



Canadian Food  
Inspection Agency

Agence canadienne  
d'inspection des aliments

# Public Opinion Research for the Animal Business Line: 2023-2024

## Research Report

## Executive Summary

Prepared for the Canadian Food Inspection Agency

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For more information on this report, please contact [information@inspection.gc.ca](mailto:information@inspection.gc.ca)

**Ce rapport est aussi disponible en français.**

Canada 

# Canadian Food Inspection Agency Public Opinion Research for the Animal Business Line: 2023 to 2024

Prepared for the Canadian Food Inspection Agency

Supplier name: Earnscliffe Strategy Group  
April 2024

This public opinion research report presents the results of a telephone survey and focus groups conducted by Earnscliffe Strategy Group on behalf of the Canadian Food Inspection Agency

The qualitative and quantitative data was conducted in March 2024.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique de l'Agence canadienne d'inspection des aliments pour le secteur d'activité des animaux 2023 à 2024

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## Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to the Canadian Food Inspection Agency (CFIA) summarizing the results of quantitative and qualitative research undertaken to understand awareness, and behaviours around regulatory requirements related to the health of animals.

The Canadian Food Inspection Agency (CFIA) is dedicated to safeguarding food, animals and plants, which enhances the health and well-being of Canada's people, environment and economy. The CFIA bases its activities on science, effective management of risk, commitment to service and efficiency, and collaboration with domestic and international organizations that share its objectives.

In support of the CFIA's [mandate](#) to mitigate risks to animal health, food safety, and the environment, the Communications and Public Affairs Branch (CPAB) informs Canadians about animal health programs, the *Health of Animals Act* and *Regulations*, as well as import and export requirements for animals and animal by-products.

Public Opinion Research (POR) was required to help the Agency in understanding awareness, and behaviours around regulatory requirements related to the health of animals among businesses but also consumers and the general public (such as, pet importation regulations).

The research will also be used to better understand small-scale pork producers and hobby farmers who may be operating without full knowledge of the CFIA, Agriculture and Agri-foods Canada, or industry association networks. The total contract value of the multi-phased project was \$174,717.21 including HST.

The objective of this research was to understand awareness and behaviours around regulatory requirements related to the health of animals among key audiences. The key audiences of the research were small-scale pork producers, animal health businesses (including veterinarians) and the general public (including pet owners and travellers).

To meet the research objective, Earnscliffe conducted a four-phased research project.

The first phase, a quantitative online survey, was conducted with 152 small-scale pork producers. Small pork producers were defined as anyone who owns at least one pig, either for consumption or as a pet, and does not belong to a provincial or national pork producer association or a hog or pig farmer association. The surveys were conducted in English and French, between March 1<sup>st</sup> and 11<sup>th</sup>, 2024. The average length of the interview was 10 minutes. As the survey was conducted using a non-probability online opt-in panel, no estimate of accuracy can be provided.

The second phase, utilizing qualitative methodologies, included online focus groups and in-depth interviews, conducted between March 5 and 18, 2024. Our specific approach was as follows:

- Three focus groups with Canadian consumers and members of the general public (including pet owners and/or international travellers);
- Seven focus groups with small-scale pork producers (who either own a pig as a pet or own a pig for consumption/farming purposes); and
- Six in-depth interviews with veterinarians (including those who specialize in large animal veterinary).

Three groups were conducted in French (one among consumers and two among small-scale pork producers) and seven groups were conducted in English. Each group was approximately 90 minutes in length.

The in-depth interviews were conducted by videoconference (Teams) or telephone, depending on the interviewees' preference. Two interviews were conducted in French and four were conducted in English. The interviews were approximately 30 to 40 minutes in length.

It is important to note that qualitative research is a form of scientific, social, policy, and public opinion research. Focus group and interview research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number. As such, results are directional only.

The third phase involved a nationally representative online panel survey of 1,007 Canadian adults between March 14 to 18, 2024, in both English and French. The survey took an average of 7 minutes to complete. Since a sample drawn from an Internet panel is non-probabilistic in nature, the margin of error cannot be calculated for this survey.

The fourth phase, an online survey, included 165 animal health businesses who are regulated by the CFIA. The businesses were invited to participate in the reach by CFIA using an email invitation and included an open link to the survey online. The survey was completed in English or French, according to respondents' preference, and averaged 14 minutes in length. Fieldwork was conducted from March 14 to 24, 2024.

## Key findings

### Findings for small pork producers

#### **Pig ownership and operational profile**

- Non-farmers are significantly more likely than farmers to have five or fewer pigs (89% versus 61%). One in five (22%) farmers keep between six and 10, and 17% keep more than 10.
- Two-thirds or more of farmers (66%) and non-farmers (72%) have kept pigs for the last five years or less. A plurality of non-farmers (45%) and a majority of farmers (59%) acquire new pigs directly from pig farmers.
- Over half of farmers (54%) and non-farmers (58%) would say that they have intermediate knowledge when it comes to caring for pigs.
- One in five farmers (22%) capture and keep wild pigs, compared to 9% of non-farmers. The vast majority of non-farmers say that they have not noticed wild pigs (90%) or evidence of them (88%) on their property.
- None of the focus group participants would describe themselves as pig farmers – including those who keep pets on a farm and have them for pork production. Pet owners aside, the consistent rationale was that to be a pig farmer meant that was your profession or a significant source of income or operation.
- In terms of where focus group participants' pigs are kept, there were a variety of habits described varying from providing them with a pen to a pet pig having its own bedroom in a home. In cases where other animals are kept on the same property, there was always intermingling of species, although in the case of sheep, separation was explicitly mentioned.
- Among focus group participants, there were also different approaches to feeding, with some participating in a "loop" program to get grocery waste for free and possibly supplementing with commercial pig feed. Those who keep pigs as pets described using commercial pig feed and table scraps.
- These pig owner focus group participants generally felt sufficiently knowledgeable to care for their few pigs, even while usually acknowledging there is always more to learn. Self-assessing, they describe their knowledge as beyond beginner, but not beyond intermediate.
- Focus group participants do not tend to seek out information on care. Many described relying on social media to ask questions of other pig-owners and tend to find that satisfies most questions or concerns they have about the health or care of a pig.

- Those focus group participants who have pigs as pets do get them vaccinated and seen by a veterinarian on a regular basis, but those who keep pigs on farms for pork would not involve a vet unless there was a health issue that seemed significant.

### **Awareness and perceptions of pig diseases**

- One-third of farmers (32%) and one-fifth of non-farmers (20%) say that they are very concerned that their pigs may encounter a virus or develop a disease.
- Among the 76% of farmers and 53% of non-farmers who are at least somewhat concerned about their pigs contracting a virus or developing a disease, no single source of infection stands out as more threatening than the others.
- Nearly half (45%) of farmers and one-fifth (20%) of non-farmers say that they have read, seen or heard something related to pig diseases in the last 12 months.
- Among the farmers and non-farmers who say that they have been exposed to recent content about pig diseases, two-thirds say that they saw, read or heard something about ASF when asked directly (66% and 64%, respectively).
- Seven in ten farmers (70%) and three-quarters of non-farmers (75%) believe that the level risk ASF poses to their pigs is low to moderate.
- Fewer than half of farmers and non-farmers feel it is likely that ASF will be found in Canada (44% and 31%, respectively); however, a majority of farmers and non-farmers do not know all the practices to prevent ASF from spreading to their pigs (54% and 62%, respectively).
- Non-farmers are more likely than farmers to believe that ASF spread in Canada would have only minor or no negative impact on their pig-related activities (71% versus 59%); few say it would be a very large negative impact (4% of farmers and 2% of non-farmers).
- Non-farmers are significantly more likely than farmers to say that they are not familiar with the role CFIA plays in preventing the spread of ASF in Canada (40% versus 19%). Conversely, more than one-fifth (22%) of farmers say that they are very familiar with the CFIA's role.
- Among focus group participants, there was little to no concern about pig diseases, nor awareness of specific things about which they should be concerned.
- Almost none of the focus group participants could name any diseases specifically affecting pigs. Some of the few that got mentioned were considered to be from unusual outbreaks that occurred long ago (e.g., hoof and mouth disease). A few did mention "swine flu" but the context suggest that it was as it appeared – they meant swine flu and not African swine fever.

- Prompted specifically on ASF, a few focus group participants did indicate having heard something, but it was never more than a vague recollection – typically of a news story – and there seemed to be conflation with swine flu.
- None of the focus group participants had taken any action specifically related to ASF and concern for it is very low with most of those who respond citing the fact they live in a low-risk environment, far from other pigs or any source of infection.

### **Biosecurity measures taken and barriers to taking measures**

- Four in ten (40%) farmers say that their pigs come in contact with visitors, or people who have contact with pigs on other properties; fewer (20%) have contact with pigs from other farms. While fewer non-farmers say that their pigs are in contact with people who have contact with other pigs (16%) or directly with pigs from other farms (9%), a majority say that their pigs have contact with visitors (51%).
- Over half of non-farmers (53%) would say they are not familiar with the national biosecurity standards compared to one-quarter of farmers (24%). One-quarter of farmers (26%) say that that they are very familiar with these standards, compared to only 5% of non-farmers.
- Despite soft awareness of the standards, strong majorities of farmers and non-farmers say that they do take measures to reduce the risk of disease among their pigs (73% and 62%, respectively).
- The main source of food for pigs among farmers and non-farmers is pig feed – either pre-mixed by the supplier (45% and 49%, respectively) or made on their farm (33% and 22%, respectively).
- While non-farmers are more likely than farmers to feed their pig human food scraps (24% versus 11%), a sizeable proportion of both farmers (38%) and non-farmers (49%) say that they are not aware of any risk to their pigs if they are fed food scraps.
- While some focus group participants take some limited measures to prevent the spread of disease to or among their pigs, this was mostly the pet owners whose pigs would get vaccinated annually and possibly seen by a veterinarian regularly or on an ad hoc basis. Those living in a homestead or farm environment tended not to typically have any biosecurity measures, nor have a veterinarian see their pig regularly.
- Very few focus group participants were familiar with the national biosecurity standards and those few were all owners of the larger operations included in this study. There was some assumption that the standards do not relate as well to their circumstances and are designed with only large operations in mind.

- None of the focus group participants described there as being any barrier that is preventing them from taking measures they would otherwise take to prevent their pigs from getting diseases.

### **Communication and information sources**

- Non-farmers are more likely than farmers to spend 5 hours or less per month researching caring for pigs (84% versus 67%), with veterinarians being the most common source of information for both farmers (41%) and non-farmers (40%).
- Over one-third (35%) of farmers and 16% of non-farmers have received information from the CFIA in the past year. Among those who have, 43% of farmers and 20% of non-farmers say that they are satisfied.
- Although sometimes reluctant to describe themselves as regularly seeking out information on caring for pigs, it was clear most focus group participants do in one way or another. However, the kind of information being sought often had to do with managing pigs and property, exchanging ideas/best practices, and information about pig mental health or capabilities.
- Few focus group participants had ever been to CFIA's website and none of those who had were describing having visited the site for information that would relate to their pig operations. Historically, information on CFIA's website was generally felt to be accurate but overly dense, lengthy and technical.
- The sources of information on pigs focus group participants rely upon are generally felt to be trustworthy, which is why they rely upon them, however, there was a tendency to describe needing to weigh or verify some information they come across – particularly when it is word of mouth or on a social media feed.
- Asked what constitutes an official source of information on caring for pigs, the most common answer among focus group participants was a veterinarian. Some did mention government and a small number mentioned a body that provides them with a licence or registration number.
- Almost none of the focus group participants felt that there are regulatory requirements that relate to them although some admitted there may be but they feel they are not realistic. The few larger operations were, by contrast, definitely aware and respectful of regulations that apply to their pigs.
- Asked how they would prefer to receive information from the Government of Canada if the government felt it important to get them information, by far the most common preference



among focus group participants is by email. A few did say they would like hard copy of information received in regular mail.

- Showing focus group participants online information provided by CFIA on ASF, the reaction to the “Close your gate on African swine fever” web page was generally positive. Most of the positive reaction was due to feeling the information was simple, clear, succinct which was offered by some as unusual for online information provided by the Government of Canada.
- Reactions among focus group participants to ASF videos on CFIA’s YouTube channel were mixed in the sense that people tended to see things they appreciated about each video while also seeing things they felt were problematic or unrelatable.

### Findings for animal health businesses

#### **Regulatory responsibilities**

- Strong majorities of respondents believe that the federal regulatory responsibilities for regulated animal health businesses are clear (60%) and are comfortable with their regulatory responsibilities (71%).
- A plurality (42%) of respondents seek information about animal health regulations monthly or quarterly. The most common sources of information used by respondents are the CFIA (77%), a Google search (59%) or industry associations (47%).

#### **Impressions of the CFIA**

- Sizeable and similar proportions of respondents say that they are very familiar with the activities with the CFIA (47%) and trust the CFIA to do what is right (42%). That considered, 18% are not familiar and 27% do not trust the CFIA.

#### **CFIA communications**

- Nearly all respondents (96%) say that they have interacted with the CFIA online in the past year, most commonly through email notifications (86%), the CFIA website (51%) or the My CFIA portal (50%).
- Of those who have, nearly half (48%) of respondents are satisfied with the information they have received from the CFIA, and nearly two-thirds (63%) of respondents feel that the frequency of information received from the CIFA is ‘about right’.
- 88% of respondents say that they most prefer to receive emails from CFIA, while 41% prefer notices in their My CFIA portal.

## **Antimicrobial resistance among livestock industry and producers**

- One-quarter (25%) of respondents say their concern about AMR impacts their desire to administer antimicrobials to their animals; however, only 10% of respondents say that they do not use antimicrobials in their animals.
- While availability (29%), cost (23%) and logistic considerations (19%) are factors that impact respondents' decision to administer vaccines, nearly half (47%) of respondents say that they use vaccines as a preventative alternative to antimicrobials in their animals.

## **Qualitative insights among veterinarians**

- Awareness of antimicrobial resistance was high among veterinarians.
- The majority felt that they had sufficient knowledge of antimicrobial use and antimicrobial resistance which they had gleaned primarily through school and continuing education, but also from the Government of Canada, the medical association, and in conversation with colleagues and peers.
- Many volunteered that online learning, webinars, were efficient ways to share information that might make it a little easier to gather more information.
- The vast majority of veterinarians do not use antimicrobials for disease prevention, some preferring vaccination. There was a sense that it is unnecessary in the vast majority of cases and contributes to resistance.
- Almost all veterinarians interviewed faced challenges when deciding on different treatment options for their patients/clients. These included cost, compliance, availability of options, availability of concentrations/sizes of medications/formulations.
- Antimicrobial resistance plays at least a minor role when providing treatment, if not a more considerable one if the circumstances warrant it. Things veterinarians take into consideration before prescribing are not wanting to create resistance on farms; having clients/patients finish the full course of (antibiotic) treatment; and, available information if culturing before treatment.
- Awareness of the CVMA FirstLine app was very low with only one veterinarian interviewed having used it and being somewhat familiar with it.
- Most have had cases of antimicrobial resistance in their practice on at least one occasion, although few mentioned having experience with any recent cases. As for detection, they were identified using sensitivity results or detected treatment failure.
- In terms of information needs, almost all agreed that there is enough guidance material on vaccines but not specifically about autogenous vaccines.

- Their preferred means of receiving information is email, webinars, in-person workshops, website information (on the CFIA's website) or industry association website.
- The idea of working for CFIA was very appealing and, in fact, preferable to working in a situation that requires terrible working hours, conditions and the threat of physical harm caused by the animals being treated.
- Many suggested the CFIA consider targeting mid- to late-career veterinarians as they could be either looking for a change or for an opportunity for part-time hours.

## Findings for the general public

### Familiarity with CFIA

- A majority of respondents (58%) say that they are not familiar with the activities of the CFIA, and only 9% say that they are very familiar.
- One-fifth (20%) of respondents have seen, read, or heard something from the CFIA recently, with 13% who say that they have read or watch content from CFIA and 10% have visited the CIFA website.

### Impression of CFIA activities and priorities

- Over four in ten respondents completely agree that the CFIA looks out for the best interests of Canadians (45%) or is believable as a science-based regulator (43%).
- One-quarter agree completely that CFIA's enforcement activities are strong enough (26%) or that CFIA treats businesses fairly (25%). Fewer have complete agreement that they know what the CFIA does (20%) or that getting information from the CFIA is easy (17%).
- Among a list of four CFIA priority areas, 'helping prevent the spread of plant pests and animal diseases in Canada' is more commonly ranked as the top priority among respondents (at 30%), while over half of respondents (54%) rank 'helping to keep international markets open to Canadian food, plant, and animal products' last among the four tested. In terms of perceived priority level, there is little that distinguishes 'helping to keep foreign animal diseases out of Canada' and 'verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada' among respondents.
- Awareness of the CFIA was very low among focus group participants and virtually none had seen, read, or heard anything about the CFIA recently or were aware of the CFIA's role in ensuring animals in Canada are safe and healthy. Awareness was mostly tangential and the CFIA was most often linked to inspections, labelling, and food safety.

## Travel

- Few (14%) dog and/or cat owners say that they have travelled with a pet. Among those who have, most (80%) have done so with a dog and one-fifth (19%) with a cat. While some have moved to another country (14%) or to Canada (11%) with a pet, the most common purpose of travel was for vacation (77%).
- While most focus group participants were pet owners, of mostly dogs and cats, very few had travelled with their pets outside of Canada. Only a couple of small dog owners had travelled with their dogs when they drove across the border into the U.S.
- Nearly half (45%) of respondents would say that they have limited or no understanding of regulations and requirements for bringing pets into Canada, while 11% claim to have a great deal of understanding.
- One-third (33%) of respondents say that they are aware the CFIA website contains information pertaining to bringing animals into Canada, including 4% who say that they have used that information.
- Over one-fifth (22%) of respondents say that they are very confident in the governments' ability to prevent the entry of serious or infectious animal diseases, and 46% say they have some confidence.
- Strong majorities of dog and/or cat owners say that they are aware there are requirements to bring an animal into another country (73%) or into Canada (71%), or when adopting a pet and bringing it back to Canada (69%).
- The vast majority of respondents who have travelled with a pet say that they are aware that if they are travelling with a pet they will need to meet specific criteria to enter into another country (89%) and returning to Canada (90%), and if they are planning to purchase or adopt a pet abroad, they will need to meet certain criteria in order to bring the pet back to Canada (79%).
- Some focus group participants indicated that they have brought back food when they have travelled outside of Canada. However, the types of food that they have typically brought back tended to be packaged foods, such as candies and treats, rather than fresh fruits, vegetables, or meats which they understood were prohibited.
- While not widely understood, some focus group participants were cognizant of the potential risk(s) associated with bringing food from another country into Canada. The biggest risk tended to be around bringing in foreign insects and/or bacteria.
- In terms of animal diseases, including those that exist elsewhere in the world, focus group participants named bird flu, mad cow, rabies, and swine flu.

- Very few focus group participants, if any, had seen, read, or heard anything about ASF over the past year or so.

### **Resources and reaction to CFIA website/communications**

- No focus group participant could remember, specifically, having visited the CFIA's website or page dedicated to traveling with pets, food or plants or the Automated Import Reference System (AIRS).
- When focus group participants were shown the page dedicated to traveling with pets, food, or plants, overall reaction was generally positive. The page was described as clear and visually appealing if not a little generic-looking. The vast majority felt the page included expected content and appeared easy to navigate.
- Reactions among focus group participants when shown the AIRS, were also generally positive. Most were pleased such a site existed. Being able to quickly check the requirements around specific commodities was appreciated and the site looked easy to use.
- The vast majority of focus group participants seemed to really like the Paws and Plan campaign. Participants noticed and appreciated the double meaning of the campaign slogan, Paws and Plan. The dog featured in the ads was described as very cute and likely to capture their attention.

### **Resources and reaction to African Swine Fever creative**

- When shown the page dedicated to protecting Canada's pigs from African Swine Fever to focus group participants, overall reaction was generally positive. The page was described as clear, visually appealing with a good mix of icons/illustrations and text, and very easy to navigate.
- Overall reaction among focus group participants to the Don't Pack Pork campaign was positive to mixed.

### **Message testing**

- When testing of the generic beware and declare campaign aimed at travellers, focus group participants felt the language used in all three messages tested was clear and understood. No one felt any of the wording/terminology was confusing or hard to understand.
- The message, "Do your part to protect Canada" was particularly resonant and persuasive. Focus group participants appreciated the responsibility the "do your part" conveyed, and the importance "to protect Canada". They also appreciated the message to declare "all foreign food, plants, and related products" which was clear and broad.

- While reaction to the message, “some food, plant and animal products are not allowed in Canada” was generally positive, some questioned the ambiguity.

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I hereby certify as a representative of Earnscliffe Strategy Group that the final 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.

Signed:

Date: April 23, 2024



Doug Anderson  
Principal, Earnscliffe