=350)	Large (n=79)
0%	48%	49%	64%	44%	41%	66%	50%	41%	22%
1% to 24%	17%	25%	14%	15%	21%	4%	17%	23%	23%
25% to 49%	4%	4%	3%	5%	4%	2%	4%	5%	6%
50% to 74%	7%	4%	6%	8%	5%	5%	7%	8%	6%
75% to 99%	3%	2%	2%	3%	5%	<1%	5%	3%	3%
100%	5%	2%	3%	5%	6%	10%	3%	3%	4%
DK/Prefer not to say	17%	15%	9%	20%	19%	13%	15%	16%	37%

QD6. Can you provide an approximate percentage of individuals in your company with a senior management role that might identify as a visible minority?
Base: All respondents, n=850.

Appendices

Appendix A: Recruitment screener for focus groups with consumers

Specifications

- Recruit 8 participants per group, for 6 to 8 to show
- Participants to be paid $125
- Efforts will be made to ensure participation in each session of individuals responsible for 50% of more of the households food purchases (at least half of the participants in each group)
- 10 online focus groups with individuals at least 18 years of age, from across Canada
- For sessions covering multiple provinces (Atlantic and Prairies), aim for a mix across provinces within each grouping. For sessions that include Territories, aim for 1-2 from the Territory in each session.

<u>All times are stated in local area time unless specified otherwise.</u>

Group 1
Atlantic Canada

February 1
5:00 pm AST
Young Adults (18-34)

Group 2
Prairies (MB/SK/AB/NWT)

February 1
6:00 pm CST
Young Adults (18-34)

Group 3
Atlantic Canada

February 5
5:00 pm AST
Adults (35+)

Group 4
Prairies (MB/SK/AB/NWT)

February 5
6:00 pm CST
Adults (35+)

Group 5
Quebec [FRENCH]

February 6
5:00 pm EST
Young Adults (18-34)

Group 6
Quebec [FRENCH]

February 6
7:00 pm EST
Adults (35+)

Group 7
Ontario/Nunavut

February 8
5:00 pm EST
Young Adults (18-34)

Group 8
BC/Yukon

February 8
5:00 pm PST
Young Adults (18-34)

Group 9
Ontario/Nunavut

February 10
1:00 pm EST
Adults (35+)

Group 10
BC/Yukon

February 10
12:00 pm PST
Adults (35+)

Questionnaire

A. Introduction

Hello/Bonjour, my name is [**NAME**] and I am with Quorus Consulting Group, a national public opinion research company. We're planning a series of online discussion groups on behalf of the Government of Canada with people in your area. Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

[INTERVIEWER NOTE: FOR ENGLISH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN FRENCH, PLEASE RESPOND WITH, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à ces groupes de discussion. Nous vous remercions de votre intérêt." FOR FRENCH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN ENGLISH, PLEASE RESPOND WITH, "Unfortunately, we are looking for people who speak French to participate in this discussion group. We thank you for your interest."]

[INTERVIEWER NOTE 2: IF SOMEONE IS ASKING TO PARTICIPATE IN FRENCH/ENGLISH BUT NO GROUP IN THIS LANGUAGE IS AVAILABLE IN THIS AREA, TALK TO YOUR SUPERVISOR.]

As I was saying – we are planning a series of online discussion groups on behalf of the Government of Canada with people in your area. The research will focus on food product packaging and labelling. The groups will last up to 90 minutes (one and a half hours) and people who take part will receive a cash gift to thank them for their time.

Participation is completely voluntary. We are interested in your opinions. No attempt will be made to sell you anything or change your point of view. The format is a group discussion held using an online web conferencing platform similar to Zoom, led by a research professional with about six to eight other participants invited the same way you are being invited. The use of a computer or a tablet (not a smartphone) in a quiet room is necessary for participation, as the moderator will be gauging reactions to concepts and materials. All opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy.

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: "The information collected through the research is subject to the provisions of the *Privacy Act*, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation."]

1. Before we invite anyone to attend, we need to ask you a few questions to ensure that we get a good mix of people in each of the groups. This will take 5 minutes. May I continue?

Yes	1	**CONTINUE**
No	2	**THANK/DISCONTINUE**

B. Qualification

2. To what extent are you responsible for purchasing groceries for your household? Please choose a value from 0% to 100%

AT LEAST HALF OF THE PARTICIPANTS IN EACH GROUP SHOULD BE RESPONSIBLE FOR 50% OR MORE

3. Do you or does anyone in your immediate family or household work in any of the following areas? **[READ LIST]**

	Yes	No
A marketing research firm	1	2
A magazine or newspaper, online or print	1	2
A radio or television station	1	2
A public relations company	1	2
An advertising agency or graphic design firm	1	2
An online media company or as a blog writer	1	2
The government, whether federal, provincial or municipal	1	2
Commercial farming (including livestock), fishing, or growing fruit, vegetables or grains for commercial purposes	1	2
Food processing, treating, manufacturing or preparation	1	2

IF YES TO ANY OF THE ABOVE, THANK AND TERMINATE

4. In which province or territory do you live in?

Ontario	1
Quebec	2
Saskatchewan	3
Manitoba	4
Alberta	5
British Columbia	6
New Brunswick	7
Nova Scotia	8
Prince Edward Island	9
Newfoundland and Labrador	10
Yukon	11
Nunavut	12
Northwest Territories	13
Prefer not to say	99 **THANK AND TERMINATE**

FOR SESSIONS COVERING MULTIPLE PROVINCES (ATLANTIC AND PRAIRIES), AIM FOR A MIX ACROSS PROVINCES WITHIN EACH GROUPING. FOR SESSIONS THAT INCLUDE TERRITORIES, AIM FOR 1-2 FROM THE TERRITORY IN EACH SESSION.

5. What city or town do you live in? **RECORD:** ______________

6. What is your gender identity? [If you do not feel comfortable disclosing, you do not need to do so] **[DO NOT READ LIST]**

Male	1
Female	2
Transgender Male	3
Transgender Female	4
Non-Binary	5
Prefer to self-describe, please specify: _____	6
Prefer not to say	7

AIM FOR 50/50 SPLIT OF MALE AND FEMALE, WHILE RECRUITING OTHER GENDER IDENTITIES AS THEY FALL

7. We are looking to include people of various ages in the group discussion. May I have your age please? **RECORD AGE:** ______________

AGE	GROUP	RECRUITMENT SPECIFICATIONS	
18-34	YOUNG ADULT GROUPS	Under 18	**THANK/DISCONTINUE**
		18-34	**MIX OF AGES**
35+	ADULT GROUPS	35+	**MIX OF AGES**

8. What is the highest level of education that you have completed?

Some high school	1
Completed high school	2
Some college	3
Graduated from college	4
Some university	5
Graduated from university	6

9. Do you…
    a. have any food allergies, intolerances or sensitivities? (**IF NEEDED:** This would include intolerance to gluten, lactose, etc.)

    b. follow a special diet unrelated to food allergies or sensitivities? (**IF NEEDED:** This could include vegetarian, vegan, kosher, halal, keto, etc.)

Yes	1
No	2

10. Do you currently live in… **[READ LIST]**

A city or metropolitan area with a population of at least 100,000	1
A city with a population of 30,000 to just under 100,000	2
A city or town with a population of 10,000 to just under 30,000	3
A town or rural area with a population of less than 10,000	4

FOR EACH GROUP, RECRUIT ~2 INDIVIDUALS WHO LIVE IN A CITY OR TOWN WITH A POPULATION OF NO MORE THAN 30,000 (Q10=3 or 4)

11. We want to make sure we speak to a diversity of people. Do you identify as any of the following? **SELECT ONE**

An Indigenous person from Canada (First Nations, Inuit or Métis)	1
A member of an ethnocultural or a visible minority group other than an Indigenous person	2
None of the above	3

AIM FOR REPRESENTATION OF INDIGENOUS AND RACIALIZED COMMUNITIES ACROSS ALL SESSIONS COMBINED

12. **[ASK ONLY IF Q11=2]** What is your ethnic background?

    RECORD ETHNICITY: _______________

13. Have you ever attended a discussion group or taken part in an interview on any topic that was arranged in advance and for which you received money for participating?

Yes	1	
No	2	**GO TO Q17**

14. When did you last attend one of these discussion groups or interviews?

Within the last 6 months	1	**THANK & TERMINATE**
Over 6 months ago	2	

15. Thinking about the groups or interviews that you have taken part in, what were the main topics discussed?

RECORD: _______________

THANK/TERMINATE IF RELATED TO FOOD SAFETY/ FOOD FRAUD/ CANADIAN FOOD INSPECTION AGENCY

16. How many discussion groups or interviews have you attended in the past 5 years?

Fewer than 5	1	
Five or more	2	**THANK & TERMINATE**

17. Participants in group discussions are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in an online group discussion? Are you... **READ OPTIONS**

Very comfortable	1	**MIN 5 PER GROUP**
Fairly comfortable	2	
Not very comfortable	3	**THANK & TERMINATE**
Very uncomfortable	4	**THANK & TERMINATE**

18. Do you have access to a stable internet connection, capable of sustaining a 90-minute online video conference?

Yes	1	
No	2	**THANK & TERMINATE**

19. Participants will be asked to provide their answers through an online web conferencing platform using a computer or a tablet (**<u>not a smartphone</u>**) in a quiet room. It is necessary for participation, as the moderator will be gauging reactions to advertising concepts and materials. Is there any reason why you could not participate? (No access to computer or tablet, internet, etc.) If you need glasses to read or a device for hearing, please remember to wear them.

Yes	1	
No	2	**SKIP TO INVITATION**

20. Is there anything we could do to ensure that you can participate?

Yes	1	
No	2	**THANK AND TERMINATE**
DK/NR	9	**THANK AND TERMINATE**

21. What specifically? [OPEN END]

INTERVIEWER TO NOTE FOR POTENTIAL ONE-ON-ONE INTERVIEW

RECRUITER NOTE: WHEN TERMINATING AN INTERVIEW, SAY: "Thank you very much for your cooperation. We are unable to invite you to participate because we have enough participants who have a similar profile to yours."

C. INVITATION TO PARTICIPATE

22. I would like to invite you to participate in an online focus group session where you will exchange your opinions in a moderated discussion with other individuals in your region. The discussion will be led by a researcher from the national public opinion research firm, Quorus Consulting. The session will be recorded but your participation will be confidential. The group will be hosted using an online web conferencing platform, taking place on [DAY OF WEEK], [DATE], at [TIME]. It will last 90 minutes (one and a half hours). People who attend will receive $125 to thank them for their time.

    Would you be interested in taking part in this study?

Yes	1	
No	2	**THANK & TERMINATE**

23. The discussion group will be video-recorded. These recordings are used to help with analyzing the findings and writing the report. The results from the discussions will be grouped together in the research report, which means that individuals will not be identified in anyway. Is this acceptable?

Yes	1	
No	2	**THANK & TERMINATE**

24. Individuals from the Canadian Food Inspection Agency (CFIA) and/or the Government of Canada involved in this research project may be observing the session. They will not take part in the discussion, and they will not know your full name. Is this acceptable?

Yes	1	
No	2	**THANK & TERMINATE**

25. The recordings may also be used by the CFIA client team solely for presenting research findings internally however you would not be identified by name and nobody from the client team would contact you as a result of any feedback you provide. Is this acceptable?

Yes	1	
No	2	**THANK & TERMINATE**

26. Thank you. Just to make sure, the group will take place on **[DAY OF WEEK]**, **[DATE]**, at **[TIME]** and it will last 90 minutes (one and a half hours). Following your participation, you will receive $125 to thank you for your time. Are you interested and available to attend?

Yes	1	
No	2	**THANK & TERMINATE**

To conduct the session, we will be using a screen-sharing application called **Zoom**. **We will need to send you by email the instructions to connect.** The use of a computer or a tablet (**not a smartphone**) in a quiet room is necessary.

We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 to 15 minutes prior to your session.

As we are only inviting a small number of people to attend, your participation is very important to us. If for some reason you are unable to attend, **you cannot send someone to participate on your behalf** - please call us so that we can get someone to replace you. You can reach us at **[INSERT NUMBER]** at our office. Please ask for **[INSERT NAME]**.

So that we can contact you to remind you about the focus group or in case there are any changes, can you please confirm your name and contact information for me? **[READ INFO AND CHANGE AS NECESSARY.]**

First name____

Last Name____

Email____

Day time phone number____________________________________

Night time phone number___________________________________

Thank you!

If the respondent refuses to give his/her first or last name or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the focus group. If they still refuse THANK & TERMINATE.

Appendix B: Recruitment screener for focus groups with food businesses

Specifications

- Recruit 6 participants per group, for 5-6 to show.
- Participants to be paid $200.
- 8 online focus groups with representatives of food businesses in Canada.
- Participants will be employees responsible for regulatory compliance from small, medium, and large-sized food businesses.
  - Ensure a good mix of business lines recruited, including food importers, food exporters, retail, manufacturing businesses, businesses serving businesses (B2B) and companies doing business internationally.
  - There must be some representation from small and medium businesses with female management/ownership, companies started by newcomers or recently immigrated individuals.
- For sessions covering multiple provinces (Atlantic and Prairies), aim for a mix across provinces within each grouping. For sessions that include Territories, aim for 1-2 from the Territory in each session.

<u>All times are stated in local area time unless specified otherwise.</u>

Group 1 **Atlantic Canada**	**Group 2** **Prairies (MB/SK/AB/NWT)**	**Group 3** **Ontario/Nunavut**	**Group 4** **Prairies (MB/SK/AB/NWT)**
February 14 5:00 pm AST	February 14 6:00 pm CST	February 15 5:00 pm EST	February 15 6:00 pm CST
Group 5 **Ontario/Nunavut**	**Group 6** **British Columbia/Yukon**	**Group 7** **Quebec [FRENCH]**	**Group 8** **Quebec [FRENCH]**
February 20 5:00 pm EST	February 20 5:00 pm PST	February 21 5:00 pm EST	February 21 7:00 pm EST

A. Introduction

Hello, my name ________________. I'm calling from Quorus Consulting, a Canadian public opinion research company and we are calling on behalf of the Canadian Food Inspection Agency (CFIA).

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

[INTERVIEWER NOTE: FOR ENGLISH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN FRENCH, PLEASE RESPOND WITH, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à cette recherche. Nous vous remercions de votre intérêt." FOR FRENCH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN ENGLISH, PLEASE RESPOND WITH, "Unfortunately, we are looking for people who speak French to participate in this research. We thank you for your interest."]

From time to time, we solicit opinions by sitting down and talking with people and the business community. We are preparing to conduct a series of these discussions on behalf of the Government of Canada and the CFIA and I would like to speak to the individual in your organization who is most responsible for food safety of the food products that your business sells or produces. Please note this is not a sales call, this important research will help the Government understand industry's views on food safety practices and regulations.

This could be the owner of the company or a manager who oversees the sale of food products, the food safety manager or the quality assurance manager. Are you the right person to speak with?

ONCE APPROPRIATE CONTACT HAS BEEN REACHED – REPEAT INTRO IF NEEDED AND CONTINUE:

We are reaching out to you today to invite you to a research session to share your feedback on the opportunities and challenges the food industry and your company face and the role the Government of Canada plays in relation to these.

Other decision makers from companies located in Canada will be taking part in this research. It is a first-name basis only discussion so nobody, including the Government of Canada, will know the companies being represented. For their time, participants will receive a cash compensation.

Participation is voluntary and all opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy, including the Privacy Act and the Access to Information Act. We are simply interested in hearing your opinions, no attempt will be made to sell you anything. The format would be an online discussion lead by a research professional.

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: "The information collected through the research is subject to the provisions of the Privacy Act, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation."]

But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix/variety of businesses. This should only take about 5 minutes. In case you are uncertain, **all my questions pertain to your company's Canadian operations.** May I ask you a few questions?

Yes	1	**CONTINUE**
No	2	**THANK & TERMINATE**

B. Business and participant profile

1. How would you rate your own level of familiarity with the food safety protocols of the food products that your business sells or produces? Would you say you are...

Very familiar	1
Fairly familiar	2
Not very familiar	3
Not at all familiar	4

RECRUIT A MIX OF THOSE VERY FAMILIAR AND FAIRLY FAMILIAR

IF NOT VERY OR NOT AT ALL FAMILIAR, ASK: "Since this will be one of the themes discussed, is there someone else in your company who would be more familiar with these protocols?"

IF YES, ASK TO SPEAK WITH THAT PERSON INSTEAD

IF NO, THANK AND DISCONTINUE

2. In what province or territory is your company located?

Newfoundland and Labrador	1
Nova Scotia	2
Prince Edward Island	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Yukon	11
Nunavut	12
Northwest Territories	13

3. Which of the following activities apply to your business **[READ LIST - SELECT ALL THAT APPLY]**?

Import food products	1
Export food products	2
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	3
Grade, label or package food for export or to be sent across provincial or territorial borders	4
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	5
Send or convey food products across provincial or territorial borders (wholesaler/ distributors)	6
Sell food products at retail directly to consumers	7
Produce organic food [interviewer note: includes organic meats, dairy, etc.]	8
None of the above	9

IF ONLY CODE "7" AT Q3, FLAG AS "RETAIL ONLY"
<u>RECRUIT A MAXIMUM OF 2 "RETAIL ONLY" PER GROUP</u>

4. **[IF "NONE OF THE ABOVE" IN Q3: Ask]** What would you say is your company's main business activity?

____

____

IF BUSINESS IS RELATED TO FOOD BUSINESS RECODE Q3 AND CONTINUE, OTHERWISE THANK AND TERMINATE
Flag as "FOOD IMPORTERS/EXPORTERS" if SELECTED 1,2,4,5 AT Q3
Flag as "MANUFACTURED FOOD SECTOR" if SELECTED "3" AT Q3

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

1 – [Self-employed]	1	**“MICRO”**
2-4 employees	2	**“MICRO”**
5-10 employees	3	**“SMALL”**
11-99 employees	4	**“SMALL”**
100-499 employees	5	**“MEDIUM”**
500 employees or more	6	**“LARGE”**
Don’t know **[DO NOT READ]**	8	**TERMINATE**
Refused **[DO NOT READ]**	9	**TERMINATE**

IN EACH GROUP, AIM FOR THE FOLLOWING MIX: 4 MICRO/SMALL, 1 MEDIUM, 1 LARGE

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

$30,000 or less per year	1	
Between $30,000 and less than $100,000 per year	2	
Between $100,000 and less than $500,000 per year	3	
Between $500,000 and less than $1 million per year	4	
Between $1 million and less than $5 million per year	5	
$5 million or more per year	6	
Don’t know **[DO NOT READ]**	8	**TERMINATE**
Refused **[DO NOT READ]**	9	**TERMINATE**

7. **[IF Q5 = 1, 2, 3, 4, OR 5]** Are you an owner or manager of this business?

Yes, business owner	1
Yes, a manager of the business	2
No	3

8. Can you please provide me with your job title? ______________________________________

9. What is your gender? [If you do not feel comfortable disclosing, you do not need to do so] **[DO NOT READ LIST]**

Male	1
Female	2
Prefer to self-describe, please specify: _____	3
Prefer not to answer	4

AIM FOR 50/50 SPLIT OF MALE AND FEMALE, WHILE RECRUITING OTHER GENDER IDENTITIES AS THEY FALL

IF Q7= 1 OR 2, RECORD AS FEMALE OWNER/MANAGER – AIM FOR AT LEAST 1 IN EACH GROUP

10. **[ASK IF Q7 = 1 OR 2]** We are looking to invite business owners and managers with different backgrounds as well. In which of the following categories do you belong?

You were born in Canada	1	
You immigrated to Canada within the past 5 years	**2**	**"NEWCOMER"**
You immigrated to Canada over 5 years ago	3	

AIM FOR A MINIMUM OF 6 NEWCOMERS ACROSS ALL FOCUS GROUPS COMBINED

11. Participants in discussion groups are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in front of others? Are you... **READ OPTIONS**

○ Very comfortable	**MIN 5 PER GROUP**
○ Fairly comfortable	
○ Not very comfortable	**TERMINATE**
○ Not at all comfortable	**TERMINATE**

12. Have you ever attended a discussion group or interview on any topic that was arranged in advance and for which you received money for your participation?

○ Yes	**MAXIMUM 5 PER GROUP**
○ No	**GO TO INVITATION**

13. When did you last attend one of these discussion groups or interviews?

o	Within the last 6 months	**TERMINATE**
o	Over 6 months ago	

14. How many discussion groups or interviews have you attended in the past 5 years?

o	Fewer than 5	
o	5 or more	**TERMINATE**

C. INVITATION TO PARTICIPATE

15. I would like to invite you to participate in an online focus group session where you will exchange your opinions in a moderated discussion with other individuals in your region. The discussion will be led by a researcher from the national public opinion research firm, Quorus Consulting. The session will be recorded but your participation will be confidential. The group will be hosted using an online web conferencing platform, taking place on [DAY OF WEEK], [DATE], at [TIME]. It will last 90 minutes (one and a half hours). People who attend will receive $200 to thank them for their time.

    Would you be interested in taking part in this study?

Yes	1	
No	2	**THANK & TERMINATE**

16. The discussion group will be video-recorded. These recordings are used to help with analyzing the findings and writing the report. The results from the discussions will be grouped together in the research report, which means that individuals will not be identified in anyway. Is this acceptable?

Yes	1	
No	2	**THANK & TERMINATE**

17. Individuals from the Canadian Food Inspection Agency (CFIA) and/or the Government of Canada involved in this research project may be observing the session. They will not take part in the discussion, and they will not know your full name. Is this acceptable?

Yes	1	
No	2	**THANK & TERMINATE**

18. The recordings may also be used by the CFIA client team solely for presenting research findings internally however you would not be identified by name and nobody from the client team would contact you as a result of any feedback you provide. Is this acceptable?

Yes	1	
No	2	**THANK & TERMINATE**

19. Thank you. Just to make sure, the group will take place on **[DAY OF WEEK]**, **[DATE]**, at **[TIME]** and it will last 90 minutes (one and a half hours). Following your participation, you will receive $200 to thank you for your time. Are you interested and available to attend?

Yes	1	
No	2	**THANK & TERMINATE**

To conduct the session, we will be using a screen-sharing application called **Zoom**. **We will need to send you by email the instructions to connect.** The use of a computer or a tablet (**not a smartphone**) in a quiet room is necessary.

We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 to 15 minutes prior to your session.

As we are only inviting a small number of people to attend, your participation is very important to us. If for some reason you are unable to attend, **you cannot send someone to participate on your behalf** - please call us so that we can get someone to replace you. You can reach us at **[INSERT NUMBER]** at our office. Please ask for **[INSERT NAME]**.

So that we can contact you to remind you about the focus group or in case there are any changes, can you please confirm your name and contact information for me? **[READ INFO AND CHANGE AS NECESSARY.]**

First name____

Last Name____

Email____

Day time phone number_________________________________

Night time phone number________________________________

Thank you!

If the respondent refuses to give his/her first or last name or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the focus group. If they still refuse THANK & TERMINATE.

Appendix C: Moderation guide for focus groups with consumers

Introduction to procedures (10 minutes)

Thank you all for joining this online focus group!

- Introduce moderator/firm and welcome participants to the focus group.
  - Thanks for attending.
  - My name is [INSERT MODERATOR NAME] and I work with Quorus Consulting, an independent public opinion research firm, and we are conducting research on behalf of the Government of Canada.
  - Today we will be talking about the food you consume and how you perceive its authenticity and accurate representation.
  - The discussion will last approximately 90 minutes.
  - If you have a cell phone or other electronic device, please turn it off.
- Describe focus group.
  - A discussion group is a "round table" discussion, meaning we will discuss something and everyone has an equal chance to express an opinion. We may also be asking you to answer survey questions from time to time to help guide the discussion.
  - My job is to facilitate the discussion, keeping us on topic and on time.
  - Your job is to offer your opinions on the topics I'll be presenting to you tonight/today.
  - Your honest opinion is valued. There are no right or wrong answers. This is not a knowledge test.
  - Everyone's opinion is important and should be respected.
  - We want you to speak up even if you feel your opinion might be different from others. Your opinion may reflect that of other consumers.
  - To participate in this session, please make sure your webcam and your microphone are on and that you can hear me clearly. If you are not speaking, I would encourage you to mute your line to keep background noise to a minimum…just remember to remove yourself from mute when you want to speak!
  - We might use the chat function. [MODERATOR EXPLAINS HOW TO ACCESS THE ZOOM CHAT FEATURE DEPENDING ON THE DEVICE THE PARTICIPANT IS USING]. Let's do a quick test right now - please open the chat window and send the group a short message (for example, Hello everyone). If you have an answer to a

question and I don't get to ask you specifically, please type your response in there. We will be reviewing all chat comments at the completion of this project.

- Explanations.
  - Please note that your identity and anything you say during these groups will remain confidential. We do not attribute comments to specific people. Our report summarizes the findings from the groups but does not mention anyone by name. Please do not provide any identifiable information about yourself.
  - The final report for this session, and others, can be accessed through the Library of Parliament or Library and Archives Canada once it's posted.
  - Your responses will in no way affect your dealings with the Government of Canada.
  - The session is being audio-video recorded for report writing purposes / verify feedback. Short portions of the recordings will also be used internally by the client research team to support their internal communication of the research results.
  - Some of my colleagues involved in this project are watching this session and this is only so they can hear the comments first-hand.
- Please note that I am not an employee of the Government of Canada and may not be able to answer questions about what we will be discussing. If questions do come up over the course of the group, we will try to get answers for you before we wrap up the session.

  Any questions?

INTRODUCTIONS: Let's go around – please tell us your name and a little bit about yourself, such as where you live, who lives with you, what you do for a living, etc.

Overall views on and experiences with food fraud (35 minutes)

Tonight we are going to talk a bit about the foods you purchase and consume from retail establishments, such as a grocery store. We are <u>not</u> referring to anything you would order from a restaurant.

Defining food fraud and looking for information

The first topic I'd like to discuss is "food fraud". Just so we are all on the same page... **[SHOW ON SCREEN]** Food fraud occurs when food is misrepresented.

- In your opinion, what constitutes "food fraud?"
    - Please provide some examples, even if they are fictitious.

- Have you seen, read or heard anything about food fraud over the past year or so?
    - What did you see, read or hear?
    - Where did you see, read or hear that?

- Have any of you recently (past year or so) looked for information about food fraud?

    IF YES:
    - What were the reasons for that research?
    - Where did you look for information?
    - What information were you looking for exactly and did you find what you were looking for?

Level of concern with food fraud

- When you do your grocery shopping, how concerned are you about food fraud?
    - Help me understand your position on this a bit more.
    - Has your level of concern changed at all over time?
        - …if so, in which way(s)?
        - …if so, what has caused this shift over time?

- These days are you more concerned with certain types of foods being subject to fraud/misrepresentation, and if so which ones? Help me understand your position on this a bit more.
    - What about fish?
        - Do you trust that the fish for sale in Canada is labelled properly for the specific type of fish that it is – for instance, that salmon or tuna are properly labelled?
        - Do you trust that the fish for sale in Canada is safe to eat?
        - Has your level of trust in fish labelling changed at all in recent years, for the better or the worse? Why is that?
        - What if I told you that 92.7% of fish sold in Canada are accurately labelled?
        - If fraud occurs in the system between the boat and arriving at your plate, where do you think it happens?

Personal experiences

- Thinking of your own personal experiences, have you ever encountered any sort of food fraud?
    - How did you find out about it / discover that it was food fraud?
    - What did you do as a result?
        - Do you know if your actions led to anything in particular (outcomes, consequences, changes, etc.)? How satisfied were you with the outcome of your actions?

Taking action

- What action would you take if you thought that a food product you purchased was fraudulent or misrepresented? ...what steps would you follow?
- In your opinion, what would be the ideal way for consumers to take action when they encounter food fraud?
    - And what consequences would you expect for the food company responsible for the food fraud?

Views on how food fraud is managed in Canada

- Overall, what are your thoughts on how food fraud is "managed" in Canada?
    - Have your views on this changed at all over time?
        - ...if so, in which way(s)?
        - ...if so, what has caused this shift over time?

- As you may or may not know, the Canadian Food Inspection Agency (CFIA) is responsible for regulating food in Canada and verifying that companies are complying with federal food rules.
    - **SHOW OF HANDS:** How many of you would have instinctively thought to go to the CFIA if you ever encountered food fraud?
    - **SHOW OF HANDS:** Have any of you heard of CFIA's online food concern reporting tool? **MODERATOR TO SHOW A SCREEN SHOT OF THE REPORTING TOOL**

IF SO:

- How did you find out about it?
- What was your experience like?

- In terms of how food fraud is monitored and addressed in Canada, what, if anything, do you feel needs to change?

  PROBE AS NEEDED: What about in terms of…

  - …how closely food companies are monitored? Help me understand what needs to happen/change here.
  - …the consequences or penalties companies face for committing food fraud? Help me understand what needs to happen/change here.
  - …how well consumers need to be informed about food fraud? Help me understand what needs to happen/change here.
  - …the role consumers play, if any, when it comes to food fraud.

Views on food recalls

Let's turn our attention to food recalls in Canada…

- How concerned are you with food recalls in general – let's say that at one end of a 10-point scale you have people who are a "10" – they are constantly on high alert for food recalls and at the other end, you have people who do not pay any attention to them. Where would you be on that scale?
  - Are there certain types of food recalls that concern you the most?

    …any specific products or issues they are concerned about (such as allergens, foodborne illnesses like Salmonella or Listeria, other)
  - How or where do you typically get information about recalls?
  - If you wanted to find recall information online, where would you go?
  - How interested would you be in subscribing to recall email notifications? Where would you sign up for something like this?

Reactions to messaging (15 minutes)

I'd like to get your reactions to some messaging related to food fraud being considered by the CFIA.

First of all, what if you saw something like this on Facebook or another social media that you use? Note that for legal reasons, the post cannot include the name of the company involved. **MODERATOR SHARES ON THEIR SCREEN**

- Overall, what are your initial thoughts and feelings about this type of messaging?
- Is this useful to you in any way? …if so how?
- Does this have any impact on…
    - …your views of the CFIA?
    - …your level of trust in how food safety is managed in Canada?
    - …your level of trust in the food you eat?

- Would you take any particular action after having read this? …like? …comment? …share? …repost?

I’d now like to get your thoughts on the following types of statements that the CFIA could use in some of its communications with Canadians: **MODERATOR SHARES ON THEIR SCREEN**

- Each day, CFIA inspectors work to verify that industry is operating in compliance with Canadian requirements.
- Inspections are targeted in areas of highest risk, including those most at risk for not meeting Canadian standards and regulations.
- This is done all along the supply chain and involves numerous stakeholders and jurisdictions.
- When non-compliance is found, the CFIA takes enforcement action to protect Canadians.
- Consumers can be confident that the food they buy is accurately represented and safe.

- Overall, what are your initial thoughts and feelings about this type of messaging?
- Is this useful to you in any way? …if so how?
- Does this type of messaging have any impact on…
    - …your views of the CFIA?
    - …your level of trust in how food safety is managed in Canada?
- The last statement reads “consumers can be confident that the food they buy is accurately represented and safe” – do the first four bullets help achieve this for you?
    - If so, which statement(s) or words are most impactful?
    - Is there anything you would remove or add so that the statements are more impactful?

Overall views on and experiences with "best before" dates (20 minutes)

Let's turn our attention to "best before" dates and "expiry" dates.

- How confident are you that you understand the difference between these two types of information on food products?
    - In your own words, how would you explain this to someone who was not familiar with these terms?

Just so we are all on the same page **MODERATOR TO SHOW ON SCREEN**

An **expiration date** is the last day a food can safely be consumed.

- Once it expires, it should no longer be eaten because of changes in its nutrition or composition.
- Expiry dates are required on only a small number of specific foods, such as infant formula and meal replacements.

Best before dates are about food freshness, quality and how long they should last unopened, not about food safety.

- Food can still be "good" and eaten even if it's not at its "best".
- Best before dates only apply to unopened products if stored properly.
- Once opened, their shelf life may change, and consumers can use their judgement when deciding whether a food can be eaten.

- Let's focus on "best before" dates. **When you do your grocery shopping**, how much attention do you pay to "best before" dates on products?
    - Help me understand your position on this a bit more.
    - Has the importance you place on "best before" dates changed at all over time?
        - …if so, in which way(s)?
        - …if so, what has caused this shift over time?

- **When you are shopping**, are you more concerned with the "best before" dates on certain types of foods, and if so which ones?
    - Help me understand your position on this a bit more.

- How about **after a food product is in your home** - how much attention do you pay to "best before" dates on products?
    - Help me understand your position on this a bit more.
    - Has the importance you place on "best before" dates on food products in your cupboard and in your refrigerator changed at all over time?
        - …if so, in which way(s)?
        - …if so, what has caused this shift over time?

- When you are looking at **what is in your refrigerator and in your cupboard**, are you more concerned with the "best before" dates on certain types of foods, and if so which ones?
    - Help me understand your position on this a bit more.

- What do you do if a food product has passed its "best before" date?
    - Help me understand what you usually do in these circumstances and whether your actions differ based on the type of food.

- How would you feel if "best before" dates were removed entirely on food products?
    - Does your reaction depend on the type of food?

Wrap-up (10 minutes)

We've spent the entire session talking about food!! These days, where do you typically get information on food in general? This can be about any aspect of food such as nutrition, food safety, recipes and can be any source – online, at stores, social media, etc.

PROBE AS NEEDED:

Do you…

- …use social media at all (for example, Facebook, X (Twitter), LinkedIn, Instagram, Pinterest)? In what ways?
    - Social media friends?
    - Follow the CFIA?
    - Follow certain food-related groups?
- …research food things on YouTube? Do you have any examples?
- What about posters and billboards when you are out and about town, in stores, malls, restaurants, etc.? Do you have any examples?
- What are some of the more common websites you might use to find food information?

Thanks again! The team that invited you to participate in this session will contact you regarding the manner in which you can receive the incentive we promised you.

Thank you – have a nice evening!

Appendix D: Moderation guide for focus groups with food businesses

Introduction to procedures (10 minutes)

Thank you all for joining this online focus group!

- Introduce moderator/firm and welcome participants to the focus group.
    - Thanks for attending.
    - My name is [INSERT MODERATOR NAME] and I work with Quorus Consulting, an independent marketing research company, and we are conducting research on behalf of the Government of Canada / CFIA.
    - Today we will be talking about food regulation in Canada, some of the challenges your business might encounter and the CFIA.
    - The discussion will last approximately 90 minutes.
    - If you have a cell phone or other electronic device, please turn it off.
- Describe focus group.
    - A discussion group is a “round table” discussion, meaning we will discuss something and everyone has an equal chance to express an opinion. We may also be asking you to answer survey questions from time to time to help guide the discussion.
    - My job is to facilitate the discussion, keeping us on topic and on time.
    - Your job is to offer your opinions on the topics I’ll be presenting to you tonight/today.
    - Your honest opinion is valued. There are no right or wrong answers. This is not a knowledge test.
    - Everyone’s opinion is important and should be respected.
    - We want you to speak up even if you feel your opinion might be different from others. Your opinion may reflect that of other consumers.
    - To participate in this session, please make sure your webcam and your microphone are on and that you can hear me clearly. If you are not speaking, I would encourage you to mute your line to keep background noise to a minimum…just remember to remove yourself from mute when you want to speak!
    - We might use the chat function. [MODERATOR EXPLAINS HOW TO ACCESS THE ZOOM CHAT FEATURE DEPENDING ON THE DEVICE THE PARTICIPANT IS USING]. Let’s do a quick test right now - please open the chat window and send the group a short message (for example, Hello everyone). If you have an answer to a

question and I don’t get to ask you specifically, please type your response in there. We will be reviewing all chat comments at the completion of this project.

- Explanations.
    - Please note that anything you say during these groups will be held in the strictest confidence. We do not attribute comments to specific people. Our report summarizes the findings from the groups but does not mention anyone by name. Please do not provide any identifiable information about yourself.
    - The final report for this session, and others, can be accessed through the Library of Parliament or Library and Archives Canada once it’s posted.
    - Your responses will in no way affect your dealings with the Government of Canada.
    - The session is being audio-video recorded for report writing purposes / verify feedback. Short portions of the recordings will also be used internally by the client research team to support their internal communication of the research results.
    - Some of my colleagues involved in this project are watching this session and this is only so they can hear the comments first-hand.
- Please note that I am not an employee of the Government of Canada and may not be able to answer questions about what we will be discussing. If questions do come up over the course of the group, we will try to get answers for you before we wrap up the session.

  Any questions?

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

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

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

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

Outcome based regulations

- Have you heard the term "outcome-based regulations?
    - What does this mean to you? Can you describe or provide an example?

Basically, an outcome-based regulation is one that specifies the desired result that a regulation is intended to achieve, rather than describing a specific process or action that must be followed to achieve compliance, which are known as prescriptive regulations.

- What do you think of outcome-based regulations?
    - **PROBE:** positive versus negative thoughts
    - **PROBE:** How confident are you that your company can properly incorporate these types of regulations in your operations?
- If a company can prove that their food is safe, would you say it meets the regulations or not?

Safe Food for Canadian Regulations (SFCR) (15 minutes)

Let's turn our attention to specific regulations that the CFIA enforces: The *Safe Food for Canadians Regulations*.

- Who in the group has heard of these regulations?
    - Would you describe these as outcome-based regulations?
    - To the best of your knowledge, what are the key safety requirements in the SFCR?

According to the CFIA some of the key elements are: hazards, preventive controls, sanitation controls, building maintenance, licensing and traceability.

- Generally, how easy or difficult is it for your business to comply with food regulations in Canada?
    - How easy or difficult is it to comply with food regulations as they apply for e-commerce/online sales and importing?
- What are some of the main challenges your business faces? What do you think is behind these challenges?
- What do you think is behind some of the success your business has experienced in meeting food regulations in Canada?
- Is there any other area related to the SFCR that has been challenging for your business or perhaps may seem problematic in the near future?

CFIA role in food safety regulation (15 minutes)

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

- In your own words, what is the role of the CFIA? **MODERATOR TO GET FEEDBACK FROM A FEW PARTICIPANTS**
- Specifically in terms of helping your business comply with food regulations in Canada, in what ways, if any, do you feel the CFIA has supported your business or made it easier for your company to comply?

Best-before dates:

- What are your thoughts on the current requirement for best before dates?
    - **PROBE**: What benefits, if any does your business experience from having best before dates on your products?
    - **PROBE**: What purpose do best before dates serve for your company?

- Have you established a connection between Best Before Dates and Food Waste?
    - **PROBE:** What regulatory requirements would you change, if any, to assist with the goal of reducing food waste in businesses like yours?
    - **PROBE:** What do you see as the major causes of food waste?
- If Best Before Date requirements were removed, what impact would it have on your business?
    - **Probe as needed:** What might be negative impacts? What might be positive impacts?

Food fraud:

Next, I'd like to explore your thoughts about food fraud.

For context, food fraud may occur when food is misrepresented. It can pose serious health risks if, for example, unidentified allergens or hazardous materials are added to food products. It can also have an economic impact on the buyer (for example, paying for a product that is actually of lower quality).

There are 4 main types of food fraud including:

- **Substituting**
- **Adulterating or diluting**
- **Mislabelling**
- **Making false claims or misleading statements**

- In your business, have you experienced, observed, or been impacted by food fraud? Please explain the circumstances and if you took any actions as a result.
- If you suspected a fellow industry member was committing food fraud, would you report it to the CFIA?
    - What are some of the key factors you would take into consideration in your decision to report this type of incident to the CFIA?

- What are the main preventive controls you have in place to ensure you avoid any misrepresentation or possible fraud?
    - How do you ensure the net quantity declared on your products is accurate?
    - What controls do you have in place to ensure that you don’t receive, buy or use ingredients that are misrepresented or adulterated?
- Have you received consumer complaints related to misrepresented food or food fraud?
    - Irrespective of whether you have received any complaints, what procedures do you have in place to address these?
- How do you feel about the possibility of CFIA publishing more information about misrepresented products identified through inspection activities?
    - **PROBE**: What kind of information do you think would be helpful in CFIA’s efforts against food fraud?
    - What about publishing the names of brands or companies that have been found to have committed food fraud?
- How confident are you that the products you sell are properly labelled?
    - If not, at what step of the supply chain do you think mislabelling most occurs?
- By a quick show of hands, how many of you sell fish or seafood products?

    IF YES:

    - How confident are you that the fish and seafood products you sell are properly labelled for type of fish when it comes to the common name? For instance, that if the label says salmon, it is actually salmon in the package.
    - If not, at what step of the supply chain do you think mislabelling most occurs?

CFIA tools (30 minutes)

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

CFIA Website

- Have you been to the CFIA website in the last couple of years? **SHOW OF HANDS**

  SHARE SCREEN AND SHOW PARTICIPANTS MAIN PAGE

  IF YES:

  - Do you have any feedback on the website?
- Did you notice the virtual assistant?
  - Have you used this tool?
  - Thoughts? How did it do?

My CFIA

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

- Have you ever used this service?
  - **IF YES**: thoughts?
  - **IF NO**: Did you know it existed? What do you think of it?

Ask CFIA

- Have any of you reached out to contact CFIA through the website?
- Where did you go?
- [Show contact us form] Does this page look familiar?
- Are you aware of a service offered by the CFIA called “Ask CFIA”?

- Have you ever used this service?

  IF YES:

  - Do you remember what you used it for or what information you were trying to find?
  - What was your experience like? How satisfied were you with the guidance you received through this service?

Effectiveness of SFCR communications (5 minutes)

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

- How would you describe the communications you receive from the CFIA?
  - More specifically, how would you describe the communications you received from the CFIA regarding the SFCR?
    - Is there something you feel they do really well?
- Moving forward, how can communication from the CFIA be improved?

Thank and close (2 minutes)

[MODERATOR CHECKS WITH CLIENT TEAM REGARDING ANY NEW QUESTIONS / CLARIFICATIONS NEEDED]

In parting, is there anything that you think I should have asked but I didn't?

Thanks again! The team that invited you to participate in this session will contact you regarding the manner in which you can receive the incentive we promised you. And have a great evening!

Appendix E: Questionnaire for telephone surveys with food businesses

Quota management

- Select sample to call at random, from businesses on list of approved NAICS codes (n=850)
- Employees responsible for regulatory compliance from small, medium, and large-sized food businesses
- Food importers
- Food import brokers
- Food exporters
- Employees responsible for regulatory compliance from businesses in the manufactured food sector
- Representation from all provinces and territories in Canada. The regional distribution of the interviews will follow the natural distribution of the targeted industry verticals.

Introduction

Hello/Bonjour [**IN QUEBEC**: Bonjour/Hello], (**PAUSE**…) I am calling on behalf of the Government of Canada as we are conducting a brief survey of food businesses. I want to assure you that this is not a sales call. It is research sponsored by the Government of Canada. The survey we're conducting is voluntary, confidential and anonymous. This important research will help the Government understand industry's views on food safety practices and regulations. I won't ask your name, but I am asking for 15 to 20 minutes of your time.

I am hoping to speak with the person in your company who is most responsible for the safety of the food products that your business imports, produces or sells. This could be the owner of the company or a manager who oversees the sale of food products, the food safety manager or quality assurance manager. Are you the right person to speak with?

[**IF NO**: Can you please direct me to the correct person?] **[REPEAT FROM BEGINNING IF TRANSFERRED]**

[ONCE CORRECT PERSON IDENTIFIED]
Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

[NOTE: IF AT THIS POINT THE RESPONDENT PREFERS TO RESPOND IN FRENCH, THEN THE INTERVIEWER MUST BE ABLE TO EITHER PROCEED WITH THE INTERVIEW IN FRENCH OR READ THE FOLLOWING STATEMENT: "Je vous remercie. Quelqu'un vous rappellera bientôt pour mener le sondage en français."]

My name is _____ calling from ______________________. The Government of Canada has hired our company to do the survey.

The survey will take about 15 to 20 minutes to complete. We can call back at a more convenient time if you prefer [**IF SO**: Schedule a follow up call]. The information you provide will be administered according to the requirements of the *Privacy Act and the Personal Information Protection and Electronic Documents Act*. This is designed to protect your privacy.

PERSUADE IF NEEDED: This survey is registered with the Canadian Research Insights Council (CRIC). Should you have any questions about the survey, I can give you a contact person within the CFIA: Ric Hobbs, 613-462-7022.

Screeners and classification

S1. [Record from sample – not asked] Province/territory

S2. [Record from sample – not asked] Full 8-digit North American Industry Classification System (NAICS) code

Let's start with a few questions to help determine the nature and size of your business…

S3. Which of the following best represents the number of people your company employs in Canada, including yourself? If you are a franchisee, please only consider your location. **[READ LIST] [Including part-time and casual employees]**

1 – [Self-employed]	1
2-4 employees	2
5-10 employees	3
11-99 employees	4
100-499 employees	5
500 employees or more	6
Don't know / Prefer not to say **[DO NOT READ]**	9

S4. Which of the following categories best describes your business? **[READ LIST – SELECT ONLY ONE]**

Agriculture	1
Processor or Manufacturer	2
Wholesaler or distributor	3
Retailer	4
Other (please specify): _______________ **[DO NOT READ]**	77

S5. Does your business do any of the following? **[READ LIST – SELECT ALL THAT APPLY]**

Import food products	1
Export food products	2
Send food products to another province or territory [**IF ASKED:** For example, selling, wholesaling, distributing]	3
None of the above **[DO NOT READ]**	99

[ASK IF S5 = 1]

S6. Do you import food products yourself or through a broker? **[READ LIST]**

Import ourselves	1
Import through a broker	2
Both	3
Other	4
Don't know / Prefer not to say **[DO NOT READ]**	99

S7. And does your business do any of the following? **[READ LIST – SELECT ALL THAT APPLY]**

Prepare, package or label food for sending to another province/territory or country	1
Prepare, package or label food for sale or trade within your province/territory	2
None of the above **[DO NOT READ]**	99

S8. And does your business conduct any of the following? **[READ LIST – SELECT ALL THAT APPLY]**

Sell food directly to consumers [**IF ASKED:** This would mean you have a store front]	1
Sell food products online	2
None of the above **[DO NOT READ]**	99

[ASK IF S8 = 2 SELL FOOD PRODUCTS ONLINE]

S9. Do you…? **[READ LIST – SELECT ALL THAT APPLY]**

Sell food products online within your province/territory	1
Sell food products online to other provinces or other countries	2
None of the above **[DO NOT READ]**	99

[CODE AS "RETAIL ONLY" IF: S4=4 AND "NONE OF THE ABOVE AT S5 – MAXIMUM OF N = 300 RETAIL ONLY]

[FLAG AS "INTRAPROVINCIAL ONLY" IF SELECT "2" AT S7 AND SELECT "NONE OF THE ABOVE" IN S5 AND S8 – THANK AND TERMINATE]

[IF "NONE OF THE ABOVE" IN S5, S7, AND S8 – THANK AND TERMINATE]

S11. Which of the following foods does your company deal with? **[READ LIST – SELECT ALL THAT APPLY]**

RANDOMIZE 1-9

Dairy products	1
Egg and processed egg products	2
Fish	3
Fresh fruits or vegetables	4
Honey	5
Maple syrup or maple products	6
Meat products and food animals	7
Processed fruit or vegetable products	8
Manufactured foods [**IF ASKED:** This would include confectionary, snack foods, beverages, fats and oils, infant food, nuts, seeds, spices, condiments, cereals and pastas]	9
Or anything else? **[SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]**	77

Q1AA. Thinking about the past two years, have the following been a high, medium or low priority for your company?

RANDOMIZE

a. Managing regulatory issues

b. Managing public trust and corporate reputation

c. Implementing technology or innovation solutions

Low priority	1
Medium priority	2
High priority	3
None of the above **[DO NOT READ]**	99

Awareness of food safety regulations

Let's turn to the subject of food safety regulations, specifically the ones that are overseen by the Canadian Food Inspection Agency, commonly known as the CFIA.

AA1. How familiar would you say your company is with the activities of the Canadian Food Inspection Agency? Please use a number between 1 and 7, where 1 means "not at all familiar" and 7 means "very familiar". **[REPEAT SCALE AS NEEDED]**

Not at all familiar	1
	2
	3
	4
	5
	6
Very familiar	7
Don't know / Prefer not to say **[DO NOT READ]**	99

A1. On a scale from 1 to 7, where 1 means "not at all clear" and 7 means "very clear", how well do you feel you understand the food safety regulations that apply to your business? **[REPEAT SCALE AS NEEDED]**

Not at all clear	1
	2
	3
	4
	5
	6
Very clear	7
Don't know / Prefer not to say **[DO NOT READ]**	99

A2. Have you seen, read or heard anything about the *Safe Food for Canadians Regulations*?

Yes	1
No **[SKIP TO A8]**	2
Don't know / Prefer not to say **[DO NOT READ]** **[SKIP TO A8]**	99

[ASK IF A2=1]

A3. Where did you hear, see or read about the regulations? **[ACCEPT MULTIPLE RESPONSES IF OFFERED – LIMIT TO 3 SOURCES]**

____

Don't know / Prefer not to say **[DO NOT READ, PROMPT IF NECESSARY]**	99

A4. As far as you know, do you think the *Safe Food for Canadians Regulations* apply to your business?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

A5. As far you know do you think the *Safe Food for Canadians Regulations* apply to on-line sales of food products?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

A5A. To the best of your knowledge what are the key safety requirements in the SFCR? **[ACCEPT MULTIPLE RESPONSES] [IF NEEDED:** *Safe Food for Canadians Regulations***]**

____

[**ASK IF S5=1**]

A6. Were you aware that a Safe Food for Canadians licence is required to import food products into Canada? Would you say you were… **[READ LIST]**

Clearly aware of this requirement	1
Somewhat or vaguely aware, or,	2
Not aware of this requirement	3
Don't know / Prefer not to say **[DO NOT READ]**	99

[SKIP IF RETAIL-ONLY]

A7. From your perspective, which of the following food safety requirements of the SFCR is your biggest challenge? Would it be…? **[SINGLE RESPONSE]**

RANDOMIZE 1-5

Obtaining or maintaining a Safe Food for Canadians Licence	1
Implementing preventive controls	2
Maintaining a written preventive controls plan	3
Maintaining traceability records	4
Implementing traceability labelling on products	5
Other **[SPECIFY] [DO NOT READ]**	77
None of these are challenges **[DO NOT READ]**	99

A8. Do you use a private food safety or quality control certification system such as GFSI, ISO or QMP? [**IF ASKED:** GFSI = Global Food Safety Initiative; ISO = International Organization for Standardization and QMP = Quality Management Program]

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

A9. Which of the following items, if any, does your company have? **[READ LIST – SELECT ALL THAT APPLY]**

Safe Food for Canadians Licence	1
Preventative controls, but not a written plan	2
A written preventative controls plan	3
Traceability documents	4
Traceability labelling [**IF ASKED:** This is information on the label of a product that allows both you and your customers to identify whether a particular food is subject to a recall]	5
None of above **[DO NOT READ]**	98
Don't know / Prefer not to say **[DO NOT READ]**	99

Transparency

[SKIP IF AA1 < 4]

T1-2. In your opinion, how transparent do you think the CFIA is when it comes to each of the following? Please answer on a scale of 1 to 7, with 1 being not at all transparent, and 7 being very transparent. **[REPEAT SCALE AS NEEDED]**

RANDOMIZE T1-T2

T1. Determining if there are non-compliances of regulations
T2. Reporting and publishing non-compliance results

Not at all transparent	1
	2
	3
	4
	5
	6
Very transparent	7
Don't know / Prefer not to say **[DO NOT READ]**	99

Best-before dates

B1. Let's turn our attention to Best-before date requirements. Does your business experience any benefits from best before date requirements?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

B2. Does your business experience any negative impacts from best before dates requirements?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

B3. Do you believe there is a connection between best before dates and food waste?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

B5. If the requirement to have best before dates was eliminated, would the impact on your business be very negative, somewhat negative, neutral, somewhat positive, or very positive? **[REPEAT SCALE AS NEEDED]**

Very negative	1
Somewhat negative	2
Neutral	3
Somewhat positive	4
Very positive	5
Don't know / Not applicable **[DO NOT READ]**	99

Food fraud

FF1. We now have a few questions about food fraud. For context, food fraud may occur when food is misrepresented.

As a food business, how concerned are you with food fraud? Please use a number between 1 and 7, where 1 means "not at all concerned" and 7 means "very concerned". **[REPEAT SCALE AS NEEDED]**

Not at all concerned	1
	2
	3
	4
	5
	6
Very concerned	7
Don't know / Prefer not to say **[DO NOT READ]**	99

FF2. Has food fraud affected your business?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

FF3. If you suspected a fellow industry member was committing food fraud, how likely would you be to report it to the CFIA? Please use a number between 1 and 7, where 1 means "not at all likely" and 7 means "very likely". **[REPEAT SCALE AS NEEDED]**

Not at all likely	1
	2
	3
	4
	5
	6
Very likely	7
Don't know / Prefer not to say **[DO NOT READ]**	99

FF4. Do you know how to report suspected food fraud to the CFIA?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

FF5. Have you received consumer complaints (whether they were well founded or not) related to food fraud or misrepresented food?

Yes	1
No	2
Don't know/Not sure **[DO NOT READ]**	99

[ASK IF RETAIL ONLY OR S11=3 “FISH”]

FF6. How confident are you that the fish and seafood products you sell are properly labelled for type of fish when it comes to the common name? Please use a number between 1 and 7, where 1 means “not at all confident” and 7 means “very confident”.

IF NEEDED: For example, that if your product says it is tuna, that is it actually tuna.

[REPEAT SCALE AS NEEDED]

Not at all confident	1
	2
	3
	4
	5
	6
Very confident	7
I don’t sell fish or seafood **[DO NOT READ]**	98
Don’t know / Prefer not to say **[DO NOT READ]**	99

FF8. Considering all the food products you sell, how confident are you that they are properly labelled? Please use a number between 1 and 7, where 1 means “not at all confident” and 7 means “very confident”. **[REPEAT SCALE AS NEEDED]**

Not at all confident	1
	2
	3
	4
	5
	6
Very confident	7
Don’t know / Prefer not to say **[DO NOT READ]**	99

FF9. At what step of the supply chain do you think mislabelling of food products is most likely to occur? **[READ LIST – SELECT ONLY ONE OPTION]**

Domestic processor / manufacturer	1
The importer	2
Pre-import (in another country)	3
At retail	4
At wholesale	5
At the restaurant	6
Other **[SPECIFY] [DO NOT READ]**	77
Don't know / Prefer not to say **[DO NOT READ]**	99

Information search and understanding

I1. How often do you look for information about food safety regulations or requirements of any kind? Would you say… **[READ LIST]**

Daily	1
Weekly	2
Monthly	3
Quarterly	4
Annually	5
Less often than annually	6
Never	98
Don't know / Prefer not to say **[DO NOT READ]**	99

I2. What specific source of information about food safety regulations or requirements do you go to most often? **[ENTER VERBATIM – ACCEPT ONLY ONE RESPONSE]**

____

I3. What other sources or types of information about food safety regulations do you use or have you used in the past? **[DO NOT READ LIST – SELECT ALL THAT APPLY]**

[NOTE: IF TWITTER, INSTAGRAM, OR FACEBOOK SELECTED PRODUCE MERGED SOCIAL MEDIA CODE FOR DATA TABLES]

Internet/website (SPECIFY: _______)	1
Google search	2
Twitter	3
Instagram	4
Facebook	5
Media (TV, newspaper, magazine)	6
Canadian Food Inspection Agency (CFIA)	7
Government of Canada	8
Provincial government	9
Industry association	10
Colleagues/other producers/my network	11
Or anything else? **[SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]**	77
Don't know / Prefer not to say **[DO NOT READ – EXCLUSIVE]**	99

I4A. Have you received any information from the CFIA in the past year?

Yes	1
No **[SKIP TO I9]**	2
Don't know/Not sure **[DO NOT READ]** **[SKIP TO I9]**	99

I4B. How has your business received information from the CFIA in the past year? **[DO NOT READ LIST – SELECT ALL THAT APPLY]**

Mail documents/letters	1
Telephone calls	2
Email notifications	3
Notices in My CFIA portal	4
Personal interaction with CFIA representative	5
CFIA website	6
CFIA social media	7
Through an industry association	8
Or anything else? **[SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]**	77
Don't know / Prefer not to say **[DO NOT READ]**	99

I5. Overall, how satisfied are you with the communications you have received from CFIA? Please use a number between 0 and 10, where 0 means "not at all satisfied" and 10 means "very satisfied".

Not at all satisfied	0
	1
	2
	3
	4
	5
	6
	7
	8
	9
Very satisfied	10
Don't know / Prefer not to say **[DO NOT READ]**	99

I6. Why do you give CFIA a rating of **[PIPE RESPONSE FROM I5]** out of 10 for its communications with you?

____

I7. Would you say the frequency with which you get communications from the CFIA is…? **[READ LIST]**

Too often	1
About right	2
Not often enough	3
Don't know / Prefer not to say **[DO NOT READ]**	99

[SKIP IF I4A = 2 OR 99]

I8. To what extent do you agree or disagree with the following statements about communications from CFIA? Do you strongly disagree, somewhat disagree, somewhat agree, or strongly agree that… **[REPEAT SCALE AS NEEDED]**

RANDOMIZE A-B

a. communications provided from CFIA are clear and easy to understand?

b. communications provided from CFIA are helpful and give you the information you need to know?

Strongly disagree	1
Somewhat disagree	2
Somewhat agree	3
Strongly agree	4
Don't know / Prefer not to say **[DO NOT READ]**	99

[ASK ALL]

I9. In the future, how would you most prefer that CFIA get you the information you need to know? **[DO NOT READ LIST – SELECT ONLY ONE OPTION – MOST PREFERRED]**

By mail	1
Telephone	2
Email	3
Notices in My CFIA portal	4
Personal interaction with CFIA representative	5
CFIA website	6
Social media (SPECIFY: ________)	7
Newsletter	8
Through an industry association	9
Or anything else? **[SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]**	77
I don't want the CFIA to send me future communications **[DO NOT READ]**	98
Don't know / Prefer not to say **[DO NOT READ]**	99

I12. Over the past few years, have you had difficulty getting information you needed from CFIA?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

[ASK IF I12 = 1]

I13. What specific topics did you have difficulty getting information on?

____

I14. Some food safety regulations are "outcome-based". How clear is the concept of "outcome-based" regulations to you personally? Please answer on a scale of 1 to 7, with 1 being not at all clear and 7 being very clear. **[REPEAT SCALE AS NEEDED]**

Not at all clear	1
	2
	3
	4
	5
	6
Very clear	7
Don't know / Prefer not to say **[DO NOT READ]**	99

I16. To the best of your knowledge, would you say the SFCR are an outcomes-based regulation? **[IF NEEDED:** *Safe Food for Canadians Regulations***]**

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

Ask CFIA

C4. "Ask CFIA" provides the food industry with one point of entry through the "Contact us" page of the CFIA website. Canadian food businesses and non-resident importers can submit questions about food regulatory requirements using an online form and "Ask CFIA" provides written answers.

Based on this definition, have you used the Ask CFIA service?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

[SKIP TO DEMOS IF C4 = 2 OR 99]

C5. In the last year, how many times have you used the Ask CFIA service? **[PROMPT FOR ESTIMATE]**

Did not use in past year	1
1 time	2
2 times	3
3 times	4
4 times	5
5 or more	6
Don't know / Prefer not to say **[DO NOT READ]**	99

C7. Rate your overall level of satisfaction with the Ask CFIA service. Please use a scale of 1 to 7, where 1 means "not at all satisfied" and 7 means "very satisfied". **[REPEAT SCALE AS NEEDED]**

Not at all satisfied	1
	2
	3
	4
	5
	6
Very satisfied	7
Don't know / Prefer not to say **[DO NOT READ]**	99

[ASK IF C7 = 1 TO 7]

C8. Why do you give the Ask CFIA service a rating of **[PIPE RESPONSE FROM C7]** for overall satisfaction?

____

Demographics / Language requirements

Thank you for your answers. We just have a few final demographic questions to classify your responses.

D3. Would you classify your company as Indigenous-owned or -operated?

Yes	1
No	2
Don't know / Prefer not to say **[DO NOT READ]**	99

D4. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. **[READ LIST]** [**IF REFUSE:** Just as a reminder, please understand that we use this information for classification purposes only and do not record or share the identity of any company participating in the study.]

$30,000 or less per year	1
Between $30,000 and less than $100,000 per year	2
Between $100,000 and less than $500,000 per year	3
Between $500,000 and less than $1 million per year	4
Between $1 million and less than $5 million per year	5
$5 million or more per year	6
Don’t know / Prefer not to say **[DO NOT READ]**	9

D5. Can you provide an approximate percentage of individuals in your company with a senior management role that identify as women?

Women __________ % [minimum: 0, maximum: 100]
Don't know / Prefer not to say **[DO NOT READ]** 999

[**PERSUADE IF ASKED**: The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported and in order 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.]

D6. Can you provide an approximate percentage of individuals in your company with a senior management role that might identify as a visible minority?

Visible minority __________ % [minimum: 0, maximum: 100]
Don't know / Prefer not to say **[DO NOT READ]** 999

[**PERSUADE IF ASKED:** The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported and in order to better understand the composition of leadership at 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.]

Conclusion: thank respondent for their time and remind them that the feedback is very valuable to the CFIA.

Appendix F: Questionnaire for online surveys with Canadians

Survey specifications

- Survey duration: 12 minutes
- Target sample: n=1,500
- Special populations:
    - Screening for allergies / diets

Introduction

Thank you for taking the time to participate in this survey.

Vous pouvez également répondre au sondage en français. [link to the French version]

Quorus Consulting Group, a Canadian market research firm, is conducting this survey on behalf of the Government of Canada. This survey will ask you questions about food safety in Canada as well as food product labeling. It will take approximately 10 to 12 minutes of your time to complete.

This is entirely voluntary and your responses will remain confidential and anonymous. There is no attempt here to sell or market anything. The information you provide will be managed in accordance with the requirements of the Privacy Act and the Access to Information Act.
The final report describing the results of this study will be available through Library and Archives Canada (LAC) within 6 months of the survey work's completion.

Contact us for an alternative method to take the survey.

To verify the legitimacy of this study you can visit the CRIC (Canadian Research Insights Council) website and use the following study registration number: 20231010-QU547.

Would you like to participate in our survey?

Yes	1
No **[THANK AND TERMINATE]**	2

Qualifications

Q1. In what year were you born? **[DROP-DOWN BOX 1900-2021]**

Prefer not to say	99

[IF 2003-2021 SELECTED, THANK AND TERMINATE]

Q2. **[ASK IF Q1 = 99]** Would you be willing to indicate in which of the following age categories you belong?

Younger than 18 years old **[THANK AND TERMINATE]**	1
18 to 24	2
25 to 34	3
35 to 44	4
45 to 54	5
55 to 64	6
65 or older	7
Prefer not to say	9

Q3. Which of the following best describes your gender identity? Gender refers to current gender which may be different from sex assigned at birth and may be different from what is indicated on legal documents.

Man	1
Woman	2
You prefer to identify as: ___________	77
Prefer not to say	99

Q4. In which province or territory do you live?

British Columbia	1
Alberta	2
Saskatchewan	3
Manitoba	4
Ontario	5
Quebec	6
New Brunswick	7
Prince Edward Island	8
Nova Scotia	9
Newfoundland and Labrador	10
Yukon	11
Northwest Territories	12
Nunavut	13
Outside Canada **[THANK AND TERMINATE]**	98
Prefer not to say **[THANK AND TERMINATE]**	99

Q5. Which of the following statements best describes your role and responsibility when it comes to grocery shopping for your family or household?

I am solely responsible	1
I share in this responsibility	2
Somebody else in my family or household looks after grocery shopping **[THANK AND TERMINATE]**	3
Prefer not to say	99

Q6. To what extent do the following terms apply to you?

RANDOMIZE	Describes me completely 1	Describes me somewhat 2	Does not describe me at all 3	Don't know / Prefer not to say 9
a) Foodie	○	○	○	○
b) Camper	○	○	○	○
c) Cottager	○	○	○	○
d) Hobby farmer	○	○	○	○
e) Gardener	○	○	○	○
f) Nature enthusiast	○	○	○	○
g) Hiker	○	○	○	○
h) Outdoor enthusiast	○	○	○	○
i) Pet owner	○	○	○	○
j) Animal lover	○	○	○	○
k) Small bird flock owner	○	○	○	○
l) Pet pig owner	○	○	○	○
m) Travel enthusiast	○	○	○	○
n) Travel south for the winter "snowbird"	○	○	○	○
o) Biology or ecology hobbyists and enthusiasts	○	○	○	○

Familiarity with the CFIA

F1. 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.

First: **[SPECIFY]**	1
Second: **[SPECIFY]**	2
Third: **[SPECIFY]**	3
Don't know / Prefer not to say	99

F2. How familiar would you say you are with the activities of the Canadian Food Inspection Agency (CFIA)?

Not at all familiar	1
	2
	3
	4
	5
	6
Very familiar	7
Don't know / Prefer not to say	99

[IF F2<3, TAG RESPONDENT AS "LOW CFIA FAMILIARITY"]

F3. When thinking of organizations that are dedicated to food safety, which of the following come to mind? **[RANDOMIZE – SELECT ALL THAT APPLY]**

The Canadian Food Inspection Agency (CFIA)	1
Municipal food safety regulators (for example, public health inspectors)	2
Provincial food safety regulators (Provincial or Territorial governments)	3
Health Canada	4
Agriculture and Agri-Food Canada	5
Public Health Agency of Canada	6
Businesses	7
Department of Fisheries and Oceans	8
Don't know / Prefer not to say **[ANCHOR AND EXCLUSIVE]**	99

F4. From the following list, indicate which of the following situations you believe the CFIA is involved in? **[RANDOMIZE – SELECT ALL THAT APPLY]**

Checking food products being imported into the country	1
A complaint that a restaurant has a dirty kitchen	2
A person gets food poisoning from cooking and eating undercooked meat	3
Live animals being exported from Canada to other countries to be consumed as food	4
Conducting food safety investigations	5
Issuing food recalls	6
Taking enforcement action against food producers who aren't following Canada's laws	7
None of the above **[ANCHOR AND EXCLUSIVE]**	98
Don't know / Prefer not to say **[ANCHOR AND EXCLUSIVE]**	99

F5. Select all the following that apply to you: **[SELECT ALL THAT APPLY]**

I follow the CFIA on a social media platform	1
I have visited the CFIA website	2
I have contacted the CFIA by phone	3
I have contacted the CFIA by email or through the website	4
I have read articles, or watched videos, from the CFIA	5
In person interaction with a CFIA employee	6
I have a friend or family member who works at the CFIA	7
I subscribe to CFIA food recall notices	8
I have submitted a food safety or labelling concern	9
None of the above **[EXCLUSIVE]**	99

[SKIP TO A1 IF "LOW CFIA FAMILIARITY"]

F6. Have you read seen, heard or read anything recently about the Canadian Food Inspection Agency (CFIA)?

Yes	1
No **[SKIP TO A1]**	2
Don't know / Prefer not to say **[SKIP TO A1]**	99

F7. Where have you seen, heard, or read about the CFIA? **[SELECT ALL THAT APPLY]**

Word of mouth (friends, family, etc.)	1
Social media (not including CFIA social media) **[IF SELECTED SHOW LIST]**	2
Facebook	2A
Instagram	2B
X (formerly Twitter)	2C
TikTok	2D
YouTube	2E
Reddit	2F
A digital assistant (for example, Alexa, Siri, Google)	3
Traditional media (newspapers, TV, radio)	4
Internet (includes online news sites but not social media)	5
Direct contact from the CFIA (includes CFIA social media and visiting the CFIA website)	6
Don't know / Cannot recall **[EXCLUSIVE]**	99

Understanding the CFIA

[SKIP TO A1 IF "LOW CFIA FAMILIARITY" OR F6="NO"]

U1. Thinking about what you have seen, read or heard from the Canadian Food Inspection Agency, indicate how well you understood the information.

Not at all	1
	2
	3
	4
	5
	6
Understood completely	7
Don't know / Prefer not to say	99

U2. 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

a) All businesses are treated fairly by the CFIA
b) As a science-based regulator, the CFIA is believable when it issues a statement
c) CFIA enforcement activities are strong enough to encourage companies to comply with the regulations

Disagree completely	1
	2
	3
	4
	5
	6
Agree completely	7
Don't know / Prefer not to say	99

U3. Of the words listed below, please select the ones that best describe the Canadian Food Inspection Agency (CFIA). **[RANDOMIZE – SELECT ALL THAT APPLY]**

Efficient	1
Transparent	2
Innovative	3
Informative	4
Scientific	5
Fair	6
Dedicated	7
Consistent	8
Trusted	9
Responsive	10
Respectful	11
Collaborative	12
Punitive	13
Caring	14
Global leader	15
Service oriented	16
None of the above **[ANCHOR AND EXCLUSIVE]**	98
Don't know / Prefer not to say **[ANCHOR AND EXCLUSIVE]**	99

Food allergy and sensitivity

A1. Do you have any food allergies or sensitivities? **[SELECT ALL THAT APPLY]**

Yes, myself	1
Yes, somebody in my household	2
No **[EXCLUSIVE]**	3
Don't know / Prefer not to say **[EXCLUSIVE]**	99

[ASK IF A1 = 1 OR 2]

A2. Please select all foods to which you or someone in your household has allergies or sensitivities: [RANDOMIZE – SELECT ALL THAT APPLY]

Milk	1
Eggs	2
Tree nuts	3
Peanuts	4
Shellfish	5
Fin fish	6
Soy	7
Wheat	8
Sesame	9
Caffeine	10
Sulfites	11
Salicylates	12
Amines	13
Mustard	14
Gluten	15
Other, please specify: _______________[ANCHOR]	77
Don't know / Prefer not to say [ANCHOR AND EXCLUSIVE]	99

CFIA's role in food safety awareness

S1. When it comes to safeguarding the **food** sold in Canada, how well do you believe the Canadian Food Inspection Agency is doing?

Not doing well	1
	2
	3
	4
	5
	6
Doing well	7
Don't know / Prefer not to say	99

S2. Over the past few years, have you looked for or read information specifically about food safety or food fraud of any kind?

Yes	1
No	2
Don't know / Prefer not to say	99

[ASK IF S2 = 1]

S3. What sources of information about food safety or food fraud have you recently used? **[SELECT ALL THAT APPLY]**

Word of mouth (friends, family, etc.)	1
Social media (not including CFIA social media) **[IF SELECTED SHOW LIST]**	2
Facebook	2A
Instagram	2B
X (formerly Twitter)	2C
TikTok	2D
YouTube	2E
Reddit	2F
A digital assistant (for example, Alexa, Siri, Google)	3
Traditional media (newspapers, TV, radio)	4
Internet (includes online news sites but not social media)	5
Direct contact from the CFIA (includes CFIA social media and visiting the CFIA website)	6
Don't know / Cannot recall **[EXCLUSIVE]**	99

S4. I believe food recalls illustrate that the food safety system is working.

True	1
False	2
Don't know / Prefer not to say	99

S5. How concerned are you with food recalls in general?

Not at all concerned	1
	2
	3
	4
	5
	6
Very concerned	7
Don't know / Prefer not to say	99

Trusting the CFIA's food safety procedures

P1. 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?

Do not trust at all	1
	2
	3
	4
	5
	6
Trust completely	7
Don't know / Prefer not to say	99

P2. What factors do you consider when deciding if a food can still be eaten? **[RANDOMIZE – SELECT ALL THAT APPLY]**

Best-before date	1
Expiry date	2
How long you've had it	3
How it was stored	4
What kind of food it is	5
Signs of spoilage (e.g. mould, change of colour)	6
Other, please specify: _____________ **[ANCHOR]**	77
Don't know / Prefer not to say **[ANCHOR AND EXCLUSIVE]**	99

P3. Do the terms “best before date” and “expiration date” mean the same thing or different things to you?

They mean the same thing to me	1
They mean different things to me	2
Don’t know / Prefer not to say	99

P4. How confident are you that you know how to use date labels (for example, best-before dates, manufactured on dates, packaged on dates and expiry dates) when judging whether a food can still be eaten?

Not at all confident	1
	2
	3
	4
	5
	6
Very confident	7
Don’t know / Prefer not to say	99

P5. How often do you throw out food when it’s past the best-before date?

Always	1
Often	2
Sometimes	3
Rarely	4
Never	5
Don’t know / Prefer not to say	99

P6. How often do you buy foods that are on discount because the best-before date is approaching?

Always	1
Often	2
Sometimes	3
Rarely	4
Never	5
Don’t know / Prefer not to say	99

P7. Please rate your level of confidence that food sold in Canada is safe.

Not at all confident	1
	2
	3
	4
	5
	6
Very confident	7
Don't know / Prefer not to say	99

P8. When it comes to verifying that food sold in Canada is safe, how well do you believe the Canadian Food Inspection Agency is doing?

Not doing well	1
	2
	3
	4
	5
	6
Doing well	7
Don't know / Prefer not to say	99

[SKIP TO P10 IF "LOW CFIA FAMILIARITY"]

P9. 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

a) The CFIA looks out for the best interests of Canadians
b) The CFIA is effective in enforcing food safety regulations
c) Getting information about food, plant or animal safety from the CFIA is easy
d) CFIA regulations are not strict enough

Disagree completely	1
	2
	3
	4
	5
	6
Agree completely	7
Don't know / Prefer not to say	99

P10. CFIA has several enforcement actions that it can use when cases of non-compliance are found. One is an Administrative Monetary Penalty, also called an AMP. CFIA publishes a summary list of AMPs on its website.

Do you strongly support, somewhat support, somewhat oppose, or strongly oppose CFIA publishing names of companies that receive AMPs?

Strongly oppose	1
Somewhat oppose	2
Somewhat support	3
Strongly support	4
Don't know / Prefer not to say	99

Food fraud

FF1. For context, food fraud may occur when food is misrepresented.

The four main types of food fraud are:

- Substituting
- Adulterating or diluting
- Mislabelling
- Making false claims or misleading statements

Generally, how concerned are you with food fraud when you go grocery shopping?

Not at all concerned	1
	2
	3
	4
	5
	6
Very concerned	7
Don’t know / Prefer not to say	99

FF2. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose CFIA publishing names of companies that have been found to have committed food fraud?

Strongly oppose	1
Somewhat oppose	2
Somewhat support	3
Strongly support	4
Don’t know / Prefer not to say	99

FF3. When it comes to safeguarding from misrepresented food being sold in Canada, how well do you believe the Canadian Food Inspection Agency is doing?

Not doing well	1
	2
	3
	4
	5
	6
Doing well	7
Don’t know / Prefer not to say	99

FF4. How much do you trust the Canadian Food Inspection Agency (CFIA) to inspect food product labels for ingredients to which people may be allergic or have a sensitivity?

Do not trust at all	1
	2
	3
	4
	5
	6
Trust completely	7
Don’t know / Prefer not to say	99

FF5. Rate your level of confidence that the CFIA will take enforcement action to protect consumers from food fraud?

Not at all confident	1
	2
	3
	4
	5
	6
Very confident	7
Don’t know / Prefer not to say	99

FF6. To the best of your knowledge have you experienced food fraud in the past year?

Yes	1
No	2
Don’t know / Prefer not to say	99

[ASK IF FF6 = 1]

FF7. Which product or products did you believe were misrepresented?

____

Don’t know / Prefer not to say	99

FF8. If I suspected food fraud, I would report it to the CFIA.

Definitely	1
Probably	2
Probably not	3
Definitely not	4
Don’t know / Prefer not to say	99

[ASK IF FF8 = 1 OR 2]

FF9. I would know how to report it.

Definitely	1
Probably	2
Probably not	3
Definitely not	4
Don’t know / Prefer not to say	99

FF10. How would you describe your level of trust in the following?

RANDOMIZE

a) That the fish you buy (for example, fresh salmon or frozen haddock) is accurately labelled for the type of fish.
b) That the multi-ingredient fish products you buy (for example, fish sticks) are accurately labelled for the type of fish.
c) That the fish you buy is safe to eat.

Do not trust at all	1
	2
	3
	4
	5
	6
Trust completely	7
I don't eat or buy fish	98
Don't know / Prefer not to say	99

FF11. To what extent do you trust the following types of locations when it comes to the fish they sell?

RANDOMIZE

a) Grocery stores
b) Restaurants
c) Fish mongers
d) Local markets

Do not trust at all	1
	2
	3
	4
	5
	6
Trust completely	7
I don't eat or buy fish	98
Don't know / Prefer not to say	99

FF12. Do you have any other opinions or comments that you would like to share about food safety or the CFIA?

____

Demographics

The last few questions are strictly for statistical purposes. All of your answers are completely confidential.

D1. What is the highest level of formal education that you have completed?

Some high school	1
High school diploma or equivalent	2
Registered apprenticeship or other trades certificate or diploma	3
College, CEGEP or other non-university certificate or diploma	4
University certificate or diploma below bachelor's level	5
Bachelor's degree	6
Graduate degree above bachelor's level	7
Prefer not to say	99

D2. What language do you speak most often at home?

English	1
French	2
Other **[SPECIFY]**	77
Prefer not to say	99

D3. Which of the following best describes your total household income last year, before taxes, from all sources for all household members?

Under $20,000	1
$20,000 to just under $40,000	2
$40,000 to just under $60,000	3
$60,000 to just under $80,000	4
$80,000 to just under $100,000	5
$100,000 to just under $150,000	6
$150,000 and above	7
Prefer not to say	99

D4. Are you an Indigenous person? An Indigenous person is a member of a First Nation, a Métis or an Inuk (Inuit) community. First Nations (North American Indians) include Status and Non-Status Indians.

Yes	1
No	2
Prefer not to say	99

[ASK IF D4 = 1]

D5. You indicated that you are an Indigenous person. If you wish to provide further details, please specify the group to which you belong:

First Nations (North American Indian)	1
Métis	2
Inuk (Inuit)	3
Other **[SPECIFY]**	77
Prefer not to say	99

[SKIP IF D4 = 1]

D6. 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.

Yes	1
No	2
Prefer not to say	99

[ASK IF D6 = 1]

D7. You indicated that you are a member of a visible minority group. If you wish to provide further details, please select which of the following groups describe your identity. **[SELECT ALL THAT APPLY]**

Black	1
Chinese	2
Filipino	3
Japanese	4
Korean	5
South Asian/East Indian (including: Indian from India; Bangladeshi; Pakistani; East Indian from Guyana, Trinidad, East Africa; etc.)	6
Southeast Asian (including: Burmese; Cambodian; Laotian; Thai; Vietnamese; etc.)	7
Non-White West Asian, North African or Arab (including: Egyptian; Libyan; Lebanese; Iranian; etc.)	8
Non-White Latin American (including: indigenous persons from Central and South America, etc.)	9
Person of mixed origin (with one parent in one of the visible minority groups)	10
Other visible minority group **[SPECIFY]**	77
Prefer not to answer	99

D8. Please provide the first three digits of your postal code: **[CODE AS RURAL AND URBAN – ALLOW 3 DIGITS FOR ENTRY]**

[INSERT FIRST THREE DIGITS OF POSTAL CODE. FORMAT A1A]	
Prefer not to answer	99