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Final Report Prepared for the Canadian Food Inspection Agency

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Canada 

CFIA POR for the Plant Business Line 2024 – Final report

Prepared for the Canadian Food Inspection Agency by Environics Research

Supplier name: Environics Research
March 2024

This public opinion research report presents the results of a quantitative and qualitative research study conducted by Environics Research on behalf of the Canadian Food Inspection Agency, comprising one online survey with n= 1026 Canadian residents, one telephone survey with n=300 plant-related businesses, and a series 20 of in-depth interviews conducted online or via telephone with potato farmers across Canada, with special attention to those located in PEI. The telephone survey with businesses was conducted from February 15th to February 29th, 2024; the online survey with Canadians was conducted from March 11th to March 20th, 2024, and the in-depth interviews took place from February 12th to March 26th, 2024.

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Executive summary

A. Background and objectives

As the federal entity responsible for safeguarding food, animals and plants, which enhances the health and well-being of Canada's people, environment and economy, the Canadian Food Inspection Agency (CFIA) has an objective to maximize the impact of its communications to Canadian businesses and the general public about issues, best practices and regulations related to plant health. Their high-level communications objectives for the plant health business line include:

1. **Increase awareness about why** it is important to foster plant health
2. **Drive action** through action-oriented communications
3. **Gain and maintain public trust** in the CFIA by highlighting its role in protecting Canada's resources
4. **Collaborate with Industry**

To monitor its progress in meeting these objectives, the CFIA contracted Environics Research to conduct research with the Canadian public and regulated plant businesses to understand perceptions of and trust in the CFIA; consumer and industry understanding of various plant health issues including invasive species; and the information needs and concerns of industry professionals and consumers about regulations, service delivery and operations.

Methodology

This research study consisted of three parts:

1. **Industry survey.** The industry survey consisted of a 10-minute telephone survey with 300 representatives of plant health businesses regulated by the CFIA. Relevant businesses were identified by NAICS codes, and the sample was sourced from business lists. The survey was in field from February 15 to 29, 2024.
2. **Qualitative IDIs with representatives of Canadian potato businesses.** The qualitative portion of this research project consisted of N=20 individual depth interviews conducted with potato growers and processors identified from publicly available lists. Interviews were conducted from February 12 to March 26, 2024.
3. **Public survey.** An online survey of Canadians was conducted with a representative sample of 1,026 Canadian adults (18+) drawn from an online panel. Quotas for age, gender and region and the final sample was weighted to ensure it reflects the distribution of the Canadian population. The survey was in field from March 11 to 20, 2024.

More detailed methodologies for each phase can be found in Appendix A, B and C of this report.

Statement of limitations: Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as measured in a quantitative survey. The results of the qualitative research should be viewed as indicative rather than projectable to the population.

Since online panel surveys are not random probability samples, no formal estimates of sampling error can be calculated for the public survey. Although not employing a random probability sample, online surveys can be used for general population surveys provided they are well designed and employ a large, well-maintained panel.

The telephone survey of businesses used a list of ~10,000 records of qualified businesses, drawn randomly from a total of ~17,000 available records. Companies from the list were dialled at random to reach the final sample of 300 completed surveys. The margin of error for this sample is +/- 6 percent, nineteen times out of twenty.

Contract value

The contract value was \$126,390.50 (including HST).

Key findings

Key findings – Business Survey

- **Regulated plant businesses are attentive to plant health issues.** Addressing plant health risks is a high priority for a majority (59%) of these businesses. They regularly seek information about plant health risks (65% at least monthly), most commonly through the Internet but also from trusted advisors in their network, such as colleagues, industry associations, agronomists, seed companies and pesticide suppliers, which is consistent with the learnings of the qualitative interviews.
- **Six in ten plant health businesses say their federal regulatory responsibilities are very or somewhat clear.** Seven in ten are comfortable (very or somewhat) managing the federal plant health regulatory responsibilities related to their business.
- **Plant health businesses have moderate familiarity with and trust in the CFIA.** A majority say they are familiar with the CFIA (56%), and those with at least minimal familiarity generally trust the CFIA to do what is right (62%).
- **About half of businesses recall receiving information from the CFIA in the past year, mostly by email.** The majority of this group are satisfied (17%) to neutral (36%) with the CFIA's communications overall and say the frequency is about right (65%). They are also generally positive about the clarity (77%) and helpfulness (81%) of the information, although in both cases, few are fully satisfied which leaves room for improvement.
- **Looking ahead, email is also by far the most preferred channel for future communications by the CFIA** (64%), with mail as a secondary channel (25%). Very few mention wanting to receive CFIA information by social media or the My CFIA portal (1% each). There is limited awareness (24%) and use (14%) of the My CFIA portal to date. There are varying levels of digital readiness among businesses, with just over four in ten who say they are ready for the CFIA to move to a digital or electronic reporting and inspection system, and another one in three in process of becoming ready.
- **Overall, larger businesses tend to express greater confidence than smaller companies with navigating the system.** Larger businesses (more than 50 employees) report a clearer understanding of their federal regulatory responsibilities and a greater degree of comfort managing those responsibilities, a greater familiarity with the CFIA, greater recall of receiving recent communications, greater use of My CFIA portal, and better digital readiness.

Key findings – Qualitative Interviews with Potato Businesses

The objective of the one-on-one interviews with potato growers was to more deeply explore the topics covered in the quantitative survey.

- **The interview results revealed differing perspectives of the potato wart situation based on proximity and impact. PEI producers who have been directly impacted by the border closure were very critical of the CFIA's initial potato wart decision** and the immediate, damaging and far-reaching consequences. As a result, PEI producers report a complete loss of trust in the CFIA's decision-making process. There was a sense that the CFIA has made efforts to improve its communications and relations with producers over the previous six months, but producers reserved judgement on whether such efforts are sufficient.
- **Producers outside PEI (in Alberta, Manitoba, Ontario and Quebec) have not paid the same degree of attention to potato wart** but the general consensus was that CFIA handled the situation appropriately, because potato wart has not spread beyond PEI. Producers acknowledged how challenging this situation is for PEI, in some cases drawing on their experience with the PCN virus that affected the Alberta industry in the late 2000s. Without this source of tension, producers outside PEI were reasonably satisfied with current relations with the CFIA. Concerns typically centered around the need to find efficiencies and increase automation to reduce bureaucracy and paperwork.
- **Potato growers in all provinces rely on a trusted network of sources for information about plant health**, which includes their provincial associations and experts such as agronomists, seed and pesticide suppliers and other producers. The CFIA website is not a go-to source for this information. However, producers in all provinces reported good relations with the inspectors and local CFIA contacts they felt they can go to with questions. They do, however, note some concerns about declining staff capacity within the CFIA.
- **Overall, producers outside PEI are not seeking major changes to how the CFIA communicates with them. Within PEI, producers' focus of change is with high-level decision-makers rather than regular communications.** Key ways in which producers feel the CFIA can encourage greater dialogue with growers include: being present; being authentic with requests for input and demonstrating how the input has been taken into consideration; and, more effectively championing Canadian industry with our trade partners.

Key findings – Survey of Canadians

- **Canadians are not engaged with plant health issues: they have limited awareness of major invasive species and few actively seek out plant health information.** Of a list of nine invasive species, Canadians are most aware of Japanese Beetle (29%), the Emerald Ash Borer (25%), and the Asian Longhorn Beetle (21%); 12 percent have heard of potato wart; fewer than one in ten have heard of any other invasive species, or of per and poly-fluoroalkyl substances (7%) or the One Health Approach (3%). Fewer than two in ten Canadians regularly seek out plant health information (i.e., more often than once a year), and just one in four consider themselves familiar with what causes or prevents the spread of invasive species.
- **There is low awareness of and familiarity with the CFIA.** Just five percent could name the CFIA as an organization dedicated to safeguarding and protecting plant health; 16 percent say they are familiar with the CFIA's activities; and 15 percent recall recent news about the CFIA.
- **Canadians express trust in the CFIA.** Two thirds of Canadians with at least some familiarity with the CFIA agree that it issues believable statements (65%) and that it looks out for the best interests of Canadians (64%). Those most familiar with the CFIA most frequently chose the words "scientific" (50%) and

“informative” (48%) to describe the CFIA (from a list provided). Thus, despite low public familiarity with its mandate, the CFIA appears to benefit from Canadians’ overall trust in government.

- **Of the many CFIA’s interest groups in plant health, farmers and gardeners emerge as a segment most informed about and engaged with plant health issues.** Farmers/gardeners¹ are among the most aware of several invasive species including the Japanese Beetle (47%), the Emerald Ash Borer (39%), the Asian Longhorn Beetle (33%) and have greater familiarity with the activities that can cause or prevent the spread of invasive species (38%). Campers/cottagers/hikers/outdoor enthusiasts and biology/ecology/nature enthusiasts are other groups who emerge as having relatively higher awareness of many plant health issues.
- **Potato wart is a primary issue of concern for the CFIA, but few Canadians (12%) are aware of it and this group has limited understanding that its management is a responsibility of the federal government (57%).**
- **To effectively reach Canadians, the CFIA should continue using a variety of online and traditional media channels.** Canadians who actively seek plant health information favour the Internet and Google search as their sources; only one in ten turn to social media – most commonly Facebook and Instagram. However, those who have heard recent news about the CFIA most commonly recall getting their information from traditional media like newspaper, TV and radio (57%), followed by websites (33%) and social media (26%) – again, with Facebook and Instagram best recalled.

Political neutrality statement and contact information

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

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¹ CFIA special interest groups were grouped by theme at the tabulation stage to allow sufficient sample size for analysis.

Introduction

Environics Research (Environics) is pleased to present this report to the Canadian Food Inspection Agency, with findings from two quantitative surveys and twenty qualitative in-depth interviews for their 2024 Public Opinion Research for the Plant Business Line.

Objectives

This research is intended to gain insights on the perceptions of and trust in the CFIA, awareness of the CFIA and of plant health issues, and information need and concerns of regulated plant businesses and the Canadian public. This research project contained three phases: a telephone survey with representatives of regulated Canadian plant-related businesses, an online survey of Canadians, and a series of 20 in-depth interviews with Canadian potato growers and processors. The objective of each phase of research were as follows:

Phase 1 – Base Industry Survey:

- Track trust and reputation of the CFIA among regulated plant businesses
- Gather data on other brand attributes that allow the Agency to manage and improve the CFIA brand specifically related to plant health and invasive species
- Analyze the variables influencing awareness of, trust and confidence in the CFIA
- Measure how stakeholders assess CFIA services
- Assess satisfaction with existing communication tools and tactics, as well as preferred methods of communication
- Collect demographics to allow for examination of results with a Gender Based Analysis+ (GBA+) lens
- Measure knowledge, understanding and behaviours related to preventing invasive species
- Measure perceived impact and effectiveness of CFIA response to invasive species, especially with regard to the management of Potato Wart in PEI

Phase 2 – Public survey:

- Track trust and reputation of the CFIA in relation to protecting plant health and limiting the spread of invasive species and protecting the environment
- Understand consumer familiarity with the CFIA and its mandate, particularly the Agency's role in protecting plant and human health (including biosolids)
- Gather data on other brand attributes that allows the CFIA to manage and develop the CFIA brand across the plant business line.
- Understand which audience segments are most open to CFIA messaging and their communication preferences with specific emphasis on the website and social media platforms
- Gain a better understanding of the elements that drive awareness and understanding of Don't move firewood and other concerns such as Japanese Beetle, Emerald Ash Borer, Spotted Lanternfly and Potato Wart
- Gain a better understanding of Canadians' travel intentions in the colder months and their knowledge of preventing invasive species and protecting Canadian plant health.

Phase 3 – Qualitative Research with Potato Businesses:

- Examine the effectiveness of key messaging and possible creative treatments
- Discuss satisfaction with existing communication tools and what tactics are preferred

- Discuss existing relationships, awareness, and trust in the CFIA as well as satisfaction with current CFIA services
- Discuss perceptions of the CFIA's initial and ongoing management of the issues of Potato Wart in PEI.

The information gathered during this research will inform policy and program development and assist the CFIA in creating appropriate compliance promotion resources and communication campaigns in the future.

About this report

This report begins with an executive summary outlining the key findings of the quantitative surveys and qualitative interviews, followed by a detailed analysis and breakdown of the results. Detailed descriptions of the survey and IDI methodologies are presented in Appendix A, B and C. The survey questionnaires are provided in Appendix D and F, and the IDI discussion guide is provided in Appendix E.

Overall results are presented in tables, and results are also analyzed by demographic sub-groups. In the survey of Canadians, these include mainly region, age, gender, region, and membership in special interest groups of the CFI based on hobbies and interests like farming, camping, travelling, and more (see Appendix C for a full list and breakdown of special interest groups). In the business survey, subgroup analysis includes region, age of the company, business type (identified through NAICS codes), and number of employees. In some instances, other sub-groups are included in the analysis to illuminate the findings where relevant.

Quantitative results are based on the entire sample unless otherwise noted. In this report, results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses.

Provided under a separate cover is a detailed set of “banner tables” presenting the results for all survey questions by subgroup segments. These tables are referenced by the survey question in the detailed analysis.

Notable differences between subgroups are noted based on Z-test results at 95% probability for comparing proportions, and based on two-tailed T-test results at 95% probability for comparing means. Comparisons are based on differences between exclusive sub-groups, and not on differences compared to the total or overlapping groups.

When interpreting results, note that because the online survey of Canadians used an opt-in panel, it is a non-probability survey and no margin of sampling error should be calculated. In the business telephone survey, a purchased list of businesses, identified through relevant NAICS codes, was used for the sample frame. The margin of error for a sample of 300 is +/- 6 percentage points, 19 times in 20. The margin of error is greater for results pertaining to regional or other subgroups of the total.

With regard to the qualitative research results, note that qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as measured in a quantitative survey. The results of the qualitative research should be viewed as indicative rather than projectable to the population of Canadian potato-related businesses as a whole.

I. Detailed findings – Survey of Plant Businesses

A. Issues Environment and Plant Health Risks

1. Business Priorities

Addressing plant health risks is a high priority for six in ten plant-related businesses, ahead of the priority placed on other business issues.

When businesses were asked to rate a list of topics as high, medium or low priority, “addressing plant health risks” was the most widely considered to be a high priority (59%), followed by “managing public trust and corporate reputation” (50%). All other items were identified as high priority by less than half of businesses.

Prioritizing Issues

Q3 <i>Thinking about the past two years, please tell me if each of the following has been a high, medium or low priority for your company.</i>	High priority	Medium priority	Low priority	Don't know/no answer
Addressing plant health risks such as pests and diseases	59%	25%	15%	1%
Managing public trust and corporate reputation	50%	30%	19%	2%
Addressing labour issues, such as hiring, capacity and retention	43%	28%	27%	2%
Managing regulatory issues	40%	38%	19%	4%
Implementing technology or innovation solutions	39%	43%	17%	2%
Driving business growth by seeking new clients and markets	39%	31%	28%	3%

Base: All respondents (n=300)

Medium-to-large businesses place a higher priority on most of these business issues than do smaller businesses. This is the case for plant health risks, which are a high priority for two-thirds (68%) of businesses with 10 or more employees, versus half (52%) with fewer than 10 employees. Labour issues are a particularly high priority of businesses with 50 employees or more (77%). The exception is managing public trust, which is a similarly high priority regardless of business size.

2. Clarity of federal regulatory responsibilities.

Six in ten businesses feel the federal regulatory responsibilities for regulated plant businesses are at least somewhat clear.

There is room for improvement in views about the clarity of federal regulatory responsibilities for regulated plant businesses. A small proportion (15%) say these responsibilities are very clear. The remainder say they are somewhat (46%) or not clear (37%).

Clarity of regulatory responsibilities

Q4. Overall, in your opinion, how clear are the federal regulatory responsibilities for regulated plant businesses?	Total (n=300)
Not at all clear	10%
Not very clear	27%
Somewhat clear	46%
Very clear	15%
Don't know/no answer	2%

Base: All respondents

Belief that regulatory responsibilities are not at all or not very clear is higher:

- In the Prairies (47%);
- Among the smallest businesses with 1 to 9 employees (42%), compared to 50+ employees (23%);
- Farming and forestry businesses (44%), compared to other plant businesses (21%).

3. Comfort with managing federal regulatory responsibilities.

Seven in ten businesses are either somewhat or very comfortable managing the federal plant health regulatory responsibilities related to their business.

There is also room for improvement in businesses' comfort level with their regulatory responsibilities. Nearly half (48%) of plant business representatives feel somewhat comfortable managing regulatory responsibilities. An additional two in ten (22%) are 'very comfortable'.

Comfort with managing regulatory responsibilities

Q5. How comfortable are you managing the federal plant health regulatory responsibilities related to your business?	Total (n=300)
Not at all comfortable	9%
Not very comfortable	17%
Somewhat comfortable	48%
Very comfortable	22%
Don't know/no answer	4%

Base: All respondents

Those who feel less comfortable (i.e., not very or not at all) managing regulatory responsibilities are more likely to be:

- From the Prairies (34%), compared to Ontario (16%) and Quebec (17%);
- The smallest businesses with 1 to 9 employees (37%);
- Over 30 years in business (32%);
- Farming and forestry businesses (33%).

4. Information seeking about plant health.

The majority of plant business representatives indicate they seek information about plant health at least once a month.

The frequency with which businesses seek out plant health information varies widely, but two-thirds (65%) do so at least monthly, and almost half (47%) do so on a weekly basis.

Frequency of plant health information seeking

Q6. Certain insects, invasive species and plant diseases pose a risk to the health of plants and crops in Canada. How often does your business look for information about plant health risks of any kind?	Total (n=300)
Daily	19%
Weekly	28%
Monthly	17%
Net: at least monthly	65%
Quarterly	16%
Annually	11%
Net: less than monthly but at least once a year	27%
Less often	6%
Don't know/no answer	2%

Base: All respondents

Likelihood to look for plant health information at least monthly is higher among:

- Businesses with 10-49 (73%) or 50+ employees (85%), compared to the smallest businesses (54% under 10 employees);
- Businesses that view addressing plant health risks as a high priority (77%).

5. Sources of information about plant health risks.

The most commonly used information sources about plant health risks are the internet/websites and through colleagues and professional networks.

Regardless of how often they look for information on plant health risks, businesses were asked what sources they use for this kind of information.

In total, just under one in 10 businesses directly named the CFIA when asked which sources they use to seek information about plant health risks. Notably, four in 10 cited 'other' sources, the most common being agronomists/agricultural consultants.

Primary sources used for information about plant health risks

Q7. What sources of information about plant health risks do you use or have you used in the past? (FIRST MENTIONS)	First mentions (n=300)	All mentions (n=300)
Internet/website	16%	28%
Colleagues/other seed producers/my network	15%	24%

Industry Association	8%	18%
Media (TV, newspaper, magazine)	8%	17%
Google search	6%	9%
Government of Canada	3%	8%
Canadian Food Inspection Agency/CFIA	2%	8%
Provincial Government	1%	7%
Social media	0%	2%
Other	31%	42%
Not sure	9%	9%

Base: All respondents

Other sources

Q7. What other sources of information about plant health risks do you use or have you used in the past?	Details of other sources mentioned (n=127)
Agronomist/ Agricultural consultant	37%
Seed companies, plant Brokers/Growers	13%
Universities and government studies	13%
Government websites (e.g. Agriculture Canada, Health Canada, OMAFRA-ON, MAPAC-QC)	11%
Association/Networking	10%
Publications, Books, magazines, catalogues	9%
Insecticides, pesticides and chemical companies/suppliers	9%
Réseau d'avertissements phytosanitaires (RAP-QC)	3%

Base: Q7="Other"

- Reported sources of information are largely similar by business type. A key exception is that older businesses (over 20 years) are more likely than younger businesses (under 20 years) to rely on colleagues or other seed producers, reflecting the network of relationships they have built over time.

B. CFIA

6. Familiarity with the CFIA

More than half of businesses are familiar with the activities of the CFIA, with larger businesses showing greater familiarity.

There is mixed familiarity with the CFIA's activities. A majority (56%) of businesses say they are familiar (a rating of 5, 6 or 7 out of 7), while one in ten (9%) are neutral (a rating of 4) and one-third (34%) are not familiar (a rating of 1, 2 or 3).

Larger businesses tend to be more familiar with the CFIA, ranging from three in four (75%) businesses with 50 or more employees to under half (47%) of small businesses with fewer than 10 employees.

Familiarity with the CFIA

Q8. How familiar would you say your company is with the activities of the Canadian Food Inspection Agency?	Total (n=300)
01 – Not at all familiar	13%
02	9%
03	12%
Net Not Familiar:	34%
04	9%
Net Neutral:	9%
05	20%
06	15%
07 – Very familiar	22%
Net Familiar:	56%
Don't know/no answer	1%

Base: All respondents

7. Trust in the CFIA

Six in ten plant business representatives report that their company trusts the CFIA to do what is right, with trust higher among those familiar with the CFIA

Among respondents with at least minimal familiarity with the CFIA (based on a rating of at least 2 on a scale from 1 to 7), the majority (62%) trusts that the agency is doing the right thing (rating of 5-7 out of 7). Another 16 percent are neutral, while two in ten say they do not trust the CFIA.

Trust in the CFIA is higher among businesses familiar with the agency (73%) than among those who are neutral (47%) or unfamiliar (38%).

Trust that the CFIA will do what is right

Q9. And how much does your company trust the Canadian Food Inspection Agency to do what is right?	Familiar with CFIA (Rated 2-7 out of 7) (n=257)
01 – Does not trust at all	3%
02	6%
03	10%
Net Does not trust:	20%
04	16%
Net Neutral:	16%
05	25%
06	20%
07 – Trusts completely	17%
Net trusts:	62%
Don't know/no answer	3%

Base: Q8 = Respondents with at least minimal familiarity with CFIA activities (rating at least two on a scale from 1-7, or unsure)

8. Channels of communication with the CFIA

Email is the most widely recalled source of CFIA information, well ahead of any other source. Almost half do not recall receiving information from the CFIA in the past year.

All business representatives surveyed (i.e., the total sample) were asked how their plant business has received information from the CFIA in the past year (unprompted, without providing answer categories). Nearly half did not recall receiving CFIA information in the past year. One-third (33%) report receiving information via email. Some also report receiving mailed documents (12%), having personal interactions with a CFIA representative (8%) or the CFIA website (4%). There is little reference to the My CFIA portal (1%) or CFIA social media (<1%).

Channels of communications received

Q10. How has your business received information from the CFIA in the past year?	Total (n=300)
Email	33%
Mailed documents/letters	12%
Personal interaction with CFIA representative	8%
Telephone calls	5%
CFIA website	4%
Through an industry association	1%
Notices in My CFIA portal	1%
CFIA social media	<1%
Other (specify)	10%
Did not receive any information from CFIA in past year/don't know	47%

Base: All respondents

Channels of communications received (Other)

Q10. How has your business received information from the CFIA in the past year? (Other, specify)	Details of other channels of communication mentioned (n=31)
Inspector	10%
Magazines	10%
Internal staff sharing information from head office/CFIA to farm	10%
In-person (role not specified)	10%
Agronomist	7%
Groups/Grower organizations	7%
Agricultural programs	7%

Base: Q10=Other

The proportion that does not recall getting any information from the CFIA is higher among:

- Small businesses with 1 to 9 employees (51%), compared with businesses of 10-49 employees (25%) or over 50 employees (12%).
- Businesses unfamiliar with the CFIA (67%), compared with those who are familiar (19%).

9. Satisfaction with CFIA communications

A majority of businesses that recall receiving CFIA communications in the past year give a neutral or positive satisfaction score (rating of 7 or higher out of 10).

Satisfaction rating. Plant business representatives who recall getting information from the CFIA in the past year were asked to indicate their level of satisfaction with the Agency's communications. There is mixed satisfaction, with 17 percent who are very satisfied (rating 9-10 out of 10) and another third (36%) who are neutral (rating 7-8); four in ten (40%) are not satisfied (rating 0-6).

Farming and forestry businesses are more likely (49%) than other plant businesses to be dissatisfied with CFIA communications (23%).

Satisfaction with CFIA communications

Q11. Overall how satisfied are you with the communication you have received from the CFIA?	Recall any CFIA information in the past year (n=187)
00 – Not at all satisfied	2%
01	2%
02	2%
03	2%
04	5%
05	16%
06	11%
NET: Not satisfied (0-6)	40%

07	20%
08	16%
NET: Neutral (7-8)	36%
09	3%
10 – Very satisfied	14%
NET: Very Satisfied (9-10)	17%
Don't know/no answer	7%

Base: Respondents who received CFIA communications through any channel in the past year

Areas for improvement. Businesses not fully satisfied with CFIA communications (rating of 0-8) were asked the reason why or how they think CFIA communications could be improved (unprompted, without providing answer categories). The most common source of dissatisfaction was a lack of communication or a desire for more contact with the CFIA (27%). Other areas for improvement include clearer (12%), faster/more efficient (11%) and more helpful (7%) information or service.

Areas for improvement with CFIA communications

Q12. Why do you give CFIA a rating of X out of 10 for its communications with you? That is, what could they do to improve their communications?	Lower satisfaction with communications (rated 0 to 8 out of 10) (n=141)
Lack of communication/would prefer more contact (general)	27%
Lack of clarity in communication/would prefer clearer information	12%
Slow response time/would prefer faster response time	11%
Poor customer service/would prefer more helpful staff	7%
Lack of online communication/would prefer more online information	7%
Lack of direct contact/would prefer more inspections	4%
Lack of efficiency/would prefer less red tape	2%
Other	4%
Don't know/no answer	36%

Base: Respondents not fully satisfied with CFIA communications (rated 0-8 out of 10)

10. Qualities of CFIA communications

Businesses that received CFIA communications in the past year are generally positive about the frequency, clarity and helpfulness of the information, but there is room for improvement in all three measures.

Businesses that recall receiving CFIA communications in the past year were asked about the frequency of those communications. Nearly two-thirds (65%) say the frequency is about right. Most of the remainder (29%) say they are not receiving communications often enough. Very few felt that CFIA communications were too frequent.

Interest in more frequent CFIA communications is more widespread in Quebec (48%) and among smaller businesses (37% with less than 10 employees and 30% with 10-49 employees).

Frequency of CFIA communications

Q13. Would you say the frequency with which you get communications from the CFIA is...?	Recall CFIA communication in the past year (n=187)
Too often	<1%
About right	65%
Not often enough	29%
Don't know/no answer	6%

Base: Respondents who received CFIA communications through any channel in the past year

Businesses who recall CFIA communications were also asked about the clarity and helpfulness of the information. Most (77%) agree that CFIA communications are clear and easy to understand, although only one in five (20%) strongly agree. There is a similar pattern in agreement that CFIA communications are helpful and easy to understand: a strong majority (81%) agree at least somewhat, but only one in four (26%) strongly agree.

Clarity and Helpfulness of CFIA Communications

Q14a. To what extent do you agree or disagree with the following statements about communications from CFIA?	Recall CFIA communication in the past year (n=187)	
	Clear and easy to understand	Helpful and give you the information you need to know
Strongly disagree	3%	2%
Somewhat disagree	12%	10%
Net: disagree	15%	12%
Somewhat agree	57%	56%
Strongly agree	20%	26%
Net: agree	77%	81%
Don't know/no answer	8%	7%

Base: Respondents who received CFIA communications through any channel in the past year

11. Preferred channels for CFIA communications

Email is by far the most preferred channel for future communications from the CFIA.

Plant business representatives were asked how they would most prefer that the CFIA get them information they need to know (unprompted, without providing answer categories). The most preferred way for the CFIA to share information is directly through email (64%). This is well ahead of letter mail as the next most preferred option (25%). All other options were mentioned by fewer than one in ten respondents.

Email is the top preference across all businesses, but this preference is higher among businesses with 10 or more employees (80%) than among smaller businesses (50% 1-9 employees), who in turn are more likely than others to prefer communication by mail (34%).

The top “other mentions” include text message, media and advertising (TV or radio) and through their provincial federation or association.

Preferred channels for CFIA communications

Q15. In the future, how would you most prefer that CFIA get you the information you need to know?	Total (n=300)
Email	64%
By mail	25%
Personal interaction with CFIA representative	6%
By telephone	5%
CFIA website	4%
Newsletter	4%
Through an industry association	3%
Social media	1%
Notices in My CFIA portal	1%
Other	10%
I don't want the CFIA to send me future communications	2%
Don't know	4%

Base: All respondents

12. My CFIA Portal

There is limited awareness and use of the My CFIA portal to date, and those who have used it give it mixed ratings.

Awareness and use. One in four (24%) plant business representatives have heard of the My CFIA portal, and 14 percent have used or registered for it.

Awareness and use of My CFIA portal

Q16. Have you heard of the My CFIA portal? Q17. Have you used or registered for the My CFIA portal?	Total (n=300)
Yes, aware	24%
Yes, used	14%
No, not used/not sure	10%
No, not aware	75%
Not sure	1%

Base: All respondents

Use of the My CFIA portal is higher among:

- Large businesses with more than 50 employees (19%) than smaller businesses with 1 to 9 employees (10%)
- Newer businesses (20% under 20 years) than older businesses (10% 30 years or more).

Satisfaction. Users of the My CFIA portal give mixed views of the platform. One quarter (26%) are very satisfied (ratings of 9-10 on a scale from 0 to 10). One third (33%) give neutral ratings (7-8), and nearly four in ten (36%) give ratings of 6 or lower.

Satisfaction with My CFIA portal

Q18. How would you rate your experience with the My CFIA portal?	Used/Registered with My CFIA portal (n=44)
00 – Not at all satisfied	1%
01	1%
02	8%
03	0%
04	2%
05	14%
06	11%
NET: Not satisfied	36%
07	7%
08	26%
NET: Neutral	33%
09	10%
10 – Very satisfied	17%
NET: Very Satisfied	26%
Don't know/no answer	4%

Base: Used or registered for My CFIA portal

13. Readiness for digitization

A plurality of just over four in ten say they are ready for the CFIA to move to a digital or electronic reporting and inspection system, but digital readiness increases with business size.

The CFIA is planning to digitize its reporting and inspection systems. There are varying levels of readiness among plant-related businesses, with four in ten (43%) saying they are ready now. Another one in three are in the process of becoming ready, meaning they either have a plan in place (12%) or are starting to use more digital services (21%). One in five (20%) are not at all ready for this change.

Readiness for digitization

Q19. CFIA is planning on moving from a paper-based reporting system to a digital or electronic preferred system of reporting and inspecting, also called digital by default online services. Thinking about the technology in use at your farm or business, which of the following describes your level of readiness for this change?	Total (n=300)
You are not at all ready	20%
You are starting to use more digital services	21%
You have a plan in place to meet requirements in the near future	12%

You are ready now	43%
Don't know/no answer	4%

Base: All respondents

- Digital readiness increases with business size. The proportion of businesses that are “ready now” increases from three in ten (32%) businesses with fewer than 10 employees, to half (49%) with 10-49 employees and almost two-thirds (65%) with 50 or more employees.

C. Potato Wart

Potato wart is a plant disease caused by a soil-borne fungus. It poses no risk to human or animal health, but it reduces potato crop yields and makes potatoes disfigured. Potato Wart has recently been discovered in PEI, and its management has been a primary issue of concern for the CFIA.

A small set of questions about potato wart were asked to potato growers reached for this survey. While efforts were made to maximize the sample for this subgroup (see methodology for details), a total of 25 surveys were completed. Because this is a small sample size, the results should be interpreted with caution and considered only as directional or qualitative in nature and not as representative of the entire potato grower industry. .

- One in four potato growers say they are very familiar with potato wart, and a further four in ten are somewhat familiar.
- Three-quarters of potato growers say they have read, seen or heard something about potato wart in the past year.
- Half of potato growers are concerned about potato wart, and the remaining half are not concerned.
- Two thirds say the federal government (rather than their provincial government) is primarily responsible for implementing measures to reduce the spread of potato wart.
- When informed that the CFIA has primary responsibility, three in ten potato growers say the CFIA's management of potato wart in PEI has been very effective and four in ten say the CFIA's response has improved since the initial discovery of potato wart in PEI.

II. Detailed Findings – Qualitative IDIs

The qualitative research was based on one-on-one in-depth interviews with potato growers, including nine in PEI and 11 in Alberta, Manitoba, Ontario, and Quebec.

A. The issues environment

Interviews began with a discussion of the issues environment and the top challenges facing growers. Common problems raised include: access to labour, the price of inputs and equipment, plant breeders rights and access to new varieties, rules and regulations, weather and marketing/business development challenges.

Within discussion of the issues environment, pests/diseases and trade challenges were consistently raised top-of-mind in PEI, but not in other provinces. For that reason, the interview flow was very different in PEI, with discussion immediately turning to potato wart. The tone of conversation was always courteous and professional, but PEI producers appeared both frustrated with and resigned to the potato wart situation. Outside PEI, the conversations were more wide-ranging, with potato wart only discussed once raised by the interviewer.

B. PEI and potato wart

PEI producers were very critical of the CFIA's initial potato wart order in November 2021. First, they argued the decision itself was wrong because they felt that it was not based on the scientific evidence nor reflected any actual change in affected areas. Second, they criticized how the decision was reached and the announcement made: that it deviated from the potato wart plan, and in their opinion was too hasty without consulting producers, who found out from the news media, and used imprecise and damaging language (e.g. "PEI...is a place infested with potato wart").

PEI producers contended that the consequences of the announcement felt immediate and far-reaching: their markets are gone. Moreover, they said that once the announcement was out, it could not be taken back and the damage was done – and possibly permanent, with the perception that US markets have no interest in letting back in PEI potatoes.

As a result, PEI producers reported having lost trust in the CFIA's decision-making process. They believe the CFIA plays an important role in protecting food safety and quality in Canada. However, they questioned how there are insufficient checks and balances in place to prevent what they felt was an error in decision-making, and no repercussions to the CFIA despite having jeopardized the livelihoods of family farms and the PEI potato industry as a whole. A few producers contrasted this with the USDA, which is perceived to work "for and with" US producers.

PEI producers attributed the initial decision and its consequences to a decline in agriculture knowledge among top CFIA decision-makers and a lack of willingness to listen to producers. Producers observed that CFIA senior management no longer has the same connections to (or background in) agriculture as was historically the case in the department. Moreover, they felt the knowledge that exists among local veteran CFIA inspectors is not being transferred upwards, and as a result, management is disconnected from the situation on the ground. PEI producers also believe the CFIA acted unilaterally and made no space for involvement from and dialogue with producers. While some noted that CFIA was in a challenging position and facing a lot of pressure, they didn't consider that sufficient reason to have deviated from their understanding of the potato wart plan/protocol.

There was a sense that the CFIA has made efforts to improve its communications and relations with producers over the previous six months. Producers noticed a change in tone, but reserved judgement on whether it's enough. They were also optimistic about the appointment of a new President with connections to PEI.

Ultimately, interview participants from PEI emphasized the need for the CFIA to rebuild trust among producers, and had less to offer about the mechanics of improving communications (i.e., how the CFIA shares information with them). Their recommendations reflected what they believe was missing in the current situation: follow the science and the agreed-upon protocol; develop stronger processes to transfer knowledge within the CFIA; and, develop a more collaborative relationship with producers. Producers think the latter is best achieved by having the CFIA more present in-person to build those relationships.

C. Outside PEI

Potato growers outside PEI do not appear to have paid the same degree of attention to potato wart. The general consensus is that the CFIA handled the potato wart situation appropriately: its mandate is to protect the potato industry, and so it must have been well handled because potato wart did not spread outside PEI. Producers outside PEI recognized that the situation has been challenging for PEI even if they themselves have not been directly affected. Alberta growers made a connection to their experience with the PCN (potato cyst nematode) virus that closed the Alberta border in 2007-2008.

Without a source of tension like potato wart in PEI, potato growers outside PEI were reasonably satisfied with current relations with the CFIA. They have regular interactions and generally good relations with inspectors and have no concerns about reaching out to their CFIA regional representatives when needed. Areas of discord with the CFIA tended to focus on improving efficiencies, increasing automation and reducing the extent of bureaucracy and (physical) paperwork. As in PEI, there are also concerns about a perceived lack of staff capacity within the CFIA, including the impact of losing experienced inspectors to retirement. A couple of growers also specifically raised concerns about the burden placed on farms to do their own audits since the CFIA has cut inspection budgets.

D. Communications and engagement – All Provinces

Potato growers in all provinces have developed a trusted network that they rely on for information about plant health. First and foremost this includes their provincial associations, who are seen to be a bridge between individual producers and government, and distribute relevant information to producers through newsletters, meetings and conferences. They also turn to colleagues and industry experts such as other producers, seed suppliers, pesticide companies and agronomists.

Producers said the CFIA website is not a top-of-mind or well-used source for plant health information. They use the website to access documentation, inspection protocols and other “official” information but it is not their go-to source for pests and diseases. There is an impression that the CFIA website is “like other government websites,” where information is hard to find, not well organized nor up to date. Not all producers recalled being on the CFIA email list (Listserv). There is almost no awareness of Risk Management Documents (RMDS) nor did anyone recall having received a “proposal or request for feedback” about potato wart.

There are no simple answers as to how to encourage greater dialogue between the CFIA and producers. Overall, producers were pleased that the CFIA is demonstrating interest in this outcome by asking the question. However, outside PEI, producers were not seeking major changes to how the CFIA communicates with them. Within PEI, the desired focus of change was not with local day-to-day contacts but with higher-level CFIA decision makers. Notably, the interviews themselves demonstrated the regional disparities that the CFIA must contend with, although only a few producers explicitly acknowledged that.

Ultimately, there were a few key themes producers raised in how the CFIA could build stronger connections with growers. First, producers recommended the CFIA “be present”, by showing up and building relationships – admittedly a challenge in a time of labour shortages and budget cuts. Second, producers want the CFIA to

ensure requests for input are authentic and not simply “box checking” exercises and that the feedback is integrated. Finally, producers want to see the CFIA stand up for the Canadian industry, now and in the future: there is an impression that Canada has been more strict and transparent, and the US not adequately so, in testing and reporting of invasive species.

E. Poster for agricultural workers

There were reservations about the idea of a poster produced by the CFIA designed to educate agricultural workers about potato wart. Mainly, producers felt that responsibility for potato wart and other pests and diseases rests with the owners (farmers) and that workers should not be contacting the CFIA on their own accord. Producers want the CFIA to keep farmers informed, and they in turn will inform their employees. Other concerns were that prominent signs could raise questions with their customers (are they being transparent) and that such signage would be more confusing than helpful due to language and literacy barriers facing workers.

II. Detailed findings – Survey of Canadians

A. Views about the CFIA

1. Recognized plant health organizations

Most Canadians cannot identify the organization in Canada dedicated to safeguarding and protecting plant health.

When asked to recall organizations in Canada dedicated to safeguarding and protecting plant health (unprompted, without providing response options), just five percent name the Canadian Food Inspection Agency. A wide range of other non-profit and government organizations are mentioned, but none by more than six percent of Canadians. Moreover, more than half are unable to hazard a guess.

Plant health organizations

Q5. When you think of organizations in Canada that are dedicated to safeguarding and protecting plant health, which organizations come to mind? (up to 3 mentions) (n=1,026)	First mention	Total mentions
Greenpeace	5%	6%
Agriculture Canada/Department of Agriculture	5%	6%
Environment and Climate Change Canada	4%	6%
CFIA/Canadian Food Inspection Agency	4%	5%
Nature Conservancy Canada	3%	4%
World Wildlife Fund	3%	3%
Parks Canada	3%	3%
Canadian Wildlife Federation	2%	2%
Ducks Unlimited	1%	2%
Other (<2% total mentions)	15%	22%
Nothing/DK/NA	55%	56%

Base: All respondents (n=1,026)

2. Familiarity with the Canadian Food Inspection Agency

Fewer than one in five Canadians say they are familiar with the activities of the CFIA.

Respondents were asked to rate their familiarity with the activities of the Canadian Food Inspection Agency on a scale from 1 to 7. The results further confirm low familiarity with CFIA. Just sixteen percent of Canadians say they are familiar with the CFIA's activities (rating of 5-7 out of 7) and another one in five (19%) are neutral (rating of 4), while two thirds (65%) are not familiar (rating of 3 or lower).

Members of any of the CFIA's identified special interest groups are more likely than others to be familiar with the CFIA (18% vs. 11%).

Familiarity with CFIA

Q6. How familiar would you say you are with the activities of the Canadian Food Inspection Agency (CFIA)?	Total (n=1,026)
NET: Not familiar	65%
01 – Not familiar at all	29%
02	18%
03	18%
NET: Neutral	19%
04	19%
NET: Familiar	16%
05	10%
06	4%
07	3%

Base: All respondents (n=1,026)

3. Recently heard about the CFIA

Fifteen percent of those familiar with the agency recall seeing, hearing or reading something recently about the CFIA.

Canadians at least minimally familiar with the CFIA (at least 2 on a scale from 1 to 7) were asked if they had seen, heard, or read anything about the CFIA recently. Very few (15%) recall hearing recent news about the CFIA.

Recently heard about the CFIA

Q7. Have you seen, heard or read anything recently about the Canadian Food Inspection Agency (CFIA)?	Some familiarity with CFIA (n=729)
Yes	15%
No	71%
Not sure	14%

Base: Some familiarity with the CFIA (Q6 rating of 2 or more) (n=737)

Recall of recent news about the CFIA is higher among:

- Members of any special interest group (16%) compared to others (8%)
- Those who are familiar with the CFIA (28%) vs. those who are less familiar (11%)

Source of recall. The small group who recall hearing something about the CFIA were asked where they had encountered it. The top source was traditional media like newspapers, television and radio (57%), followed by the internet (33%), and social media (26%).

Relatively few indicate that the CFIA website, social media or direct contact was their source for hearing about the CFIA (13%). Among this group who had heard about the CFIA through social media (n=29 respondents), the most widely recalled source was Facebook, followed by Instagram and YouTube.

Recently heard about CFIA - Source

Q8. Where have you seen, heard or read about the CFIA? (select all that apply)	Recently heard about CFIA (n=112)
Traditional media (newspapers, TV , radio)	57%
Internet (includes online news sites but not social media)	33%
Social media (not including CFIA social media)	26%
Word of mouth (friends, family, etc.)	20%
CFIA website, social media or direct contact	13%
Billboards or signs in public locations	7%
A digital assistant (for example, Alexa, Siri, Google Assistant)	5%
Not sure	1%

Base: Recently seen/heard/read something about the CFIA (n=112)

4. Experience with the CFIA

One quarter of Canadians who are at least minimally familiar with the CFIA report some form of contact with the Agency.

Overall, Canadians with at least some familiarity with the CFIA (at least 2 on a scale from 1 to 7) report limited interaction with the CFIA. The most common types of interaction are reading articles or watching videos from the CFIA (16%) and visiting the CFIA website (12%). Very few (3%) say they follow CFIA on social media.

Notably, those with any of these forms of contact reported higher familiarity with the CFIA (51%) than those who haven't had such contact (9%).

Experience with the CFIA

Q9. Do any of the following apply to you? (n=737)	Yes
I have read articles, or watched videos, from the CFIA	16%
I have visited the CFIA website	12%
I have had in-person interaction with a CFIA employee	5%
I have a friend or family member who works at the CFIA	4%
I follow the CFIA on a social media platform	3%
I have contacted the CFIA by email or through the website	3%
I have contacted the CFIA by phone	3%
None of the above	76%

Base: Some familiarity with the CFIA (Q6 rating of 2 or more) (n=737)

5. Perspectives of the CFIA

Two thirds of those at least minimally familiar with the CFIA agree that it issues believable statements as a science-based regulator and that it looks out for the best interests of Canadians.

Respondents with at least some minimal familiarity with the CFIA (at least 2 on scale from 1 to 7) were asked to rate the CFIA on a series of statements (from 1 to 7, where 7 is highest and 1 is lowest). Majorities agree that the CFIA is believable when it issues a statement (65%) and that it looks out for the best interests of Canadians (64%).

Fewer than half agree with the other statements, in large part because many don't feel sufficiently informed to provide an opinion.

Perspectives of the CFIA

Q10. How much do you agree or disagree with each of the following statements about the Canadian Food Inspection Agency (CFIA)? (scale of 1-7) (n=737)	NET: Agree (05-07)	Neutral (04)	NET: Disagree (01-03)	Not sure
As a science-based regulator, the CFIA is believable when it issues a statement	65%	13%	8%	14%
The CFIA looks out for the best interests of Canadians	64%	14%	8%	14%
CFIA enforcement activities are strong enough to encourage companies to comply with the regulations	45%	17%	15%	24%
All businesses are treated fairly by the CFIA	44%	13%	9%	33%
I understand what the CFIA does	43%	21%	24%	12%
Getting information about food, plant or animal safety from the CFIA is easy	35%	13%	12%	39%

Base: Some familiarity with the CFIA (Q6 rating of 2 or more) (n=737)

The following subgroup differences emerge when it comes to perspectives of the CFIA:

- Agreement that the CFIA looks out for the best interests of Canadians is higher among older Canadians (71% aged 55+) than those under 55 (57%).
- Agreement that getting information from CFIA is easy is higher among biology, ecology and nature enthusiasts (43%), foodies (41%) and farmers/gardeners (39%) than others.

Canadians who consider themselves familiar with the CFIA (gave a rating of 5-7 out of 7) were asked to select words (from a list provided) which they believe best describe the CFIA. Most commonly, respondents gravitate towards the words "scientific", "informative", and "trusted".

Words used to describe the CFIA

Q11. Of the words listed below, please select the ones that best describe the Canadian Food Inspection Agency. (select all that apply)	"Familiar" with CFIA (n=166)
Scientific	50%

Informative	48%
Trusted	42%
Efficient	30%
Dedicated	29%
Fair	28%
Transparent	24%
Responsive	24%
Consistent	22%
Service Oriented	18%
Caring	16%
Respectful	16%
Innovative	14%
Collaborative	14%
Global Leader	12%
Punitive	10%
None of the above	11%

Base: Familiar with the CFIA (Q6 rating of 5 to 7) (n=166)

6. Performance of the CFIA safeguarding plant health

There are mixed views about the CFIA's performance on safeguarding plant health.

When asked to rate how well they believe the CFIA is doing with safeguarding plant health (on a scale from 1 to 7), there is no consensus opinion. Almost four in ten believe CFIA is doing well (rating of 5-7 out of 7), and another four in ten give a neutral rating (4). One in five (22%) believe the CFIA is not doing well in safeguarding plant health (rating of 1-3).

Performance of the CFIA regarding plant health

Q12. When it comes to safeguarding plant health (regulating invasive insects, plants, and other plant pests), how well do you believe the Canadian Food Inspection Agency is doing? (scale of 1 to 7)	Total (n=1,026)
NET: Well (05-07)	38%
07 – Doing Well	5%
06	10%
05	24%
04 – Neutral	40%
NET: Not well (01-03)	22%
03	11%
02	5%

01 – Not doing well	6%
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Base: All respondents (n=1,026)

- Positive perceptions of the CFIA’s performance in safeguarding plant health are higher among men (42%), those familiar with the CFIA (68%), and those who have had contact with the CFIA (58%).

B. Plant Health

7. Awareness of specific plant health issues

Almost half of Canadians are aware of at least one plant health issue, but there is generally low awareness of any single pest or disease.

Canadians most frequently recall hearing about the Japanese Beetle (29%), the Emerald Ash Borer (25%), and the Asian Longhorn Beetle (21%). One in ten (12%) have heard about Potato Wart, while awareness of all other listed invasive species is below one in ten.

Awareness of specific plant health issues

Q13. Have you seen, read or heard about any of the following plant health related issues recently? (n=1,026)	Yes
Net: Recall any	45%
Japanese beetle	29%
Emerald ash borer	25%
Asian longhorn beetle	21%
Potato wart	12%
Box tree moth	7%
Spongy moth	6%
Spotted Lanternfly	5%
Oak wilt	4%
Hemlock woolly adelgid	3%

Base: All respondents (n=1,026)

Source of awareness. The subgroup of respondents who indicated that they have recently heard about at least one invasive species were asked where they had encountered it. Television is the most widely recalled source (34%), followed by social media (24%), and newspapers or online news (20%). By comparison, relatively few (8%) say they heard about the invasive species from a government website.

Of respondents who heard about plant health issues through social media, the most common source was Facebook.

Heard about plant health issues – source

Q14A. As best as you can recall, where did you see, read or hear about ____? (select all that apply)	Heard of at least one issue (n=462)
Television	34%

Social media	24%
Newspaper (including online news)	20%
Radio	16%
Government website	8%
Other - Talking to family/friends	3%
Other - Outdoor signs	3%
Other - At parks/conservation areas	1%
Other - Google	1%
Other - On the news/CBC news	1%
Other (<1% mentions)	5%
Not sure	13%

Base: Aware of at least one plant health issue (n=462)

Heard about plant issues - Social media source.

Q14B. Which social media channels had information about ____? (select all that apply)	Heard of an issue through social media (n=110)
Facebook	45%
Instagram	23%
YouTube	19%
X (formerly Twitter)	13%
Reddit	11%
TikTok	10%
Other social media	10%

Base: Heard about a plant health issue through social media (n=110)

The following subgroups are more likely to have heard of specific plant health issues:

- Awareness of the Japanese Beetle (47%), the Emerald Ash Borer (39%), and the Asian Longhorn Beetle (33%) is higher among farmers/gardeners than others.
- Awareness of the Emerald Ash Borer is higher in Ontario (31%) and Quebec (41%) than in other regions.
- Awareness of the Emerald Ash Borer (38%) and Potato Wart (26%) is higher among those in rural areas than among those in urban areas (25% and 11%, respectively).
- Awareness of Potato Wart is also higher in Atlantic Canada (36%).

8. Familiarity with plant protection activities

A minority of Canadians are familiar with activities that can affect plant health.

One in four Canadians consider themselves familiar with the activities that can affect plant health, although very few (2%) say they are very familiar. Most (76%) do not feel familiar with what causes or prevents invasive species spread.

Familiarity with activities affecting plant health

Q15. How familiar are you with the activities that can prevent or cause the spread of invasive species and affect plants?	Total Sample (n=1,026)
NET: Familiar	24%
Very familiar	2%
Somewhat familiar	22%
NET: Not familiar	76%
Not very familiar	43%
Not at all familiar	32%

Base: All respondents (n=1,026)

Familiarity with the activities that can affect plant health is more widespread among:

- Farmers/gardeners (38%) and biology/ecology/nature enthusiasts (35%)
- Those with a post-graduate education (33%)
- Men (27%) vs. women (21%)

Familiarity with these activities is lower in Quebec (12%).

9. Per and polyfluoroalkyl substances (PFAs)

Less than one in ten Canadians have heard about PFAS.

PFAS (commonly referred to as “forever chemicals”, are a group of over 4,700 human-made substances. These extremely persistent substances are used in many industrial sectors and are found in a wide range of products, including certain firefighting foams, food packaging, non-stick cookware, cosmetics, textiles, vehicles, and electronics. Without providing a description of PFAS, Canadians were asked about their awareness of them. Just seven percent Canadians have heard of per and polyfluoroalkyl substances, while eight in ten have not heard of them and one in ten are unsure.

Awareness of PFAs

Q16. Have you seen, heard or read anything recently about “per and polyfluoroalkyl” substances, also known as PFAS?	Total (n=1,026)
Yes	7%
No	82%

Not sure	11%
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Base: All respondents (n=1,026)

Within the small subgroup of respondents who have heard of them, a strong majority (83%) are at least somewhat concerned about the environmental risk posed by PFAS.

Concern about PFAs

Q17. How concerned are you about the environmental risk caused by PFAS?	Heard about PFAs (n=67)
NET: Concerned	83%
Very concerned	45%
Somewhat concerned	38%
NET: Not concerned	13%
Not very concerned	13%
Not at all concerned	0%
Not sure	4%

Base: Aware of PFAS (n=67)

10. One Health Approach

Just three percent of Canadians have recently heard about the One Health Approach.

The term “One Health” recognizes the interconnections between people, animals, plants and their shared environment. This multisectoral and multidisciplinary collaborative approach addresses shared health threats. One Health has been encouraged and modelled by international health agencies such as the World Health Organization (WHO), World Organisation for Animal Health (OIE) and the Food and Agriculture Organization of the United Nations (FAO). Without providing a description of the One Health Approach, Canadians were asked about their awareness of it. Few Canadians (3%) recall having heard, seen or read something recently about the One Health approach. Nine in ten are not aware, and 7% are unsure.

Awareness of the One Health Approach

Q18. Have you seen, heard or read anything recently about the One Health approach?	Total (n=1,026)
Yes	3%
No	90%
Not sure	7%

Base: All respondents (n=1,026)

11. Potato Wart

Half of Canadians who have heard of potato wart are familiar with it, but most are at least somewhat concerned about the economic impact of the disease.

Potato wart is a plant disease caused by a soil-borne fungus. It poses no risk to human or animal health, but it reduces potato crop yields and makes potatoes disfigured. Respondents aware of Potato Wart (12% of total sample, n=135) were given this brief description of the disease and then asked some further questions about their familiarity and concern about its impacts.

Half of those aware of Potato Wart are at least somewhat familiar with it (50%), although very few (8%) are very familiar.

Familiarity with Potato Wart

<i>Q19. How familiar are you with potato wart?</i>	Heard about Potato Wart (n=135)
NET: Familiar	50%
Very familiar	8%
Somewhat familiar	42%
NET: Not familiar	49%
Not very familiar	43%
Not at all familiar	6%
Not sure	1%

Base: Q13 = Aware of Potato wart (n=135)

When asked how concerned they are about the economic risk of Potato Wart, three quarters of those aware of the disease are at least somewhat concerned (76%), including one in four who are very concerned.

Concern about Potato Wart

<i>Q20. How concerned are you about the economic risk posed by potato wart?</i>	Heard about Potato Wart (n=135)
NET: Concerned	76%
Very concerned	25%
Somewhat concerned	51%
NET: Not concerned	21%
Not very concerned	20%
Not at all concerned	1%
Not sure	3%

Base: Q13 = Aware of potato wart (n=135)

When asked what level of government is responsible for implementing measures to reduce the spread of Potato Wart, almost six in ten (57%) of those aware of Potato Wart correctly identified the federal government. One in five (18%) believe provincial governments are responsible, and seven percent say it falls to municipal/local governments. nearly one in five (17%) are unsure.

Responsibility for managing potato wart

Q21. As far as you know, what level of government is responsible for implementing measures to reduce the spread of potato wart?	Heard about Potato Wart (n=135)
Federal government (Government of Canada)	57%
Provincial government	18%
Municipal/local government	7%
Not sure	17%

Base: Q13 = Aware of potato wart (n=135)

Finally, respondents aware of Potato Wart were asked how effectively the CFIA has managed the response to the discovery of Potato Wart in PEI. There are very mixed views, with one in ten who say the response has been very effective, almost four in ten who consider it somewhat effective, and 17 percent who say it has been ineffective; more than one third don't know enough to say.

Effectiveness of CFIA's management of potato wart

Heard about Potato Wart			
Q22. The CFIA has a primary responsibility in protecting Canada's agriculture crops from invasive species. In your view, how effectively has the CFIA managed the response to the recent discovery of potato wart in PEI?	Total (n=135)	Atlantic Canada² (N=38)	All other provinces (N=97)
NET: Effective	48%	57%	46%
Very effective	9%	20%	7%
Somewhat effective	38%	37%	39%
NET: Not effective	17%	31%	14%
Not very effective	13%	29%	9%
Not at all effective	4%	3%	4%
Not sure	36%	12%	42%

Base: Q13 = Aware of potato wart (n=135)

12. Japanese Beetle

Canadians aware of Japanese Beetle are not particularly familiar with it, but are concerned about the risk it poses to agricultural production and green spaces.

² Sample size for PEI is too small to report, so data for Atlantic Canada is presented.

Respondents aware of Japanese Beetle (29% of total sample, n=299) were provided with a brief description of this invasive species and asked some further questions about their familiarity with and concern about it.

Just under half of those aware of Japanese Beetle say they are at least somewhat familiar with it (46%), including 11 percent who are very familiar. Familiarity is higher among farmers/gardeners (61%) than others. There are no statistically significant differences by province.

Familiarity with Japanese Beetle

Q23. How familiar are you with the Japanese Beetle?	Heard about Japanese Beetle (n=299)
NET: Familiar	46%
Very familiar	11%
Somewhat familiar	35%
NET: Not familiar	53%
Not very familiar	42%
Not at all familiar	11%
Not sure	1%

Base: Q13 = Aware of Japanese beetle (n=299)

Most of those aware of Japanese Beetle are at least somewhat concerned about the risk it poses to green spaces and agricultural production (85%), including one-third (33%) who are very concerned.

Concern about Japanese Beetle

Q24. How concerned are you about the risk of damage to green spaces and agricultural production posed by Japanese Beetles?	Heard about Japanese Beetle (n=299)
NET: Concerned	85%
Very concerned	33%
Somewhat concerned	52%
NET: Not concerned	9%
Not very concerned	9%
Not at all concerned	1%
Not sure	6%

Base: Q13 = Aware of Japanese beetle (n=299)

Strong concern (i.e., very concerned) about Japanese Beetle is higher among:

- Canadians aged 35+ (39%) vs. those aged 18-34 (11%)
- Women (40%) vs. men (27%)

- Farmers/gardeners (46%)
- Rural residents (53%) vs. urban residents (31%)

13. Spotted Lanternfly

Canadians aware of Spotted Lanternfly are modestly familiar with it, and express concern about both its economic and environmental risks.

Respondents aware of Spotted Lanternfly (5% of total sample, n=43) were provided with a brief description of this invasive species and asked some further questions about their familiarity with and concern about it.

About half of respondents aware of Spotted Lanternfly say they are at least somewhat familiar with it (51%), including one in ten (9%) who are very familiar.

Familiarity with Spotted Lanternfly

Q25. How familiar are you with the Spotted Lanternfly?	Heard of Spotted Lanternfly (n=43)
NET: Familiar	51%
Very familiar	9%
Somewhat familiar	42%
NET: Not familiar	49%
Not very familiar	31%
Not at all familiar	18%
Not sure	0%

Base: Q13 = Aware of spotted lanternfly (n=43)

Within the small subgroup of Canadians aware of Spotted Lanternfly, there are roughly equal levels of concern about the environmental (41% very concerned) and economic (35%) risk it poses.

Concern about Spotted Lanternfly

Q26. How concerned are you about the following risks posed by the Spotted Lanternfly?	Economic risk	Environmental risk
NET: Concerned	82%	90%
Very concerned	35%	41%
Somewhat concerned	47%	50%
NET: Not concerned	15%	6%
Not very concerned	12%	6%
Not at all concerned	2%	0%
Not sure	3%	3%

Base: Q13 = Aware of spotted lanternfly (n=43)

14. Firewood use and risks

More than half of Canadians are concerned about the environmental risks associated with moving firewood, and four in ten report using firewood at least occasionally.

Close to four in ten (37%) respondents report that they use firewood at least occasionally; this is higher among farmers/gardeners (55%) and campers/cottagers/hikers/outdoor enthusiasts (55%). Of those who use firewood, two-thirds are aware that moving untreated firewood poses a risk of spreading invasive species.

Use of firewood

Q27. Do you use firewood for any reason (heating, camping, having a fire) at least occasionally?	Total (n=1,026)
Yes	37%
No	60%
Not sure	3%

Base: All respondents (n=1,026)

Awareness of firewood use risks

Q28. Were you aware that moving untreated firewood from a campground or cottage can spread invasive species?	Uses firewood at least occasionally (n=396)
Yes	65%
No	30%
Not sure	5%

Base: Uses firewood at least occasionally (n=396)

All respondents were asked about their level of concern about the environmental risk posed by moving firewood from areas that have pests. There are mixed levels of concern, with more than half (55%) who are concerned, including two in ten (19%) who are very concerned. Concern is notably higher among those who use firewood (67%), and especially those who were previously aware of the risks of moving firewood (75%).

Concern about risks of moving firewood

Q29. How concerned are you about the environmental risk posed by moving firewood from areas that have pests (such as the Emerald Ash Borer)?	Total (n=1,026)	Uses firewood at least occasionally (n=396)	Aware that moving firewood can spread invasive species (n=260)
NET: Concerned	55%	67%	75%
Very concerned	19%	25%	31%
Somewhat concerned	37%	42%	44%
NET: Not concerned	27%	25%	21%
Not very concerned	20%	19%	18%
Not at all concerned	7%	6%	3%
Not sure	18%	8%	4%

Base: All respondents (n=1,026)

- Concern (very or somewhat) about the risks of moving firewood is also higher among farmers/gardeners (75%) and biology/ecology/nature enthusiasts (68%).

15. Seeking Information

A minority of under two in ten Canadians regularly seeks out information about plant health.

Canadians rarely seek information about plant health. Two-thirds of Canadians report seeking plant health information once a year (10%) or less often (57%). Fewer than two in ten (18%) look for plant health information more often than once a year.

Frequency of information seeking

Q30. How often do you look for any kind of information about plant health?	Total (n=1,026)
Daily	<1%
Weekly	2%
Monthly	7%
Quarterly	9%
NET: More than once a year	18%
Annually	10%
Less than annually	57%
Not sure	15%

Base: All respondents (n=1,026)

The proportion seeking plant health information more than once a year is higher among:

- Those who identify as Indigenous (41%)
- Farmers/gardeners (34%) and Biology/ecology/nature enthusiasts (33%)

Notably, Canadians who more frequently seek out this information (i.e. more than once a year) are also more likely to be familiar with CFIA (37% rated 5-7 out of 7).

All respondents were also asked what source they use most often to find information about plant health. By far the most popular sources are the internet/websites (47%) or a Google search (47%). Others use traditional media (18%) or turn to their personal networks (17%). About one in ten (13%) select the Government of Canada, and another six percent report turning to the CFIA specifically for this type of information.

Plant health information seeking - Source

Q31. What source of information about plant health do you go to most often? (select all that apply)	Total (n=1,026)
Internet/website	47%
Google search	47%
Media (TV, newspaper, magazine)	18%
Friends/neighbours/my network	17%
Government of Canada	13%
Social media	10%
Provincial government	9%
Canadian Food Inspection Agency/CFIA	6%
Industry association	3%
Other, please specify	7%

Base: All respondents (n=1,026)

Just one in ten respondents say they most often use social media to seek plant health information. Of those who do, Facebook is their preferred source, followed by Instagram.

Social Media Source

Q31B. What social media channels do you go to most often for information about plant health?	Use social media for plant information (n=96)
Facebook	49%
Instagram	33%
X (formerly Twitter)	16%
Tik Tok	10%
YouTube	35%
Reddit	17%
Other social media	14%

Base: Use social media for plant information (n=96)

16. Reporting invasive species to the CFIA

Most Canadians are unaware of how to report an invasive species sighting to the CFIA.

One percent of respondents say they have reported an invasive species sighting to the CFIA, and another 15 percent say they know where to do this. Most Canadians (79%) say they do not know where to report an invasive species sighting.

Reporting invasive species

Q32. Have you ever reported an invasive species sighting to the CFIA?	Total n=1,026
Yes	1%
No, but I know where to do this	15%
No, and I don't know where to do this	79%
Not sure	5%

Base: All respondents (n=1,026)

Of the small group of respondents who have reported an invasive species sighting to the CFIA (n=15), most felt it was somewhat or very difficult.

Appendix A: Base Industry Survey Methodology

Environics Research conducted a telephone survey with 300 Canadian regulated plant businesses, drawn from a list of 9,797 businesses under relevant NAICS codes. Specifically, the survey was conducted with individuals at these companies who have responsibility for business strategy and/or operations. The final average survey length was 11.75 minutes, and the response rate from the survey was 8.04%.

1. Sample design and weighting

Environics conducted a 10-minute telephone survey from February 15th to 29th, 2024. The sampling method was designed to attain interviews with 300 companies based on predicted response rates.

The sample frame for this study was a list of 10,000 regulated plant businesses purchased from Dun & Bradstreet Canada. This list of 10,000 businesses was randomly selected from the entire list of records available (~17,000). After cleaning the purchased list of 10,000 to remove duplicates and defunct entries, the list contained 9,797 eligible records. Records from the cleaned list were dialed at random to reach the final sample of 300 businesses.

Eligible businesses were defined as companies operating in Canada, under a list of relevant codes in the North American Industry Classification system. A full list of NAICS codes included in this study is provided below. The margin of error for this sample is +/- 6 percent, nineteen times out of twenty.

NAICS List for survey of plant businesses

NAICS Code	Title
111110	Soybean Farming
111120	Oilseed (except Soybean) Farming
111130	Dry Pea and Bean Farming
111140	Wheat Farming
111150	Corn Farming
111160	Rice Farming
111199	All Other Grain Farming
111211	Potato Farming
111219	Other Vegetable (except Potato) and Melon Farming
111310	orange groves
111320	Citrus (except Orange) Groves
111331	Apple Orchards
111332	Grape Vineyards
111333	Strawberry Farming
111334	Berry (except Strawberry) Farming
111335	Tree Nut Farming
111336	Fruit and Tree Nut Combination Farming
111339	Other Non-Citrus Fruit Farming
111411	Mushroom Production
111419	Other Food Crops Grown Under Cover

111421	Nursery and Tree Production
111422	Floriculture Production
111910	Tobacco Farming
111920	Cotton Farming
111930	Sugarcane Farming
111940	Hay Farming
111991	Sugar Beet Farming
111993	Fruit and Vegetable Combination Farming
111992	Peanut Farming
111998	All Other Miscellaneous Crop Farming
113110	Timber Tract Operations
113210	Forest Nurseries and Gathering of Forest Products
115112	Soil Preparation Planting and Cultivating
115113	Crop Harvesting Primarily by Machine
115114	Postharvest Crop Activities (except Cotton Ginning)
115310	Support Activities for Forestry
311211	Flour Milling
311212	Rice Milling
311213	Malt Manufacturing
311221	Wet Corn Milling and Starch Manufacturing
311224	Soybean and Other Oilseed Processing
311225	Fats and Oils Refining and Blending
311230	Breakfast Cereal Manufacturing
325311	Nitrogenous Fertilizer Manufacturing
325312	Phosphatic Fertilizer Manufacturing
325314	Fertilizer (Mixing Only) Manufacturing
325315	Compost Manufacturing

Regional completions were monitored to ensure there was a sufficient sample distribution from across Canada. In order to gather as many responses from potato-related businesses as possible, a sample maximization approach was used whereby all the available business listed under the Potato Farming NAICS code were purchased as part of the sample frame. Within each business, a business owner or person responsible for strategy and/or operations who was best positioned to answer the questions was identified. This included those holding positions such as CEO, Owner/operator, President, Vice President, Director or Operations manager. If someone holding one of these leadership positions was unavailable, interviewers scheduled call-backs as necessary. The final sample was weighted by region using data for the relevant NAICS codes from the 2021 Census of Agriculture to ensure it is geographically representative of plant businesses across Canada.

The distribution of the final sample across regions and firmographics is as follows:

Distribution of plant business responses

Firmographic group	Unweighted sample size	Unweighted proportion	Weighted proportion
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Region			
Atlantic	31	10%	3%
ON	91	30%	25%
QC	64	21%	16%
Prairies/Territories	76	25%	48%
BC	38	13%	8%
Industry (per NAICS codes)			
Farming and Forestry	185	64%	62%
Potato Farming	25	8%	8%
All other plant businesses	90	28%	30%
Years in Business			
Less than 20 years	48	16%	15%
20-30 years	60	20%	20%
30+ years	188	63%	64%
Number of employees			
1 to 9	148	49%	51%
10 to 49	110	37%	34%
50+	37	12%	13%

2. Questionnaire design

Environics worked with the Canadian Food Inspection Agency to develop a questionnaire that ensured the research objectives were met and all questions were appropriately worded, and that they adhered to federal government standards for public opinion research. Upon approval from the CFIA, the questionnaire was translated into French. The final business questionnaire is included in Appendix D.

Elemental Data Collection Inc. programmed the questionnaire, then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the survey's basic logic.

3. Pre-test

Prior to the launch of the Base Industry Survey, Environics conducted an internal pre-test of both language versions of the surveys and changes were made based on feedback. This telephone survey was fielded through Elemental Data Collection, and following Environics' internal pre-test and approval, Elemental launched a pre-test of the survey in both official languages. For the pretest, Elemental contacted a limited number of eligible businesses and conducted a pre-test in each language. These preliminary surveys included standard Government of Canada pretest probing questions at the end, to ascertain the survey length and language was appropriate. The business survey pre-test took place on February 12th, 2024 and achieved 20 responses (10 English and 10 French). CFIA project team leaders were debriefed and provided with a copy of the pre-test results. Some small changes to question wording were made following the pre-test, in order to maximize question clarity and manage survey response times. Pre-test responses were included in the final survey results.

4. Fieldwork

The telephone survey with businesses was conducted from February 15th, 2024 to February 29th, 2024. The survey was conducted using a secure, fully featured Computer Assisted Telephone Interviewing (CATI) environment. The survey took approximately 11 minutes to complete. For this survey, sampling, questionnaire programming, completing the interviews and data cleaning were subcontracted to Elemental Data Collection Inc. (EDCI) of Ottawa, a Canadian-owned field house. EDCI interviewers offered each respondent the opportunity to respond in either English or French. Research was conducted in accordance with federal government POR requirements, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act, or PIPEDA). Respondents were informed of how to obtain a copy of the survey results through the website of Library and Archives Canada. The survey was also registered with the Canadian Research Insights Council's Research Verification System. All telephone survey responses were captured electronically by the interviewer and combined into an electronic data file that was coded and analyzed (including open ended responses).

5. Data coding and tabulation

Following data collection and prior to analysis, data analysts performed a data-cleaning and validation process in accordance with the highest industry standards. Open-ended question data was coded and Environics designed banner tables in consultation with the project authority. The data was weighted by region to reflect the distribution of plant businesses across Canada, using data from the 2021 Census of Agriculture. Data tables were submitted in CSV format, and verbatim comments were made available in an Excel document after careful review to ensure that responses did not compromise confidentiality.

6. Completion results

The completion results are presented in the following table.

Contact disposition

Total Numbers Attempted	6044
Out-of-scope - Invalid	931
Unresolved (U)	3463
<i>No answer/Answering machine</i>	3463
In-scope - Non-responding (IS)	1239
<i>Language barrier</i>	10
<i>Incapable of completing (ill/deceased)</i>	15
<i>Callback (Respondent not available)</i>	363
<i>Refusal</i>	828
<i>Termination</i>	23
In-scope - Responding units (R)	411
<i>Quota Full</i>	0
<i>Completed Interview</i>	300
<i>NQ - Business type (Q2)</i>	111
Response Rate	8.04
Incidence	72.99

Appendix B: Qualitative Methodology

1. Sample Design

Environics completed 20 individual in-depth interviews (IDIs) with representatives of regulated potato seed growers and producers from across Canada from February 12 to March 26, 2024. Special focus was given to potato businesses located in PEI. The objectives of this qualitative research were to examine the effectiveness of key messaging and possible creative treatments, discuss satisfaction with and preferences for communications with the CFIA, and to discuss satisfaction with current CFIA services, especially regarding the emergence and handling of potato wart in PEI. The full discussion guide can be found in Appendix E.

Recruitment was completed in collaboration with the CFIA project team, who worked alongside the Environics team to develop a list of potato-related businesses to be contacted.

A total of 17 English and three French interviews were completed. A breakdown of interview composition by region is presented in the table below.

IDI completions by region and business type

Region	
PEI	9
AB	5
Ontario	2
Quebec	3
MB	1

2. Recruiting

Interview participants were recruited from a list of regulated potato seed growers and producers provided by the CFIA. Prior to the beginning of recruitment, the CFIA sent a pre-notification email to a list of businesses who were to be contacted for the research. The email notified businesses that Environics would be contacting them in the coming days, explained the purpose of the study, discussed the importance of their participation, and reassured recipients that their interview responses would be confidential and they would not be mentioned by name in any reports or deliverables.

Following this initial notification by the CFIA, Environics sent out emails inviting potential participants to schedule interviews based on their availability. Participants had their choice of interview format (online or via telephone) and language preference. To thank participants for their time and contribution, an incentive of \$100 per participant was paid to those who completed an interview.

Market research industry and Government of Canada standards for qualitative research were followed. Where no relevant Government of Canada standards existed, researchers met or exceeded industry standards. Environics is a founding member of the Canadian Research Insights Council (CRIC) and registered the research with CRIC's Research Verification System.

3. Interviewing

In total, 20 interviews were conducted between February 12 and March 26, 2024. Interviews lasted between 30 to 45 minutes and were mostly conducted by phone.

At the outset of each interview, the facilitator confirmed the participant's consent to proceed and verified the participant's identity and qualification to participate.

Environics worked closely with the CFIA project team to develop a discussion guide that addressed the information requirements of the research. At the outset of each interview, the facilitator confirmed the participant's consent to proceed and verified the participant's identity and qualification to participate. Sessions were not recorded due to the sensitive nature of the conversations and to facilitate the comfort of participants. Environics' senior interviewers kept detailed notes from the discussions which were used in the development of this report

Appendix C: General Population Survey Methodology

EnviroNics Research conducted a 10-minute, online survey with n=1,026 Canadians over the age of 18 to explore their awareness and perceptions of the CFIA and plant health issues. The response rate from the survey was 11.05%.

4. Sample design and weighting

This survey was conducted with 1,026 Canadians aged 18 and over. The sample was drawn from the Sago panel (formerly AskingCanadians), which is a panel provider that is included in EnviroNics' Standing Offer proposal. As Sago is an opt-in panel, this was a non-probability survey and no margin of sampling error can be calculated. Although opt-in panels are not random probability samples, online surveys can be used for general population surveys provided they are well designed and employ a large, well-maintained panel. Respondents were informed about privacy and anonymity.

Since participation in an online survey is not mandatory or random, the sample for this study was pre-stratified and weighted based on gender, age cohort and region of residence using census 2021 data to ensure that the sample was representative of the target population.

The below table presents the weighted and unweighted completions for age, gender and regional groupings:

Distribution of online survey responses

Demographic group	Unweighted sample size	Unweighted proportion	Weighted proportion
Region			
Atlantic	105	10%	7%
Quebec	200	19%	23%
Ontario	303	30%	39%
Man/Sask/NWT	122	12%	7%
Alberta	140	14%	11%
B.C./Yukon	156	15%	14%
Age			
18-34	243	24%	25%
35-54	351	34%	34%
55+	432	42%	41%
Gender			

Female	519	51%	51%
Male	498	49%	49%

A question was also included to identify members of special groups of interest to the CFIA, though no quotas or targets were set for completions within these categories. To ensure adequate sample sizes for analysis, these special interest groups were grouped at the tabulation stage as indicated in the table below.

Special Interest Groups

Special Interest Group	Unweighted sample size	Unweighted proportion	Weighted Proportion
<i>NET: Any</i>	875	85%	85%
Foodie	346	34%	34%
Camper/Cottager/Hiker/Outdoor enthusiast	464	45%	45%
Farmer/Gardener	270	26%	26%
Animal lover/Owner	494	48%	47%
Travel enthusiast/snowbird	503	49%	49%
Biology/Ecology/Nature enthusiast	272	27%	26%

5. Questionnaire design

Environics worked with the CFIA to develop an online questionnaire of 10 minutes average duration. The questionnaire covered topics such as awareness of the CFIA and plant health issues, concern about plant health issues, and commonly used sources for accessing information about plant health issues. Environics had the approved questionnaire translated into French.

Environics' data analysts programmed the questionnaire, then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the surveys' basic logic. The data collection system handles sampling invitations, quotas and questionnaire logic (skip patterns, branching, and valid ranges).

6. Pre-test

The online survey was first pre-tested internally by the Environics and CFIA project teams. Once approved, the survey was 'soft launched' online. In accordance with government standards, the survey was pre-tested with a minimum of 10 respondents in each language. The soft-launch took place on March 8th- 9th, 2024 and final pre-test completion results included 46 English and 38 French responses. These preliminary surveys included standard Government of Canada pretest probing questions at the end, to ascertain the survey length and

language was appropriate. No changes were required as a result of the pre-test and pre-test results were included in the analysis.

7. *Fieldwork*

The general population survey was conducted from March 11, 2024 to March 20, 2024. The survey took approximately 10 minutes to complete. The surveys were conducted by Environics using a secure, fully featured web-based survey environment. Environics' data analysts programmed the questionnaires then performed thorough testing to ensure accuracy in set-up and data collection. The sample was sourced from a trusted panel provider, Sago. Environics assumed overall responsibility for all aspects of the survey fieldwork, including sampling and programming the questionnaire. All respondents were offered the opportunity to complete the survey in their official language of choice. All research work was conducted in accordance with federal government POR standards for quantitative research, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act, or PIPEDA). As part of the survey, respondents were informed of how to obtain a copy of the survey results through the website of Library and Archives Canada. Environics also registered the survey with CRIC's research verification system.

Survey respondents, who were drawn from a panel of individuals who have agreed to participate in online surveys, were rewarded for taking part in the survey per the panel's incentive program. The reward was structured to reflect the length of the survey and the nature of the sample.

Accessibility considerations for the online survey. There is a diverse scope of individuals who participate in research, and Environics has worked toward formatting surveys to enable a user-friendly experience for all participants. We set up our online surveys so screen readers can deliver a better experience to those with disabilities. We extensively test our online surveys using industry-standard techniques and screen readers. Environics ensures its online surveys meet Web Content Accessibility Guidelines.

8. *Data coding and tabulation*

Following data collection and prior to analysis, data analysts performed a data-cleaning and validation process, in accordance with the highest industry standards. Any open-ended question data was coded and Environics designed banner tables in consultation with the project authority. Environics has provided the CFIA with a fully labeled SPSS file and banner tables in CSV format for web accessibility purposes, under separate cover. The data was weighted based on available census data to ensure that the overall results are proportionate to the population with regard to age, region and gender.

9. *Completion results*

Completion results

The completion results are as follows:

12075 CFIA Plant Health Public and Business Trust Survey (ERG 12003)		N
Disposition		
Total invitations	(c)	40525
Total completes	(d)	1026
Qualified break-offs	(e)	334

Disqualified (f)	416
Not responded (g)	35712
Quota filled (h)	3037
Contact rate = (d+e+f+h)/c	11.88
Participation rate = (d+f+h)/c	11.05

Non-response bias analysis

The table below presents a profile of the final sample, compared to the actual population of Canada (2021 Census information). The final online sample overrepresents younger Canadians and those with higher levels of education. This is likely a reflection of methods used to recruit online panel participants, and differences in internet use and habits between different population sub-groups.

Sample profile

Profile	Unweighted online Sample* %	Canada (2021 Census) %
Gender (18+) **		
Male	49	49
Female	51	51
Age [§]		
18-34	24	17 [§]
35-54	34	35 [§]
55+	42	48 [§]
Education level [¶]		
High school diploma or less	16	33
Trades/college/post sec no degree	34	34
University degree	50	33

* Data are unweighted and percentage on those giving a response to each demographic question

** Excludes those who identified as a gender other than male or female (1%)

§ Statistics Canada comparison age data is of primary household maintainer, not general population

¶ Actual Census categories differ from those used in this survey and have been recalculated to correspond.

Statistics Canada figures for education are for Canadians aged 25 to 64 years.

Statement of limitations

Since online panel surveys are not a random probability samples, no formal estimates of sampling error can be calculated. Although not employing a random probability sample, online surveys can be used for general population surveys provided they are well designed and employ a large, well-maintained panel.

Appendix D: Plant Business Questionnaire

January 2024

Canadian Food Inspection Agency
2024 Public Opinion Research for the Plant Business Line
Awareness of CFIA and Plant Issues – Industry Telephone Survey
Questionnaire

Hello/Bonjour, my name is **[Interviewer's name]**. I'm calling on behalf of Environics, a public opinion research company. Would you prefer that I continue in English or French? Préférez-vous que je continue en français ou en anglais? We're conducting a survey with farms and companies in the business of plant production, plant processing or plant health across Canada, including forestry. The survey is being done on behalf of the Government of Canada.

May I speak to the person in your company responsible for business strategy and/or operations? Would this be you or someone else?

IF PERSON IS AVAILABLE, CONTINUE. REPEAT INTRODUCTION IF NEEDED.

IF NOT AVAILABLE, SCHEDULE CALL-BACK.

The survey takes about 10 minutes. Your participation is voluntary and your decision to participate or not will not affect any dealings you may have with the Government of Canada in any way. Your identity and individual answers will remain anonymous and be kept strictly confidential. Any information you provide will be administered in accordance with the Privacy Act and other applicable privacy laws.

May I continue?

Yes, now **[CONTINUE]**

No, call later. Specify date/time: Date: Time:

Refused **[THANK/DISCONTINUE]**

INTERVIEWER NOTES:

NOTE: [IF ASKED: This study has been registered with the Canadian Research Insights Council's Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website: www.canadianresearchinsightscouncil.ca. If you choose to verify the authenticity of this research you can reference project code 20240207-EL904.

NOTE: If a respondent requests to speak with a study leader at CFIA, please take his / her name and phone number and mention that Ric Hobbs from CFIA will contact them.

Issues environment & plant health risks

2. Is this business involved in [**CONFIRM AGAINST SAMPLE**]?

[DO NOT READ LIST, MULTIPLE RESPONSE]

- Oilseed and Grain Farming (1111)
- Potato Farming (111211) [**Ask questions related to potato wart**]
- Other Vegetable (except Potato) and Melon Farming (111219)
- Fruit and Tree Nut Farming (1113)
- Greenhouse, Nursery and Floriculture Production (1114)
- Other Crop Farming (tobacco, sugarcane, hay, peanut) (1119)
- Timber Tract Operations (1131)
- Forest Nurseries and Gathering of Forest Products (1132)
- Logging (1133)
- Support Activities for Crop Production (1151)
- Support Activities for Forestry (1153)
- Grain and Oilseed Milling (3112)
- Pesticide, Fertilizer and other Agricultural Chemical Manufacturing (3253)
- Grain and Field Bean Merchant Wholesalers (424510)
- Flower Nursery Stock and Florists' Supplies Merchant Wholesalers (424930)
- Nursery Garden Centre and Farm Supply Retailers (444240)
- Farm Product Warehousing and Storage (493130)
- Other, Specify [**INTERVIEWER TYPE IN**] _____
- 99-Don't know/no response

3. Thinking about the past two years, please tell me if each of the following has been a high, medium or low priority for your company.

RANDOMIZE

- a. Managing regulatory issues
- b. Managing public trust and corporate reputation
- c. Addressing labour issues, such as hiring, capacity and retention
- d. Driving business growth by seeking new clients and markets
- e. Implementing technology or innovation solutions
- f. Addressing plant health risks such as pests and diseases

01-Low priority

02-Medium priority

03-High priority

VOLUNTEERED

99-Don't know/No answer

4. Overall, in your opinion, how clear are the federal regulatory responsibilities for regulated plant businesses?

READ

- 01- Not at all clear
- 02- Not very clear
- 03- Somewhat clear
- 04- Very clear
- VOLUNTEERED
- 99-Don't know/Not answer

5. How comfortable are you managing the federal plant health regulatory responsibilities related to your business? **READ LIST**

- 01- Not at all comfortable
- 02- Not very comfortable
- 03- Somewhat comfortable
- 04- Very comfortable
- VOLUNTEERED
- 99-Don't know/No answer

6. Certain insects, invasive species and plant diseases pose a risk to the health of plants and crops in Canada. How often does your business look for information about plant health risks of any kind? **READ ONLY TO CLARIFY:**

CLARIFY:

- 01-Daily
- 02-Weekly
- 03-Monthly
- 04-Quarterly
- 05-Annually
- 06-Less often
- VOLUNTEERED
- 99-Don't know/No answer

7. What sources of information about plant health risks do you use or have you used in the past?

DO NOT READ; RECORD FIRST AND OTHER MENTIONS SEPARATELY

- 01 – Internet/website – PROBE FOR SPECIFICS
- 02 – Google search
- 03 – Social media (Twitter, Instagram, Facebook) – PROBE FOR SPECIFICS
- 04 – Media (TV, newspaper, magazine)
- 05 – Canadian Food Inspection Agency/CFIA
- 06 – Government of Canada
- 07 – Provincial government
- 08 – Industry association
- 09 – Colleagues/other seed producers/my network
- 98 – Other – PROBE FOR SPECIFICS
- 99 – Not sure (SINGLE MENTION)

CFIA

8. 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”.

(CFIA Tracking question)

01 – Not at all familiar **SKIP TO Q10**

02 –

03 –

04 –

05 –

06 –

07 – Very familiar

VOLUNTEERED

99 – Don’t know/no answer

9. **[IF Q8=02-07 OR 99]** And how much does your company trust the Canadian Food Inspection Agency to do what is right? Please use a number between 1 and 7, where 1 means “does not trust at all” and 7 means “trusts completely”. *(CFIA Tracking question)*

01 – Does not trust at all

02 –

03 –

04 –

05 –

06 –

07 – Trusts completely

VOLUNTEERED

99 – Don’t know/no answer

10. How has your business received information from the CFIA in the past year? **PROBE:** Anything else?

DO NOT READ LIST. RECORD ALL THAT APPLY.

01-Mailed documents/letters

02-Telephone calls

03-Email

04-Notices in My CFIA portal

05-Personal interaction with CFIA representative

06-CFIA website

07-CFIA social media

10-Through an industry association

11-Other (SPECIFY)

98-Did not receive any information from CFIA in past year **SKIP TO Q.15**

99-Don’t know

11. 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”.

00 – Not at all satisfied

01 –

02 –

03 –

04 –

05 –

06 –

07 –

08 –

09 – **SKIP TO Q13**

10 – Very satisfied **SKIP TO Q13**

VOLUNTEERED

99 – Don’t know/no answer **SKIP TO Q13**

12. **[IF Q11=00-08]** Why do you give CFIA a rating of **[Q10 number]** out of 10 for its communications with you? That is, what could they do to improve their communications? **RECORD VERBATIM**

13. Would you say the frequency with which you get communications from the CFIA is...? **READ LIST**

01 – Too often

02 – About right

03 – Not often enough

VOLUNTEERED

99 – Don’t know/no answer

14. To what extent do you agree or disagree with the following statements about communications from CFIA? **RANDOMIZE**

a. They are clear and easy to understand

b. They are helpful and give you the information you need to know

READ SCALE STARTING WITH STRONGLY DISAGREE

01 – Strongly disagree

02 – Somewhat disagree

03 – Somewhat agree

04 – Strongly agree

VOLUNTEERED

99 – Don’t know/no answer

15. **ASK ALL:** In the future, how would you most prefer that CFIA get you the information you need to know?

DO NOT READ LIST. RECORD ALL THAT APPLY.

- 01-By mail
- 02-Telephone
- 03-Email
- 04-Notices in My CFIA portal
- 05-Personal interaction with CFIA representative
- 06-CFIA website
- 07-Social media – PROBE FOR SPECIFICS ('Which social media channel?')
- 09-Newsletter
- 10-Through an industry association
- 11-Other (SPECIFY)
- 98-I don't want the CFIA to send me future communications
- 99-Don't know

16. Have you heard of the My CFIA portal? [READ ONLY TO CLARIFY] The portal is an electronic way to manage and track service requests online, including export certificates and permissions such as licences, permits and registrations.

- 01-Yes
- 02-No **SKIP TO Q19**
- 99-Not sure **SKIP TO Q19**

17. **[IF Q16=01]** Have you used or registered for the My CFIA portal?

- 01-Yes
- 02-No **SKIP TO Q19**
- 99-Not sure **SKIP TO Q19**

18. **[IF Q17=01]** How would you rate your experience with the My CFIA portal? Use a scale of 0 to 10 where 0 is not all satisfied and 10 is very satisfied.

- 00 – Not at all satisfied
- 01 –
- 02 –
- 03 –
- 04 –
- 05 –
- 06 –
- 07 –
- 08 –
- 09 –
- 10 – Very satisfied
- VOLUNTEERED
- 99 – Don't know/no answer

19. CFIA is planning on moving from a paper-based reporting system to a digital or electronic preferred system of reporting and inspecting, also called digital by default online services. Thinking about the technology in use at your farm or business, which of the following best describes your level of readiness for this change?

READ LIST

- 01-You are not at all ready
- 02-You are starting to use more digital services
- 03-You have a plan in place to meet requirements in the near future
- 04-You are ready now
- VOLUNTEERED
- 99 – Don't know/no answer

Potato wart**ASK OF POTATO GROWERS/PRODUCERS (Q2 code 111211) only**

20. The next few questions are about potato wart. How familiar are you with potato wart, what causes it and how to protect against it? Are you...? **READ**

- 01 – Not at all familiar
- 02 – Not very familiar
- 03 – Somewhat familiar
- 04 – Very familiar
- VOLUNTEERED
- 99 – Don't know/no answer

21. Have you read, seen or heard anything about potato wart in the last year?

- 01 – Yes
- 02 – No
- 99 – Don't know

IF Q20=01 (NOT AT ALL FAMILIAR) AND Q21=02 (NOT HEARD ANYTHING), SKIP TO FIRMOGRAPHICS.

22. How concerned are you about the risk posed to your business by potato wart? Are you...? **READ**

- 01 – Very concerned
- 02 – Somewhat concerned
- 03 – Not very concerned
- 04 – Not at all concerned
- VOLUNTEERED
- 99 – Don't know/no answer

23. As far as you know, what level of government is responsible for implementing measures to reduce the spread of potato wart?

DO NOT READ LIST; RECORD ONE ONLY.

- 01 – Federal government (Government of Canada)
- 02 – Provincial government
- 03 – Municipal/local government
- 99 – Don't know

24. The CFIA has a primary responsibility in protecting Canada's agriculture crops from invasive species. In your view, how effectively has the CFIA managed the response to the recent discovery of potato wart in PEI? Has the CFIA been...? **READ**

- 01 – Not at all effective
- 02 – Not very effective
- 03 – Somewhat effective
- 04 – Very effective
- VOLUNTEERED
- 99 – Don't know/no answer

25. Since the initial discovery of potato wart in PEI, do you think the CFIA's response has: **READ**

- 01-Improved significantly
- 02-Improved somewhat
- 03-Stayed the same
- 04-Gotten worse
- VOLUNTEERED
- 99 – Don't know/no answer

Firmographics

I have two last questions about your company for classification purposes.

26. Approximately how many years has your company been in business?

DO NOT READ LIST; RECORD ONE ONLY

- 01-Less than 5 years
- 02-5 years to less than 10 years
- 03-10 years to less than 20 years
- 04-20 years to less than 30 years
- 05-30+ years
- 99-Don't know/no response

27. Including yourself, approximately how many people are employed in your company, including seasonal employees?

DO NOT READ LIST EXCEPT TO CLARIFY

- 01-Sole proprietor/just me
- 02-2 to 9
- 03-10 to 49
- 04-50 to 99
- 05-100 to 499 employees
- 06-500 to 999 employees
- 07-1000 to 4999 employees
- 08-5000+ employees
- 99-Don't know/no response

This concludes the survey. On behalf of the Canadian Food Inspection Agency, thank you very much for your participation in this research.

Appendix E: IDI Discussion Guide

Environics Research Group

January 2024

Canadian Food Inspection Agency
 2024 Public Opinion Research for the Plant Business Line
Business Qualitative Interviews - Discussion Guide
Twenty (20) one-on-one interviews by phone (30-45 minutes)

Name & Title:

Organization:

Type:

____ Potato seed PEI (quota=5)

____ Potato seed NB, QC, ON, 2 from AB (quota=5)

____ Table stock/processor PEI (quota=5)

____ Table stock/processor NB, QC, ON, AB, MB (quota=5)

Province:

Date:

Interviewer:

Interview number:

Introduction

Hello, my name is _____ from Environics, and I am calling to conduct our scheduled interview.

As you know, we are conducting interviews with potato producers and processors on behalf of the Canadian Food Inspection Agency. We would like you to share your thoughts and experiences.

The interview will take 30-45 minutes to complete, depending on your responses.

Your responses will not be linked to your name or organization.

Do you have any questions before we begin?

Context/issues environment

28. Please tell me a bit about your business – nature of business, size, length of time in business, etc.

29. What are the top issues or challenges you see in your business/sector?

Probe if not mentioned: Any trade concerns? What about pests and diseases?

a. If not mentioned: probe for concern about potato wart (specifically)

30. Moderator note: if there is a heated or emotional response to mention of potato wart: “I understand this is an important issue so I am going to skip some questions and ask right away, **in your opinion** how is CFIA handling the risk and what you think they could do better?”

a. Can you think of some of the challenges CFIA has on this issue and its efforts to be fair in its decision-making? Is the situation improving? What has worked?

Information & communications

31. How familiar are you with the CFIA’s mandate? How would you describe it?

Moderator note if necessary: The Canadian Food Inspection Agency is dedicated to safeguarding food, animals and plants of Canada and that includes specifically being committed to helping contain, control and prevent the spread of potato wart disease, which is regulated under the *Plant Protection Act* and *Regulations*.

32. Thinking about regulated pests and other plant health issues, **where** do you get information on these topics? What about potato wart specifically?

Probe: What about websites? Which ones?

What about other forms: social media, the media in general, other people, word of mouth, posters or hand outs at local stores?

33. Are there certain organizations, associations or groups you go to for information (PEI Potato Board? Canadian Potato Council? Province of PEI? Canadian Federation of Independent Businesses/CFIB? Others?)

34. Do you consult CFIA materials or individuals? Which specifically? How often?

Have you been to the CFIA website, at all, or specifically for information on pests including potato wart? How often? Can you share your experience? Did you find what you are looking for?

Do you subscribe to a CFIA email list (often called Listservs)? If yes, what do you think about the emails from the Agency? Are they informative?

35. Of these sources of information, which do you trust the most? Probe group and channel.

Potato wart

36. Do you think your knowledge of potato wart has increased in the past few years and what would you attribute that to?

37. Thinking specifically about Potato wart, what do you think of about how CFIA **initially** handled this issue?

38. How good a job is CFIA doing **now** (recently) in communicating/sharing information with potato farmers/growers/processors like you? RECORD RATING: excellent, good, only fair, poor? Why do you say that?

PROBE: Is the information relevant to your business?

39. Which documents, digital or otherwise have you received from the CFIA? Probe if necessary, what about specifically in relation to potato wart?

- a. Have you ever heard the term Risk Management Documents (often referred to as RMDs)?
- b. Have you ever received a proposal or request for feedback from the CFIA about potato wart?
- c. Have you provided feedback to the CFIA? If yes, how did that process work?
- d. What if anything do you think the Agency needs to understand better about your situation?
- e. Ideally how would you like to receive and share information, questions with the CFIA about potato wart or other regulatory matters?

40. Are there any factors that would convince you or make it more likely you would participate in a discussion with the Agency about risk management issues?

41. Please tell me about any recent interactions you have had with the CFIA. Some facilities have a daily interaction with CFIA, does that apply to you or how often would you say you interact with the CFIA. Probe: What implications/impacts does it have for your business?

Looking ahead

We wanted to check-in on a few communication tools we are thinking about, specifically one aimed at agriculture workers to inform them about the risk of regulated pests.

42. Any thoughts on where or how to get messages on pests or diseases such as potato wart to agriculture workers?
43. One idea the Agency has is to develop a poster that has images of potato wart telling the reader to recognize the signs and to report suspected cases. There would be a website and a QR Code that you could scan for more information.

Probe:

- a. Overall thoughts on how effective this poster would be?
 - b. Any thoughts on showing multiple images, do you think potato wart is hard to identify?
 - c. Where is the best place to put these posters?
 - d. Any other thoughts?
44. Do you have any other recommendations for CFIA about how to promote and encourage compliance with plant related regulations and requirements among potato growers like you?
45. Is there anything else you would like to add? Anything you expected to be covered in this interview that was not?

On behalf of the CFIA, thank you very much for your time. A report summarizing the results of this research will be available in the coming months on the Library and Archives website.

Appendix F: General Population Questionnaire

Environics Research Group

February 2024

Canadian Food Inspection Agency 2024 Public Opinion Research for the Plant Business Line Awareness of CFIA and Plant Issues – Gen Pop Online Survey Questionnaire

WEB INTRODUCTION

Welcome and thank you for your interest in our questionnaire / Bienvenue et merci de l'intérêt que vous portez à ce questionnaire.

Please select your preferred language for completing the survey / SVP choisissez votre langue préférée pour remplir le sondage.

- 01- English / Anglais
- 02- Français / French

Welcome to this survey being conducted by Environics Research, an independent research company, on behalf of the Government of Canada. The objective of this research is to help the Government of Canada understand the perceptions that Canadians have regarding the safety and protection of plant health within Canada.

Please be assured that we are not selling or soliciting anything. The survey is voluntary, and your responses will be kept entirely confidential and anonymous and will be administered according to the requirements of the Privacy Act, the Access to Information Act, and any other pertinent legislation. The survey will take approximately 10 minutes of your time to complete.

This study has been registered with the Canadian Research Insights Council's Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website www.canadianresearchinsightscouncil.ca. If you choose to verify the authenticity of this research, you can reference project code **20240307-EN191**.

Thank you in advance for your participation.

SCREENING

1A. In what year were you born?

[DROP DOWN LIST 1900-2021] **IF 2006-2021, THANK AND TERMINATE**

99– Prefer not to answer

ASK Q1B ONLY IF Q1A=99:

1B. Would you be willing to indicate in which of the following age categories you belong?

- 01 – Younger than 18 years old – **THANK AND TERMINATE**
- 02 – 18 to 24
- 03 – 25 to 34
- 04 – 35 to 44
- 05 – 45 to 54
- 06 – 55 to 64
- 07 – 65 or older
- 99– Prefer not to answer – **THANK AND TERMINATE**

2. Which of the following best describes your gender identity?

[SHOW TEXT]: *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.*

SINGLE-SELECT

- 01 – Man
- 02 – Woman
- 03 – Non-binary gender (optional to specify) _____
- 99 – Prefer not to say

3. In which province or territory do you live?

DROP DOWN LIST – SELECT ONE ONLY

- 01 – British Columbia
- 02 – Alberta
- 03 – Saskatchewan
- 04 – Manitoba
- 05 – Ontario
- 06 – Quebec
- 07 – Newfoundland & Labrador
- 08 – Prince Edward Island
- 09 – Nova Scotia
- 10 – New Brunswick
- 11 – Northwest Territories
- 12 – Yukon
- 13 – Nunavut

4. Which of the following descriptions would you say describe you at least somewhat? Select all that apply.

MULTI-SELECT

- 01 – Foodie
- 02 – Camper
- 03 – Cottager
- 04 – Hobby farmer
- 05 – Gardener
- 06 – Nature enthusiast
- 07 – Hiker
- 08 – Outdoor enthusiast
- 09 – Farmer
- 10 – Pet owner
- 11 – Small bird flock owner
- 12 – Animal lover
- 13 – Travel enthusiast
- 14 – Travel south for the winter “snow bird”
- 15 – Biology or ecology hobbyist or enthusiast
- 98 – None of the above

Main survey

A. Familiarity with the CFIA

5. When you think of organizations in Canada that are dedicated to safeguarding and protecting **plant health**, which organizations come to mind? Please type one organization per box for up to 3 organizations.

OPEN END → PROVIDE 3 BOXES AND RECORD THE ORDER THAT THE BRANDS ARE MENTIONED
[ALLOW RESPONDENTS TO MOVE FORWARD IF FILLED ONE BOX OR MORE]

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

- 01 – Not familiar at all **[SKIP TO PLANT HEALTH SECTION Q12]**
- 02
- 03
- 04
- 05
- 06
- 07 – Very familiar

7. Have you seen, heard or read anything recently about the Canadian Food Inspection Agency (CFIA)?

- 01 – Yes
- 02 – No **[SKIP TO Q9]**
- 03 – Not sure **[SKIP TO Q9]**

8. **[ASK IF Q7=YES]** Where have you seen, heard or read about the CFIA? Select all that apply.

MULTI-SELECT

- 01 – Word of mouth (friends, family, etc.)
- 02 – Billboards or signs in public locations
- 03 – Social media (not including CFIA social media) **[IF SELECTED, ASK Q8B]**
- 04 – A digital assistant (for example, Alexa, Siri, Google Assistant)
- 05 – Traditional media (newspapers, TV, radio)
- 06 – Internet (includes online news sites but not social media)
- 07 – CFIA website, social media or direct contact

- 99 – Not sure **[SINGLE PUNCH]**

8B. **[ASK IF Q8=03]** On which social media channels did you see, read, or hear about the CFIA (not including CFIA social media)? Select all that apply.

MULTI-SELECT

- 01 – Facebook
- 02 – Instagram
- 03 – X (formerly Twitter)
- 04 – Tik Tok
- 05 – YouTube
- 06 – Reddit

- a) – Other social media

- 99 – Not sure **[SINGLE PUNCH]**

9. Do any of the following apply to you?

GRID – RANDOMIZE

- 01 – Yes
- 99 – No
- 99 – Not sure

- a) I follow the CFIA on a social media platform
- b) I have visited the CFIA website
- c) I have contacted the CFIA by phone
- d) I have contacted the CFIA by email or through the website
- e) I have read articles, or watched videos, from the CFIA
- f) I have had in-person interaction with a CFIA employee
- g) I have a friend or family member who works at the CFIA

10. How much do you agree or disagree with each of the following statements about the Canadian Food Inspection Agency (CFIA)?

RANDOMIZE LIST, CAROUSEL

- 01 – Disagree completely
- 02
- 03
- 04
- 05
- 06
- 07 – Agree completely

- 99 – Not sure

- a) The CFIA looks out for the best interests of Canadians.
- b) All businesses are treated fairly by the CFIA.
- c) I understand what the CFIA does.
- d) Getting information about food, plant or animal safety from the CFIA is easy.
- e) As a science-based regulator, the CFIA is believable when it issues a statement.
- f) CFIA enforcement activities are strong enough to encourage companies to comply with the regulations .

ASK Q11 ONLY IF Q6= 05, 06, or 07:

11. Of the words listed below, please select the ones that best describe the Canadian Food Inspection Agency (CFIA).

Please select all that apply:

PRESENT TILE GRID, MULTI-SELECT

- 01 – Efficient
- 02 – Transparent
- 03 – Innovative
- 04 – Informative
- 05 – Scientific
- 06 – Fair
- 07 – Dedicated
- 08 – Consistent
- 09 – Trusted
- 10 – Responsive
- 11 – Respectful
- 12 – Collaborative
- 13 – Punitive
- 14 – Caring
- 15 – Global leader
- 16 – Service oriented
- 99 – None of the above

B. Plant Health Questions

Performance of CFIA safeguarding plant health

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

- 01 – Not doing well
- 02
- 03
- 04
- 05
- 06
- 07 – Doing well

13. Have you seen, read or heard about any of the following plant health related issues recently?

RANDOMIZE, GRID

- 01 – Yes
- 02 – No
- 99 – Not sure

- a) Potato wart **[IF Q13A=01, ASK Q19-22]**
- b) Japanese beetle **[IF Q13B = 01, ASK Q23-24]**
- c) Spotted lanternfly **[IF Q13C = 01, ASK Q25-26]**
- d) Emerald ash borer
- e) Spongy moth
- f) Box tree moth
- g) Oak wilt
- h) Hemlock woolly adelgid
- i) Asian longhorn beetle

14. As best as you can recall, where did you see, read, or hear about [INSERT Q13 – IF MULTIPLE, SELECT ONE RANDOMLY]? Select all that apply.

MULTI-SELECT

- 01 – Television
- 02 – Radio
- 03 – Social media **[IF SELECTED, ASK Q13B]**
- 04 – Government website
- 05 – Other website (please specify up to 3 websites) ____ **[PRESENT 3 BOXES, RESPONDENTS MUST FILL AT LEAST ONE BOX]**
- 06 – Newspaper (including online news)
- 98 – Other, please specify ____ **[SINGLE OPEN END BOX]**
- 99 – Not sure

ASK ONLY IF Q14=03:

14B. Which social media channels had information about [INSERT Q13 – IF MULTIPLE, SELECT ONE RANDOMLY]? Select all that apply.

MULTI-SELECT

- 01 – Facebook
- 02 – Instagram
- 03 – X (formerly Twitter)
- 04 – Tik Tok
- 05 – YouTube
- 06 – Reddit
- 07 – Other social media

15. How familiar are you with the activities that can prevent or cause the spread of invasive species that affect plants?

- 01 – Very familiar
- 02 – Somewhat familiar
- 03 – Not very familiar
- 04 – Not at all familiar

16. Have you seen, heard or read anything recently about “per and polyfluoroalkyl” substances, also known as PFAs?

- 01 – Yes
- 02 – No **SKIP TO Q.18**
- 99 – Not sure **SKIP TO Q.18**

17. **[ASK ONLY IF Q16=01]** How concerned are you about the environmental risk caused by PFAS?

- 01 – Very concerned
- 02 – Somewhat concerned
- 03 – Not very concerned
- 04 – Not at all concerned
- 99 – Not sure

18. Have you seen, heard or read anything recently about the One Health approach?

- 01 – Yes
- 02 – No
- 99 – Not sure

POTATO WART [ASK ONLY IF Q13A=01]

[SHOW TEXT] Potato Wart is a plant disease caused by a soil-borne fungus. It poses no risk to human or animal health, but it reduces potato crop yields and makes potatoes disfigured.

19. How familiar are you with potato wart?

- 01 – Not at all familiar
- 02 – Not very familiar
- 03 – Somewhat familiar
- 04 – Very familiar
- 99 – Not sure

20. How concerned are you about the economic risk posed by potato wart?

- 01 – Very concerned
- 02 – Somewhat concerned
- 03 – Not very concerned
- 04 – Not at all concerned
- 99 – Not sure

21. As far as you know, what level of government is responsible for implementing measures to reduce the spread of potato wart?

RANDOMIZE 01-03, SINGLE-SELECT

- 01 – Federal government (Government of Canada)
- 02 – Provincial government
- 03 – Municipal/local government
- 99 – Not sure

22. The CFIA has a primary responsibility in protecting Canada's agriculture crops from invasive species. In your view, how effectively has the CFIA managed the response to the recent discovery of potato wart in PEI?

- 01 – Not at all effective
- 02 – Not very effective
- 03 – Somewhat effective
- 04 – Very effective
- 99 – Not sure

JAPANESE BEETLE [ASK ONLY IF Q13B=01]

[SHOW TEXT] Japanese beetle larvae damage the roots of plants such as grass, shrubs and garden crops. Japanese beetle adults will feed on over 300 plant species, including landscape and ornamental plants; nursery stock; plants in gardens; and agricultural crops.

23. How familiar are you with the Japanese Beetle?

- 01 – Not at all familiar
- 02 – Not very familiar
- 03 – Somewhat familiar
- 04 – Very familiar
- 99 – Not sure

24. How concerned are you about the risk of damage to green spaces and agricultural production posed by Japanese Beetles?

- 01 – Very concerned
- 02 – Somewhat concerned
- 03 – Not very concerned
- 04 – Not at all concerned
- 99 – Not sure

SPOTTED LANTERNFLY [ASK ONLY IF Q13C=01]

[SHOW TEXT] The Spotted Lanternfly can feed on more than 100 species of trees and plants. It is not known to be present in Canada, but poses a significant threat to the grape, tree fruit, wine and ornamental nursery industries.

25. How familiar are you with the spotted lanternfly?

- 01 – Not at all familiar
- 02 – Not very familiar
- 03 – Somewhat familiar
- 04 – Very familiar
- 99 – Not sure

26. How concerned are you about the following risks posed by the Spotted Lanternfly?

GRID – RANDOMIZE

- a. The economic risk
- b. The environmental risk

- 01 – Very concerned
- 02 – Somewhat concerned
- 03 – Not very concerned
- 04 – Not at all concerned
- 99 – Not sure

PLANT RISK QUESTIONS [ASK ALL]

27. Do you use firewood for any reason (heating, camping, having a fire) at least occasionally?

- 01 – Yes
- 02 – No **SKIP TO Q29**
- 99 – Not sure **SKIP TO Q29**

28. **[ASK IF Q27=01]** Were you aware that moving untreated firewood from a campground or cottage can spread invasive species?

- 01 – Yes
- 02 – No
- 99 – Not sure

29. **[ASK ALL]** How concerned are you about the environmental risk posed by moving firewood from areas that have pests (such as the Emerald Ash Borer)?

- 01 – Very concerned
- 02 – Somewhat concerned
- 03 – Not very concerned
- 04 – Not at all concerned
- 99 – Not sure

SEEKING INFORMATION [ASK ALL]

30. How often do you look for any kind of information about plant health?

- 01 – Daily
- 02 – Weekly
- 03 – Monthly
- 04 – Quarterly
- 05 – Annually
- 06 – Less often
- 99 – Not sure

31. What source of information about plant health do you go to most often? Select all that apply.

MULTI-SELECT

- 01 – Internet/website
- 02 – Google search
- 03 – Social Media **[ASK Q31B]**
- 04 – Media (TV, newspaper, magazine)
- 05 – Canadian Food Inspection Agency/CFIA
- 06 – Government of Canada
- 07 – Provincial government
- 08 – Industry association
- 09 – Friends/neighbours/my network
- 98 – Other, please specify _____

31B. **[ASK ONLY IF Q31=03]** What social media channels do you go to most often for information about plant health?

- 01 – Facebook
- 02 – Instagram
- 03 – X (formerly Twitter)
- 04 – Tik Tok
- 05 – YouTube
- 06 – Reddit
- 07 – Other social media

32. Have you ever reported an invasive species sighting to the CFIA?

- 01 – Yes
- 02 – No, but I know where to do this **SKIP TO Q34**
- 03 – No, and I don't know where to do this **SKIP TO Q34**
- 99 – Not sure **SKIP TO Q34**

33. **[ASK IF Q32=01]** How was the overall experience of reporting an invasive species sighting to the CFIA?

- 01 – Very difficult
- 02 – Somewhat difficult
- 03 – Somewhat easy
- 04 – Very easy

DEMOGRAPHICS

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

SINGLE SELECT

- 01 – Less than a high school diploma or equivalent
- 02 – High school diploma or equivalent
- 03 – Registered apprenticeship or other trades certificate or diploma
- 04 – College, CEGEP or other non-university certificate or diploma
- 05 – University certificate or diploma below bachelor's level
- 06 – Bachelor's degree
- 07 – Graduate degree above bachelor's level
- 99 – Prefer not to answer

35. What language do you speak most often at home? Select all that apply.

MULTI-SELECT

- 01 – English
- 02 – French
- 03 – Other (specify) ____
- 04 – Prefer not to answer

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

- 01 – Under \$20,000
- 02 – \$20,000 to just under \$40,000
- 03 – \$40,000 to just under \$60,000
- 04 – \$60,000 to just under \$80,000
- 05 – \$80,000 to just under \$100,000
- 06 – \$100,000 to just under \$150,000
- 07 – \$150,000 and above
- 08 – Prefer not to answer

37. Are you an Indigenous person?

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

- 01 – Yes **[Ask Q38]**
- 02 – No **[Skip to Q39]**

- 99 - Prefer not to say **[Skip to Q39]**

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

- 01 – First Nations (North American Indian)
- 02 – Métis
- 03 – Inuk (Inuit)
- 98 – Other, please specify ____
- 99 – Prefer not to say

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

[SHOW TEXT]: *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.*

- 01 – Yes **[ASK Q40]**
- 02 – No **[SKIP TO Q41]**
- 99 – Prefer not to say

40. **[ASK ONLY IF Q39=01]** You indicated that you are a member of a visible minority group. If you wish to provide further details, please select the box(es) that apply to you (select all that apply).

MULTI-SELECT

- 01 – Black
- 02 – Chinese
- 03 – Filipino
- 04 – Japanese
- 05 – Korean
- 06 – South Asian/East Indian (including: Indian from India; Bangladeshi; Pakistani; East Indian from Guyana, Trinidad, East Africa; etc.)
- 07 – Southeast Asian (including: Burmese; Cambodian; Laotian; Thai; Vietnamese; etc.)
- 08 – Non-White West Asian, north African or Arab (including: Egyptian; Libyan; Lebanese; Iranian; etc.)
- 09 – Non-White Latin American (including: Indigenous persons from Central and South America, etc.)
- 10 – Person of mixed origin (with one parent in one of the visible minority groups)
- 11 – Other visible minority group, please specify ____
- 99 – Prefer not to say **[SINGLE PUNCH]**

41. Please provide the first three digits of your postal code: __ __ __ **[ALLOW 3 DIGITS FOR ENTRY]**

[CODE AS RURAL AND URBAN]

99 – Prefer not to answer

[SHOW TEXT]: Thank you for completing our survey.

ONLINE ENG/FRE END PAGE MESSAGES SHOWN TO RESPONDENTS

[SHOW TO ALL RESPONDENTS WHO DO NOT QUALIFY] We're sorry. You do not meet the qualifications for this survey. We sincerely thank you and appreciate your time, dedication, and continued participation in our online surveys.

[SHOW TO ALL RESPONDENTS WHO RECEIVE QUOTA FULL] Unfortunately the quota has been reached for your demographic and/or region. We sincerely thank you and appreciate your time, dedication, and continued participation in our online surveys.