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d'inspection des aliments

Public Opinion Research for the Food Business Line 2024 to 2025

Canadian Food Inspection Agency

Final report

March 2025

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This public opinion research report presents the results of quantitative and qualitative research conducted by Quorus Consulting Group Inc. on behalf of the Canadian Food Inspection Agency between November 2024 and February 2025. The research involved six online focus groups with food industry representatives and 701 telephone surveys with individuals with responsibility for food safety and quality control within the Canadian food industry

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique pour le secteur alimentaire 2024 à 2025

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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:

A handwritten signature in black ink, appearing to read "R. Nadeau", is centered within a light gray rectangular box. The signature is fluid and cursive.

March 18, 2025
Rick Nadeau, President
Quorus Consulting Group Inc.

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Executive summary

Research purpose and objectives

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

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

This public opinion research aimed to gain a better understanding of regulated industry and their level of understanding, awareness, motivations, perceptions, and attitudes about:

- The various roles and responsibilities within the food safety system, in particular to measure the level of awareness of their own responsibilities in the system;
- Federal food regulations as they apply to food safety;
- Resource needs and barriers to complying with all regulatory requirements, to identify root causes of non-compliance and support development and implementation of compliance promotion, communications, and support service activities;
- Current services and programs such as My CFIA and Ask CFIA;
- Specific messaging, including compliance promotion tools and communications products;
- The effectiveness and satisfaction of the SFCR communications and related communications from various services, such as My CFIA and Ask CFIA;
- How information requirements change for businesses depending on demographic characteristics of ownership or clientele;
- Measure awareness and effectiveness of CFIA communications regarding food safety;
- Measure awareness and understanding of CFIA transparency regarding enforcement activities; and
- Levels of trust in the Agency and key components such as inspectors.

The research also explored the following topics among pre-federally regulated companies:

- Assess readiness / willingness to become federally licenced;
- Understand barriers to becoming federally licenced;
- Impression of level of effort to become federally licenced; and
- Specific communication requirements for becoming federally licenced.

Qualitative research results – focus groups with food businesses

General attitudes towards and awareness of food regulation and compliance

Perceptions of Canada’s approach to food regulation

Most participants agreed that Canada is very thorough when it comes to food regulation. Some compared the regulations in Canada to other countries and generally felt that Canada was more “heavily regulated”, which some viewed positively. Similarly, some felt that the quality of food produced in Canada was highly regarded by other countries, which benefited companies that export products.

However, many felt that the regulations were too strict. Inconsistency was also raised, especially in terms of sensing that some areas of the regulations were quite strict while other areas were less specific. Others described inconsistencies with information being shared with them from CFIA inspectors.

At this early stage of the conversation, concerns were raised mostly among smaller businesses who felt that CFIA regulations typically favoured larger, more established businesses that have more financial and human resources. The perception of some was that differences in provincial regulations and the overall compliance burden made it especially challenging for new businesses to grow or expand beyond their own provincial borders.

Outcome-based regulations

Familiarity with the term “outcome-based regulations” was fairly low although many could take a fairly accurate guess as to what this term referred to.

The concept of outcome-based regulations was appealing to many participants who agreed that what works for one business may not work for another, especially when considering different industries and business sizes.

Conversely, some shared concerns with the lack of guidance. This was especially heard from smaller businesses who found the regulations to already be quite overwhelming to try to interpret.

Some were unsure whether the current regulations were outcome-based or not. A few found certain areas or requirements to be much more prescriptive.

When specifically asked, many agreed that it would be helpful if the CFIA provided examples of specific types of measures that could be put in place to meet the required outcomes.

Safe Food for Canadians Regulations (SFCR)

Familiarity with SFCR

Many had heard of the *Safe Food for Canadians Regulations (SFCR)*, but few were familiar with the specific requirements. Familiarity with the SFCR was higher among participants whose main role was food safety and/or quality control.

Many comply with third-party food safety regulations that, in their view, are more demanding than SFCR. As a result, they are also meeting SFCR requirements – they just use language that is a bit different.

Many did not feel they had any noteworthy challenges when it comes to complying with the requirements related to sanitation and food preparation. Some noteworthy challenges included:

- Consistency across staff / staff training
- Different rules/regulations for different components of production (e.g., from crop to combine to mill)
- Requirements for specific sanitation products, which can be hard to obtain due to shortages, lack of suppliers and cost
- Managing requirements around best before dates
- Inconsistencies between written regulations and what they hear from inspectors
- Different labeling requirements for imported products
- One-size-fits-all regulations

When asked what role, if any, the CFIA could play in helping address these challenges, feedback often pertained to improving consistency in regulations and how they are enforced by various inspectors. As well, some would benefit by being provided with clear examples of ways to follow regulations.

CFIA's role in food safety regulation

When asked to describe the role of the CFIA in their own words, participants generally described it as ensuring a level of safety and quality of food in Canada, ensuring regulations are being met and food is meeting a certain standard, and mitigating risk.

Reactions were mixed when considering whether the CFIA had helped their businesses comply with food regulations. A few positive examples included:

- Helpful experiences when contacting local offices for specific inquiries.
- A few described the CFIA as efficient and quick to react and resolve issues such as when there is a recall.

Ways in which the CFIA regulations were a challenge included:

- Inconsistencies and a lack of clarity when they had inquired about certain regulations.
- Provincially-regulated businesses found it challenging to expand their business across Canada, explaining that the process is complicated and costly.
- Smaller businesses also felt that the regulations generally favour larger companies, making it more difficult for smaller businesses to grow.
- There were some perceptions that foods being imported into Canada may be held to a lower standard compared to foods produced in Canada.

Effectiveness of SFCR communications

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

Interactions with CFIA inspectors were often described as negative and involving inconsistent feedback or instructions. Conversely, feedback on communications with other CFIA staff was generally positive.

When asked how the CFIA should improve moving forward, there was a general sense that the CFIA should strive to work with businesses to form more of a partnership rather than more of a one-way relationship. Some would also like to see a more direct or slightly more prescriptive approach at times.

CFIA tools

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

CFIA website

Several respondents had visited the website in the past couple of years.

Feedback on the website was mixed, with some describing it as well organized and easy to use. A few had used the live chat in the past which they found much faster than contacting the CFIA by telephone.

Others felt that it was hard to navigate and find information unless you know exactly what you are looking for. This was particularly the case for those with smaller businesses who were newer to the CFIA regulations.

With that said, many agreed that the website had improved over the last handful of years and felt the home page was more organized which makes it easier to find what you are looking for.

My CFIA

Fewer were familiar with My CFIA.

Of those who had experience with the portal, some found it self-explanatory and easy to use. It was said to be quick to use (especially compared to contacting the CFIA by phone) and overall, quite helpful. When experiencing issues, some found a contact at the CFIA to be helpful in assisting with inquiries.

Others found the portal confusing (including one having issues registering for the account). A few would appreciate a bit more initial guidance from CFIA on what the portal is used for, and how to navigate it.

Concept testing

Participants were shown some messaging and visual concepts being considered by the CFIA for SFCR compliance promotion ads that would appear online on websites they visit or in social media.

Taglines

Four taglines were tested without any accompanying visuals:

- A. Starting or expanding a food business? Know the rules
- B. Food business? Know the rules
- C. Got a food business? Get the rules
- D. Know the rules for food businesses

Initial reactions from participants were generally negative, with most saying the messages have a very “authoritarian” or “bossy” tone. This tone was not seen as welcoming and would not entice businesses to click on the ad to find out more information.

Participants offered various suggestions to improve the tone and make the messages more inviting. For instance, rather than “know the rules”, many felt “learn more about the rules” or “click here to find out more about the rules” would be more inviting. Potentially using the word “help” in the tagline to come across as more inviting.

Across the four messages shown, the most popular option was A. This option was especially popular among smaller and newer businesses and among business owners. Participants who worked in an established business and who were not the owners tended to prefer option D.

Taglines with visual component

Participants were then shown the taglines along with three visuals which could accompany them¹. Examples of how these images and taglines could be used together for advertisements were first shown.

Most of the participants preferred image 2 (an image of dry pasta). In terms of the preferred combination, 2A was the most popular, followed by 1A and 2D.

Participants tended to gravitate towards the visual concept that best represented the type of food business in which they work. Generally, image 2 was appreciated by some for its simplicity and neutrality. Many felt that the general approach to image 2 lent itself nicely to using different types of foods so even if the participant did not package or sell pasta, they still felt that it could apply to their business.

Qualitative research disclaimer

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

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

¹ The images used for concept testing can be found in the Detailed Results section of the full report.

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

Quantitative research results – telephone survey with Canadian food businesses

Awareness of food safety regulations

In terms of general priorities, 62% of federally regulated businesses reported managing public trust and corporate reputation as a high priority (61% among intraprovincial businesses²). A similar proportion of federally regulated businesses (60%) reported managing regulatory issues as a high priority, compared to 51% among intraprovincial businesses.

Fewer businesses cited implementing new technology or innovative solutions as a high priority (31% federally regulated, 24% intraprovincial only). Expanding sales beyond provincial boundaries was at least a medium priority for 12% of intraprovincial businesses.

Nearly two thirds of federally regulated businesses (64%) reported being very familiar (scores of 6 or 7 on a 7-point scale) with the CFIA, while another 26% were somewhat familiar (scores of 4 or 5). Familiarity with the CFIA was lower among intraprovincial businesses (45% very familiar, 32% somewhat familiar).

Roughly 4 in 5 federally regulated businesses (79%) believe they clearly understand the food safety regulations that apply to their business (scores of 6 or 7 on a 7-point scale). Results were similar among intraprovincial businesses (74%).

Nearly two thirds of federally regulated businesses (65%) reported being very familiar (scores of 6 or 7 on a 7-point scale) with the SFCR, while another 22% were somewhat familiar (scores of 4 or 5). Familiarity was lower among intraprovincial businesses, among whom 51% reported being very familiar and 32% were somewhat familiar.

More than three quarters of federally regulated businesses familiar with the SFCR (77%) had recently seen, heard, or read something about these regulations (67% among intraprovincial businesses).

Key findings among those familiar with the SFCR included:

- Most business representatives believed that the regulations applied to their business (91% federally regulated, 83% intraprovincial only).
- Slightly fewer believe that the regulations applied to online sales of food products (83% federally regulated, 73% intraprovincial only).

² For the purposes of this study, an Intraprovincial food business is one that exclusively sells their product within their own province or territory, either online or directly to consumers. They do not sell interprovincially, nor do they import from or export to locations outside Canada.

- A majority of federally regulated businesses that import (62%) were clearly aware that a licence is required to import food products into Canada, while 25% were somewhat aware.
- An identical proportion of federally regulated businesses (62%) were clearly aware of the requirement to update CFIA licensing information when adding food commodities or new processes (25% were somewhat aware).
- The most common compliance challenges were maintaining a written preventive control plan (17% federally regulated, 14% intraprovincial only), maintaining traceability records (14% federally regulated, 17% intraprovincial only) and implementing traceability labelling on products (15% federally regulated, 17% intraprovincial only).

Roughly a third of federally regulated businesses (34%) and 11% of intraprovincial businesses reported using a private food safety or quality control certification system.

The most used preventive measures were traceability documents (71% federally regulated, 61% intraprovincial only), traceability labelling (66% federally regulated, 54% intraprovincial only), and a written preventive control plan (64% federally regulated, 41% intraprovincial only).

Federally regulated businesses were more than twice as likely to have a Safe Food for Canadians Licence (63% compared to 28% among intraprovincial businesses).

Roughly half of intraprovincial businesses (49%) reported having preventive controls in place, but not a written plan (compared to 41% among federally regulated businesses).

Transparency

More than half (53%) of federally regulated businesses felt that the CFIA was very transparent (scores of 6 or 7 on a 7-point scale) when it comes to reporting and publishing non-compliance results (42% among intraprovincial businesses). A quarter of federally regulated businesses (25%) felt that the CFIA was somewhat transparent (scores of 4 or 5) compared to 32% of intraprovincial businesses.

Information search and understanding

When it comes to sources of information related to food safety regulations or requirements, the CFIA was cited most often by federally regulated businesses (37%, compared to 25% among intraprovincial businesses), while the internet in general was the primary source for intraprovincial businesses (31%, compared to 27% among federally regulated businesses).

The Government of Canada in general was also commonly cited as an information source across both audiences (15%, respectively), while intraprovincial businesses were more than twice as likely to mention the provincial government (19%, compared to 9% among federally regulated businesses).

Nearly half of federally regulated businesses (47%) recalled receiving information from the CFIA within the past year, more than twice as many among intraprovincial representatives (21%). Those who had received information from the CFIA most often reported receiving email notifications from the CFIA (81% federally regulated, 84% intraprovincial only).

Nearly half of those having received communication from the CFIA reported high satisfaction (scores of 9 or 10 on an 11-point scale; 47%, respectively). Slightly fewer reported moderate satisfaction (scores of 7 or 8; 39% federally regulated, 42% intraprovincial only).

Other key findings related to CFIA communications included:

- Most business representatives who had received information from the CFIA in the past year agreed that communications from the CFIA are clear and easy to understand (87% among both federally regulated and intraprovincial businesses).
- The types of information products respondents would most like to receive, irrespective of business segment, were checklists (23% federally regulated, 19% intraprovincial only), general web content (17% federally regulated, 15% intraprovincial only), and videos (17% federally regulated, 15% intraprovincial only).
- Email was by far the most preferred channel for receiving these products from the CFIA (86% federally regulated, 75% intraprovincial only).

Few businesses have had difficulty getting the information they needed from the CFIA over the past few years (16% federally regulated; 10% intraprovincial only). Federally regulated businesses were most likely to have experienced issues accessing industry and product-specific topics (25% compared to 6% among intraprovincial businesses). Intraprovincial representatives were more likely to cite topics related to regulations or regulatory changes (28% compared to 10% among federally regulated businesses).

Ask CFIA

Nearly three times as many federally regulated business representatives reported having used the Ask CFIA service when compared to intraprovincial businesses (15% compared to 6%).

Nearly two-thirds of these respondents (65% federally regulated, 64% intraprovincial only) reported high satisfaction (scores of 6 or 7 on a 7-point scale) and roughly a fifth (17% federally regulated, 18% intraprovincial only) reported moderate satisfaction (scores of 4 or 5).

Nearly a fifth of federally regulated businesses (39%) reported high satisfaction with changes the CFIA has made to digital services since the start of the COVID pandemic (scores of 6 or 7 on a 7-point scale) compared to 22% of intraprovincial businesses. Roughly a third of respondents (35% federally regulated, 30% intraprovincial only) reported moderate satisfaction (scores of 4 or 5).

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

Detailed results

Research purpose and objectives

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

The SFCR generally applies to food for human consumption (including ingredients) that is imported, exported, or inter-provincially traded for commercial purposes. It also applies to the slaughter of food animals from which meat products to be exported or inter-provincially traded may be derived. The regulations had a graduated coming into force schedule that started in January 2019, beginning with businesses that were previously registered under commodity-specific regulations (e.g. meat, eggs, fish and seafood, dairy), and ending in July 2020 for businesses in the manufactured food sector with some requirements being phased in based on food commodity, type of activity and business size. As of November 1, 2022, the CFIA is conducting compliance activities of the SFCR requirements for all food sectors, including the final sector to be on-boarded – the manufactured food sector (MFS). SFCR introduced three fundamental components that apply to most food businesses: licensing, preventive controls and traceability requirements.

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

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

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

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

by requiring businesses that import or prepare food for export or interprovincial trade to trace their food back to their supplier and forward to whom they sold their products.

The main objective of this research was to gain insights into the views of Canadian food businesses on food safety and food safety regulations.

The research focused on small food businesses, food importers and exporters, and the manufactured food sector. As well, a particular topic of focus was on the current level of awareness and satisfaction with service from the CFIA and the level of guidance for industry surrounding regulatory requirements of food products. The research will inform effective implementation, communications, and compliance with the SFCR.

Specifically, this public opinion research aimed to gain a better understanding of regulated industry and their level of understanding, awareness, motivations, perceptions, and attitudes about:

- The various roles and responsibilities within the food safety system, in particular to measure the level of awareness of their own responsibilities in the system;
- Federal food regulations as they apply to food safety;
- Resource needs and barriers to complying with all regulatory requirements, to identify root causes of non-compliance and support development and implementation of compliance promotion, communications, and support service activities;
- Current services and programs such as My CFIA and Ask CFIA;
- Specific messaging, including compliance promotion tools and communications products;
- The effectiveness and satisfaction of the SFCR communications and related communications from various services, such as My CFIA and Ask CFIA;
- How information requirements change for businesses depending on demographic characteristics of ownership or clientele;
- Measure awareness and effectiveness of CFIA communications regarding food safety;
- Measure awareness and understanding of CFIA transparency regarding enforcement activities; and
- Levels of trust in the Agency and key components such as inspectors.

The research also explored the following topics among pre-federally regulated companies:

- Assess readiness / willingness to become federally licenced;
- Understand barriers to becoming federally licenced;
- Impression of level of effort to become federally licensed; and
- Specific communication requirements for becoming federally licenced.

Qualitative research results – focus groups with food businesses

General attitudes towards and awareness of food regulation and compliance

Perceptions of Canada’s approach to food regulation

To begin the sessions, participants were asked to generally describe Canada’s approach to food regulation. Participants were asked to discuss Canada’s approach in general, not just the approach used by the CFIA.

Overall, most participants agreed that Canada is very thorough when it comes to food regulation. Some compared the regulations in Canada to other countries and generally felt that Canada was more heavily regulated, which some viewed positively. Similarly, some felt that the quality of food produced in Canada was highly regarded by other countries, which benefited companies that export products.

However, many felt that the regulations were too strict and often times, inconsistent. For example, some explained that some areas of the regulations were quite strict while other areas were less specific. Furthermore, some perceived a double standard where products imported to Canada are not always held to the same standards as those produced and sold within Canada when it comes to requirements such as labelling, temperature controls or elements related to how food is grown or how animals are raised.

Others described inconsistencies with information being shared with them from CFIA inspectors. They felt that different inspectors varied in how “picky” they were on certain rules, which sometimes made it complicated to know how to interpret or best follow the regulations. With that said, a few described the shift to outcome-based approaches which they felt was an improvement.

Concerns were raised mostly among smaller businesses who felt that CFIA regulations typically favoured larger, more established businesses (that have more financial and human resources) and made it very challenging for new businesses to emerge or expand. As well, smaller businesses, particularly those in the Prairies and Western Canada described more challenges

surrounding their efforts in becoming federally regulated due to the discrepancy between regulations across provinces and the high cost associated.

Outcome-based regulations

Familiarity with the term “outcome-based regulations” was fairly low.

A few had heard the term before through communications with the CFIA such as through their inspector. Those less familiar with the term could often take a fairly accurate guess as to what this term referred to.

“It would be that you expect a certain quality with some measurable standard at the end, but you don’t dictate how a business would achieve that standard.” – food processor and retailer, Ontario

After participants shared what they thought outcome-based regulations were, the moderator provided the following explanation:

An outcome-based regulation is one that specifies the desired result that a regulation is intended to achieve, rather than describing a specific process or action that must be followed to achieve compliance, which are known as prescriptive regulations.

Upon hearing the explanation, many seemed to be familiar with the concept or the approach even though they did not necessarily know it by name as “outcome-based regulations.”

The concept of outcome-based regulations was appealing to many participants who agreed that what works for one business may not work for another, especially when considering different industries and business sizes. Additionally, some explained that processes can be different across different plants or food products which can sometimes make interpreting regulations challenging. Thus, outcome-based regulations were said to be an inclusive approach which take into account different business types and sizes, which are unique in their procedures and best practices.

“It’s a different process from one plant to another, and within a certain sector...There’s so many factors and trying to peg hole everybody into the same hole, that’s where the challenges come into play. And actually, a lot of aggravation comes into owners and businesses and QA managers, because we don’t know. And we had to follow this rule and our last plan. So why don’t we have to follow it here? This allows us to mold our ways based on how we process things, as long as we get the end results.” – food importer/exporter, processor/manufacturer and wholesaler/distributor, Ontario

Conversely, some shared concerns with the lack of guidance towards compliance. This was especially heard from smaller businesses who found the regulations to already be quite overwhelming to try to interpret while also taking care of day-to-day business operations.

“I feel like that’s where sometimes it gets kind of lost on us. They don’t give us enough direction, but they expect us to know how to get that result.” – food retailer and wholesaler/distributor, New Brunswick

Some were unsure whether the current regulations were outcome-based or not. A few found certain areas or requirements to be much more prescriptive. With that said, some felt that might not be a bad thing as particular areas of the regulations may need to be a bit prescriptive in order to avoid misinterpretation.

“I like the less prescriptive outcome-oriented approach, but there has to be some level of clarity in the regulations. So, maybe a little bit of prescription in there to help navigate.” – food retailer and processor/manufacturer, Ontario

When specifically probed on the topic, many agreed that it would be helpful if their business was provided with examples of specific types of measures that could be put in place to meet the required outcomes.

Safe Food for Canadians Regulations (SFCR)

Familiarity with SFCR

Many had heard of the *Safe Food for Canadians Regulations (SFCR)*, however most admitted they were not particularly familiar with the specific requirements. Those whose main role was food safety and/or quality assurance tended to be more familiar while some others had heard the term or acronym but explained that there was someone else within their company who dealt with these regulations.

Of those who were aware of the SFCR, feedback was mixed when discussing whether the regulations were outcome-based, with most admitting that they did not know enough to answer.

For the most part, participants were not able to list any of the specific safety requirements in the SFCR off the top of their head. The few who could list specific requirements mentioned labelling, preventive controls and traceability.

“From my understanding I think [the SFCR] is set up to bring in broad laws from different parts of government, labeling, ingredients, weight measures. All those things are bundled into one. As far as food safety, really just maintaining control of your parameters, of your products and processes... you may not get there the same way as everyone else but as

long as you can maintain and show and validate control, I think you've done your job meeting the outcome-based regulation.” – food retailer and processor/manufacturer, Alberta

It was not unusual for a company to explain that they follow third party food safety regulations that, in their view, are more demanding than SFCR and that as a result, they are also meeting SFCR requirements. For instance, a few mentioned components of the Hazard Analysis Critical Control Point (HACCP), which some felt were similar or overlapped with the SFCR. Generally, their efforts appear to be more focused on the third-party requirements rather than on SFCR specifically.

When some of the SFCR components were mentioned by participants or the moderator, other participants seemed to feel they made sense, with some starting to recall these requirements a bit more.

Participants were probed on the key safety requirements of the SFCR related to food preparation and other controls (such as sanitation controls) and asked to describe some of the main challenges their business faces.

Many did not feel they had any noteworthy challenges in these areas. They explained that they have specific plans related to sanitation and food preparation which helped avoid challenges.

That said, a variety of challenges related to food preparation and sanitation controls were raised across the sessions, including:

- Staff training and consistency across staff is a common challenge when it comes to sanitation control. In the end, no matter how thorough training manuals might be, sanitation remains a human activity which can vary in quality and consistency from one person to the next. This becomes increasingly challenging when factors such as high turnover and language barriers come into play.
- Lack of clarity on how regulations apply across different areas on a farm (for example, where to draw the line when the product is a crop, on a combine, in the grain mill, etc.)
- Requirements for specific sanitation products, which can be hard to obtain due to shortages, lack of suppliers and cost.
- Managing requirements around best before dates, such as:
 - In more rural areas, it is harder to get food to destination before best before dates.
 - Food waste and product loss due to best before dates when the product is likely safe to consume.

- Discrepancies between written regulations and what is asked for at onsite inspections.
- Strict labelling requirements which do not seem to be enforced on products coming into Canada from other countries.
- Lack of regulation for certain businesses that sell direct to the consumer, whereas their own business is highly regulated
- Invasive species/pests impacting products.
- Having the same requirements irrespective of business size (for example, required to have the same number of sinks as a much larger business despite less physical space and smaller business size).

When asked what role, if any, the CFIA could play in helping address these challenges, feedback often pertained to consistency in regulations and how they are enforced by various inspectors. As well, some would benefit by being provided with clear examples of ways to follow regulations.

“The simpler it is for everybody to follow a standard operation or procedure the better it is... The CFIA could help that by simplifying... a five-step cleaning procedure for instance.”

– food retailer and wholesaler/distributor, Nova Scotia

There was also a suggestion that the CFIA requirements should take the company size into consideration when enforcing requirements. This concern was most noted by smaller, local businesses that have or have had plans of expanding. For instance, a local grower can sell at their farmgate but cannot deliver to their neighbours. This type of constraint limits how small businesses can grow. Efforts by CFIA to support small businesses will translate into growth and an increased capacity for them to take on greater compliance burden over time.

Participants were also asked what they felt was behind some of the success their business has experienced in meeting the requirements when it comes to food preparation and other controls such as sanitation controls.

For some, they considered success by not having problems, which they attributed to simply adhering to the regulations closely on their own rather than any help from the CFIA. A few felt that the outcome-based approach to regulations helped with their businesses’ success as they could adapt procedures to what works best for their unique business needs, as long as the end result meets what is expected of them, which was more efficient and cost-effective.

CFIA's role in food safety regulation

When asked to describe the role of the CFIA in their own words, participants generally described it as ensuring a level of safety and quality of food in Canada, ensuring regulations are being met and food is meeting a certain standard, and mitigating risk.

“To maintain a standard of safety that ensures that all Canadians are eating a food that’s not going to make them sick.” – food retailer, and processor/manufacturer, Yukon

When asked whether the CFIA had helped their business or made it easier for their company to comply with food regulations in Canada, responses were somewhat mixed.

Some explained that the CFIA had been helpful in the past when themselves or members of their business had inquiries about certain regulations or rules. Feedback was typically more positive when discussing CFIA communications with local offices (such as over the phone) rather than communications with inspectors. For example, some explained that they had reached out to their local office when they were dealing with new products or processes and were unsure of which regulations applied. In these cases, the CFIA employees were said to be helpful at directing them to the required information, answering any questions or directing the question to another CFIA contact if they did not know the answer themselves.

“Dans le passé, j’ai eu à faire des certificats de vente libre pour pouvoir faire de l’exportation. Puis, la première fois que j’avais eu à faire ça, je ne savais pas comment donc un appel au bureau de l’ACIA local. Puis ils m’ont aidé à le faire, puis par la suite, c’était très simple de les faire en ligne par moi-même.” – food exporter, processor/manufacturer and wholesaler/distributor, Quebec

Also, some described the CFIA efficient and quick to react and resolve issues such as when there is a recall. This was deemed very helpful from a distributor standpoint.

Conversely, others shared more critical feedback and felt that the CFIA was more of an obstacle than an asset to their business. For example, some received mixed information when they had reached out with guidance-related questions and others described being sent back and forth to different websites without being given a clear answer or solution.

Businesses regulated only at the provincial level often brought up difficulties when trying to expand their business across Canada. These participants explained that the process was too complicated and costly. As well, the lack of consistency across provincial regulations required them to change many of their processes in order to comply. Smaller businesses also felt that the regulations generally favour larger companies or grocery stores and make it more difficult for smaller, local businesses to grow.

There were some perceptions that foods being imported into Canada might not be enforced as strictly as foods produced within Canada. For example, some suspected that animals raised for meat in other countries are not monitored for medications whereas the regulations in Canada are stricter. This was thought of as a double standard that put them at a competitive disadvantage.

It was suggested that the CFIA could be slightly more prescriptive at times, especially when dealing with new businesses who are still learning the regulations and can sometimes feel overwhelmed or unsure of where to begin.

Effectiveness of SFCR communications

Few participants recalled receiving such communications directly from CFIA. A few explained that they were subscribed to CFIA bulletin emails, which they typically described as being not particularly relevant to their own business, as the emails were not segmented by industry. For the most part, communications about regulations came from third parties such as newsletters from industry associations or informal communications with others within their industry.

Some described their communications with CFIA employees are friendly and helpful.

“When I was new at farming, I sent some livestock that one of them I shouldn't have sent. I'll be honest, it was a mistake on my part, just with lack of awareness of the rules. So, I got a phone call, but the person was very lovely and asked questions and educated me, and they didn't throw the book at me right away. This was an opportunity for learning, and I felt that was that was super awesome... That's a that was a good interaction that I had with the CFIA.” – food retailer and processor/manufacturer, Ontario

Others had negative interactions, particularly with inconsistency between inspectors who request different processes or share inconsistent information. As well, a few mentioned negative experiences where they felt the inspector was not polite, seemed to be on a “power trip” or was even considered to be abusing their power.

Participants felt that communications from the CFIA could be improved in various ways. Firstly, there was a general sense that the CFIA should strive to work with businesses to form more of a partnership rather than more of a one-way relationship. Some would also like to see a more direct or slightly more prescriptive approach at times. This would help businesses avoid misinterpreting the regulations and to ensure they handle processes correctly the first time in order to avoid costly or time-consuming issues down the line where they may have to re-do things in order to comply.

“Black and white is exactly what we want. Don’t think you’re hurting our feelings, you are crushing us with redundancies later on when we tried to do what we thought you wanted us to do and then you got us to un-do it. So just tell us what you want” – food producer and processor/manufacturer, Manitoba

“We’ve got a very good caliber of working with not working against. And that’s not a bad thing – I think lot of times the CFIA thinks they need to be policing and be against, but we all want the same thing at the end of the day. We all want safe food.” – food retailer, importer/exporter, processor/manufacturer, and wholesaler/distributor, Ontario

CFIA tools

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

CFIA website

Several respondents had visited the website in the past couple of years.

Feedback on the website was mixed, with some describing it as well organized and easy to use. A few had used the live chat in the past which they found much faster than contacting the CFIA by telephone.

Others felt that it was hard to navigate and find information unless you know exactly what you are looking for. This was particularly the case for those with smaller businesses who were newer to the CFIA regulations.

With that said, many agreed that the website had improved over the last handful of years and felt the home page was more organized which makes it easier to find what you are looking for.

My CFIA

Fewer were familiar with My CFIA.

Of those who had experience with the portal, some found it self-explanatory and easy to use. It was said to be quick to use (especially compared to contacting the CFIA by phone) and overall, quite helpful. When experiencing issues, some found a contact at the CFIA to be helpful in assisting with inquiries.

Others found the portal confusing (including one having issues registering for the account). A few would appreciate a bit more initial guidance from CFIA on what the portal is used for, and how to navigate it.

Toolkit for new food businesses

The CFIA Toolkit for new food businesses was also briefly shown in some groups. Participants were not familiar with this webpage; however, they felt that it looked interesting and helpful based on the headings they were shown.

Concept testing

Participants were shown some messaging and visual concepts being considered by the CFIA for ads that would appear online on websites they visit or in social media. It was further explained that each of these ads are clickable, taking them to a website with more information.

Taglines

First, four taglines were tested without any accompanying visuals:

- E. Starting or expanding a food business? Know the rules
- F. Food business? Know the rules
- G. Got a food business? Get the rules
- H. Know the rules for food businesses

Initial reactions from participants were generally negative, with most saying the messages have a very “authoritarian” or “bossy” tone. Some also felt the messages were too blunt. They further explained that through these messages the CFIA did not come across as helpful or a partner but rather as a strict rule imposer that is telling food businesses what to do. This tone was not seen as welcoming and would not entice businesses to click on the ad to find out more information.

“If the intent is ‘we’re here to help’, none of these are working... [the CFIA] should be more of a helping hand and a partner.” – food retailer, Prince Edward Island

Participants offered various suggestions to improve the tone and make the messages more inviting, such as:

- Rather than “know the rules”, many felt “learn more about the rules” or “click here to find out more about the rules” would be more inviting. Potentially using the word “help” in the tagline come across as more inviting.
 - Additionally, some felt that to attract those with new businesses who are just getting started, a more welcoming tagline such as “Starting a food business?” followed by “How can we help?”, “Contact us to get started” or “CFIA is a great place to start.”

- Some suggested including a clear reference to a website or a hyperlink, especially one to a checklist or list of steps.
- Referring to “current rules” instead of just “rules” could encourage those who are already familiar with the regulations to visit the website to review or double check that they are up to date with any changes.
- Option D could read as: “Get to know the rules for your food business”, or which was seen as both more inviting and more personalized.

Some discussion was had around the use of the term “rules” versus “regulations.” In the English sessions, participants typically preferred the use of “regulations”, which came across as less harsh. In the French session however, participants preferred “les règles” rather than “la réglementation.”

Across the four messages shown, the most popular option was A (Starting or expanding a food business? Know the rules). This option was especially popular among smaller and newer businesses that were in growth mode (including businesses currently regulated at the provincial level only who are interested in expanding) and among business owners. Participants who worked in an established business and who were not the owners tended to prefer option D.

Taglines with visual component

Participants were then shown the taglines along with three visuals which could accompany them. Examples of how these images and taglines could be used together for advertisements were first shown:





Given this context, participants were then asked which tagline and image combination they prefer:

<p>1</p> 	<p>3</p> 	<p>A. Starting or expanding a food business? Know the rules</p> <p>B. Food business? Know the rules</p> <p>C. Got a food business? Get the rules</p> <p>D. Know the rules for food businesses</p>
<p>2</p> 		

Most of the participants opted for image 2 and in terms of the preferred combination, 2A was the most popular, followed by 1A and 2D.

Participants tended to gravitate towards the visual concept that best represented the type of food business in which they work. For example, those involved in packaging, distribution or wholesaling tended to prefer image 2 while those involved in transformation or production tended to prefer image 1. Those involved in agriculture or farming had some trouble finding the image that best spoke to them.

Image two was appreciated by some for its simplicity and neutrality. Many felt that the general approach to image 2 lent itself nicely to using different types of foods so even if the participant did not package or sell pasta, they still felt that it could apply to their business. A few felt that pasta did not necessarily come to their mind when they think of federally regulated food and felt that the image should instead feature various meats and cheeses or a charcuterie board. Another suggestion was to include bright foods such as fresh produce would be appealing and catch their attention.

Participants did not have many other suggestions for the visuals other than to have more types of foods represented in the image. Other comments on the visuals shown included:

- Image 1 reminded some participants of an ad related to healthcare, pharmaceuticals, or for a restaurant.
- Some also felt that image 1 seemed a bit too staged with exaggerated smiles.
- Many participants could not clearly see what was happening in image 3 and did not understand the relation to food, so it was often dismissed for that reason.
- A few felt that if people are shown in the images, they should be dressed according to the rules, such as correctly wearing hairnets and beard nets.

Quantitative research results – food business survey

Food business priorities

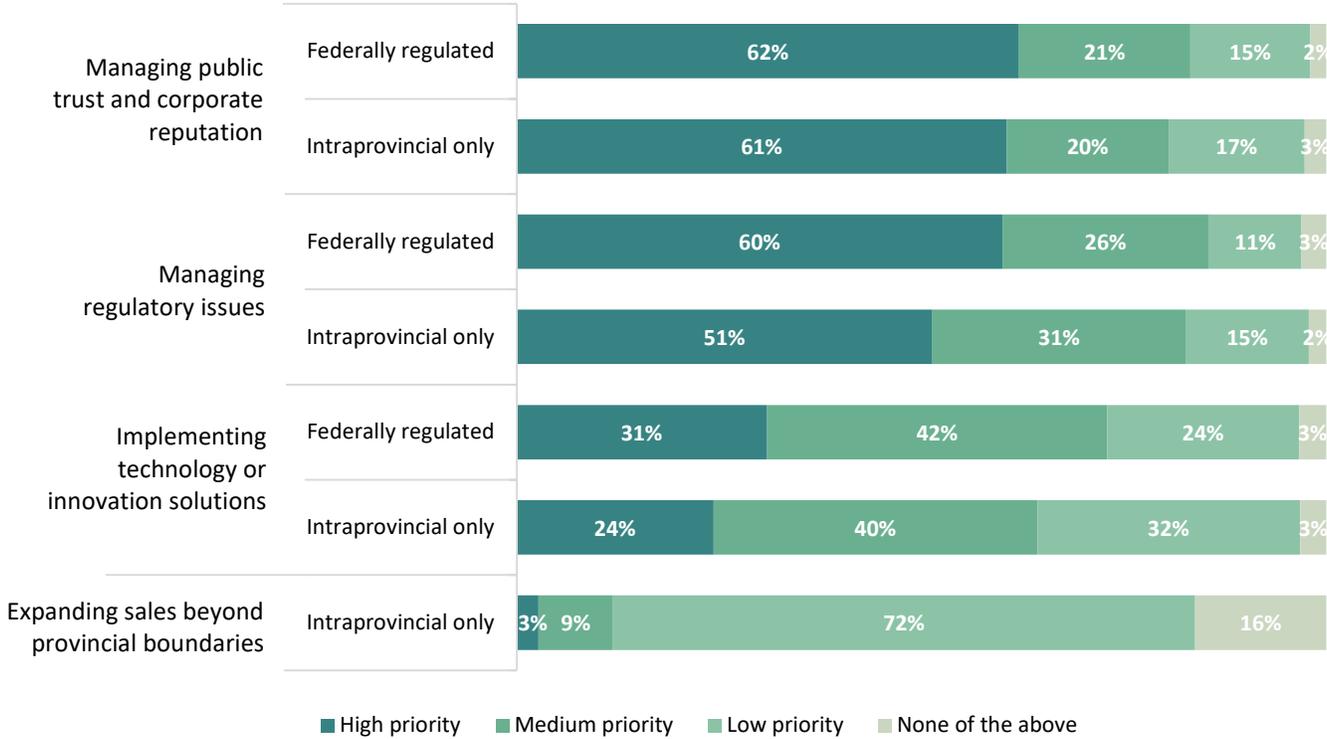
Business representatives were asked the extent to which specific priorities applied to their business over the last couple of years.

While the ranking of priorities was similar for both business segments, federally regulated respondents placed greater emphasis on each priority.

More than three in five federally regulated businesses (62%) reported managing public trust and corporate reputation as a high priority, dropping slightly to 61% among intraprovincial businesses.

A similar proportion of federally regulated businesses (60%) reported managing regulatory issues as a high priority, compared to 51% among intraprovincial businesses. Despite not being rated as the highest priority compared to managing public trust and corporate reputation, managing regulatory issues was at least a medium priority for both audiences (86% federally regulated, 83% intraprovincial only).

Figure 1. Priorities among food businesses



Q1AA. Thinking about the past two years, have the following been high, medium, or low priority for your company? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Implementing new technology or innovative solutions was a high priority for nearly a third of federally regulated businesses (31%) and nearly a quarter of intraprovincial businesses (24%). This area was primarily considered a medium priority for businesses (42% federally regulated, 40% intraprovincial only).

Expanding sales beyond provincial boundaries was a high priority for just 3% of intraprovincial businesses while 9% of this segment felt it was a medium priority. A much larger proportion of intraprovincial businesses rated expanding sales beyond provincial boundaries as a low priority (72%) while another 16% did not provide a response. This priority area was not presented to federally regulated businesses.

Key findings

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

Federally regulated businesses

- Businesses in Quebec (73%) and Atlantic Canada (71%) compared to those in Ontario (50%), and,
- Large/medium sized businesses (70%) compared to small (53%) or micro businesses (57%).

Intraprovincial only businesses

- Businesses in Quebec (76%) compared to those in Ontario (52%) and Western Canada (48%).

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

Federally regulated businesses

- Businesses in Atlantic Canada (74%) and Quebec (69%) compared to those in Western Canada (54%) and Ontario (53%), and,
- Large/medium sized businesses (69%) compared to small (50%) or micro businesses (54%).

Intraprovincial only businesses

- Businesses in Quebec compared to Ontario (68% versus 33%),
- Wholesalers/distributors compared to agriculture businesses (67% versus 41%), and,
- Large/medium sized businesses compared to micro businesses (63% versus 44%).

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

Federally regulated businesses

- Businesses in Atlantic Canada compared to those in Western Canada (46% versus 25%), and,
- Large/medium sized businesses compared to small businesses (37% versus 24%).

Those more likely to indicate that expanding sales beyond provincial boundaries was a low priority included:

Intraprovincial only businesses

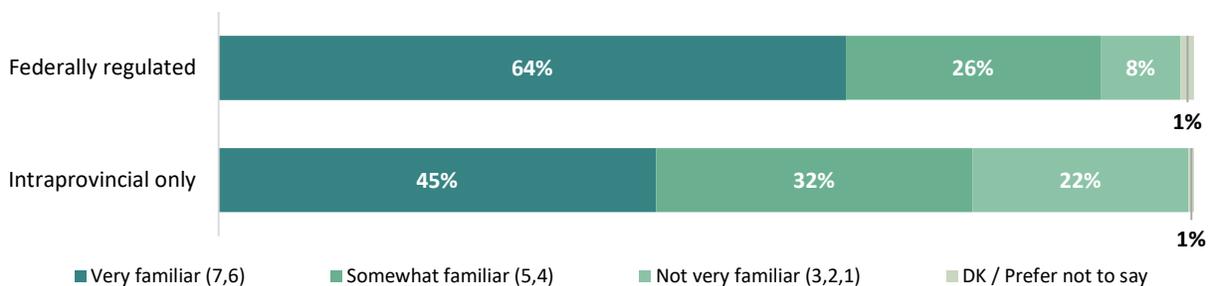
- Business representatives in Ontario compared to Quebec (80% versus 65%)

Familiarity with CFIA

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

Nearly two thirds of federally regulated businesses (64%) reported being very familiar (scores of 6 or 7) with the CFIA, while another 26% were somewhat familiar (scores of 4 or 5). Familiarity with the CFIA was lower among intraprovincial businesses with 45% reporting being very familiar, 32% reporting being somewhat familiar, and 22% not very familiar (scores of 3, 2 or 1).

Figure 2. Familiarity with CFIA



QAA1. How familiar would you say your company is with the activities of the Canadian Food Inspection Agency? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

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

Federally regulated businesses

- Businesses in Atlantic Canada compared to those in Quebec (80% versus 57%), and,
- Large/medium sized businesses (75%) compared to small (31%) or micro businesses (33%).

Intraprovincial only businesses

- Wholesalers/distributors (67%) and processors/manufacturers (51%) compared to agriculture businesses (29%), and,
- Large/medium sized businesses compared to micro businesses (57% versus 36%).

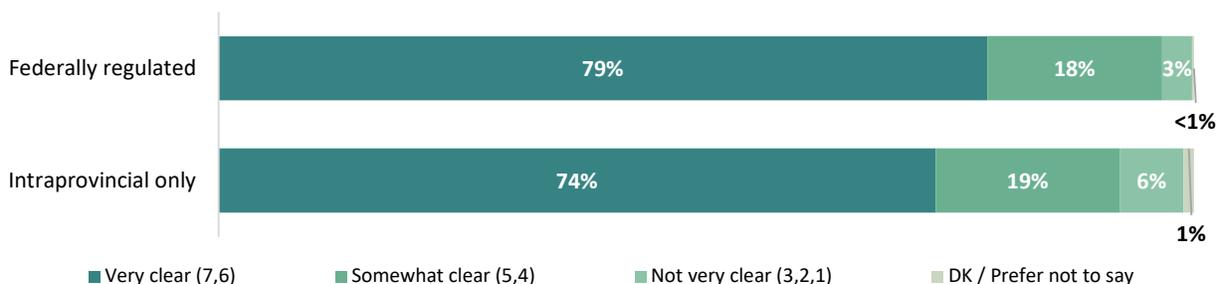
Understanding of and familiarity with food safety regulations

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

Roughly 4 in 5 federally regulated businesses (79%) believe they clearly understand the food safety regulations that apply to their business (scores of 6 or 7). An additional 18% would say they understand the applicable regulations somewhat well (scores of 4 or 5), while just 4% reported a low level of understanding (scores of 1, 2 or 3).

Results were similar among intraprovincial businesses, with 74% reporting that they clearly understand the food safety regulations that apply to their business and 19% saying they understand somewhat well. Another 6% reported a low level of understanding.

Figure 3. Understanding of applicable food safety regulations



QA1. On a scale of 1 to 7, where 1 means “not at all clear” and 7 means “very clear”, how well do you feel that you understand the food safety regulations that apply to your business? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

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

Federally regulated businesses

- Businesses in Ontario compared to those in Quebec (85% versus 72%), and,
- Large/medium sized businesses compared to micro businesses (85% versus 68%).

Intraprovincial only businesses

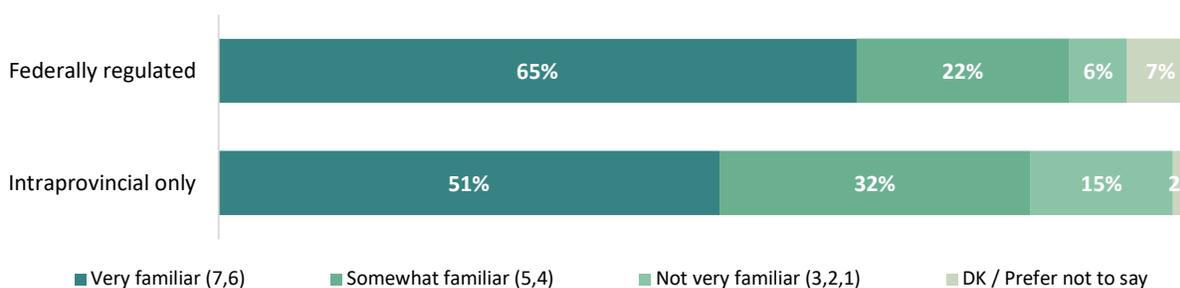
- Micro businesses compared to small businesses (80% versus 60%).

Business representatives were asked to rate their familiarity with the *Safe Food for Canadians Regulations* (SFCR). A 7-point scale was used with 7 representing “very familiar” and 1 representing “not at all familiar”.

Nearly two thirds of federally regulated businesses (65%) reported being very familiar (scores of 6 or 7) with the SFCR, while another 22% were somewhat familiar (scores of 4 or 5). Only 6% were not very familiar (scores of 1, 2 or 3).

Familiarity with the SFCR was lower among intraprovincial businesses, among whom 51% reported being very familiar, 32% were somewhat familiar and 15% were not very familiar.

Figure 4. Familiarity with the SFCR



QA2ii. How familiar are you with the *Safe Food for Canadians Regulations*? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

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

Federally regulated businesses

- Processors/manufacturers (72%) and wholesalers/distributors (71%) compared to agriculture businesses (55%), and,
- Large/medium sized businesses compared to small businesses (72% versus 57%).

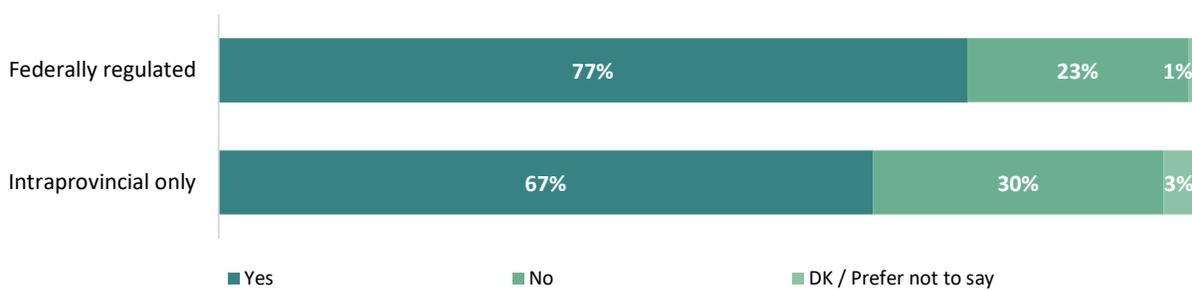
Intraprovincial only businesses

- Wholesalers/distributors (71%) compared to agriculture businesses (64% versus 42%).

Those at least somewhat familiar with the SFCR (a score of 3 or higher) were asked whether they had recently seen, heard, or read something about these regulations.

More than three quarters of federally regulated businesses familiar with the SFCR (77%) had recently seen, heard, or read something about these regulations. The equivalent figure among intraprovincial only businesses was lower at 67%.

Figure 5. Seen, read, or heard anything about SFCR



QA2. Have you seen, read or heard anything about *the Safe Food for Canadians Regulations*? Base: Businesses familiar with the *Safe Food for Canadians Regulations*, federally regulated, n=464; intraprovincial only, n=161.

Key findings

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

Federally regulated businesses

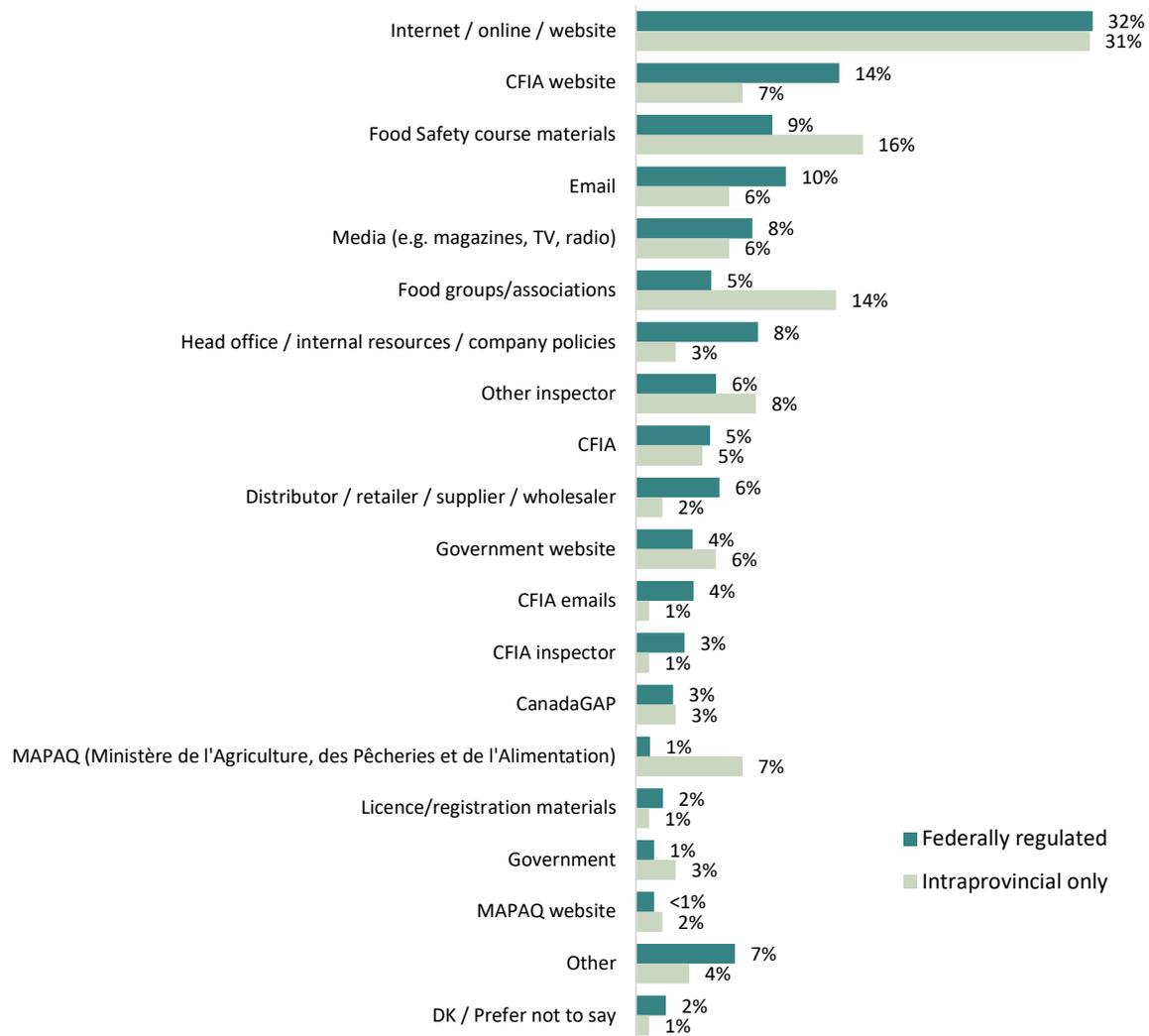
- Businesses in Quebec compared to those in Western Canada (85% versus 68%),
- Processors/manufacturers (85%), agriculture businesses (82%) and wholesalers/distributors (80%) compared to retailers (65%), and,
- Micro businesses compared to small businesses (86% versus 68%).

Those who reported having recently seen, heard, or read something about SFCR were asked where they may have seen, heard or read about these regulations. Results reveal that the internet is the most common source for both business segments.

More specifically, 32% of federally regulated and 31% of intraprovincial only businesses mentioned the Internet. Other sources included the CFIA website (14% federally regulated, 7% intraprovincial only), food safety course materials (9% federally regulated, 16% intraprovincial only), email (general; 10% federally regulated, 6% intraprovincial only), media (8% federally regulated, 6% intraprovincial only) and food group associations (5% federally regulated, 14% intraprovincial only).

Additional sources mentioned by no more than 8% of businesses included: internal resources, an inspector other than the CFIA, the CFIA, a distributor, retailer, supplier or wholesaler, a government website, CFIA emails, CFIA inspectors and CanadaGAP, among others.

Figure 6. Channels of information surrounding regulations



QA3. Where did you hear, see or read about the regulations? Base: Businesses that have seen, read or heard about the *Safe Food for Canadians Regulations*, federally regulated, n=356; intraprovincial only, n=108.

Key findings

Across sub-segments, the following differences were found:

Federally regulated businesses

- Wholesalers/distributors (29%) were more likely to mention the CFIA website compared to processors/manufacturers (16%), agriculture businesses (8%), and retailers (6%),

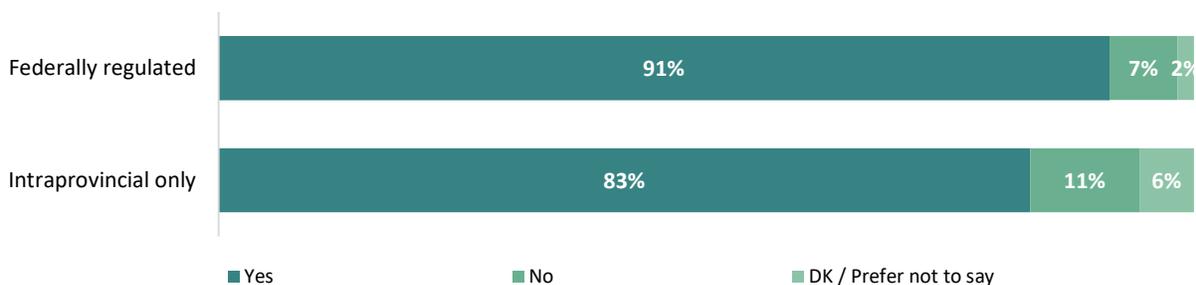
- Retailers were more likely to cite the following information sources compared to processors/manufacturers and wholesalers/distributors:
 - Head office/internal resources/company policies (16% - retailers versus 5% - processors/manufacturers, 4% - wholesalers/distributors)
 - Food safety course materials (15% - retailers versus 6% - processors/manufacturers, 4% - wholesalers/distributors)
- Businesses in Quebec (18%) or Ontario (17%) were more likely to mention the CFIA website compared to those in Western Canada (6%), and,
- Those in Atlantic Canada (22%) and Western Canada (17%) were more likely to cite email compared to those in Ontario (5%).

Intraprovincial only businesses

- Small businesses (42%) and micro businesses (38%) were more likely to cite general internet sources compared to medium/large businesses (11%), and,
- Those in Ontario were more likely to mention food groups/associations compared to those in Quebec (31% versus 6%).

Most business representatives familiar with the SFCR believed that the regulations applied to their business (91% federally regulated, 83% intraprovincial only).

Figure 7. Perceived relevance of new regulations



QA4. As far as you know, do you think the new *Safe Food for Canadians Regulations* will apply to your business? Base: Businesses familiar with the *Safe Food for Canadians Regulations*, federally regulated, n=464; intraprovincial only, n=161.

Across sub-segments, businesses more likely to think the SFCR regulations apply to their business included:

Federally regulated businesses

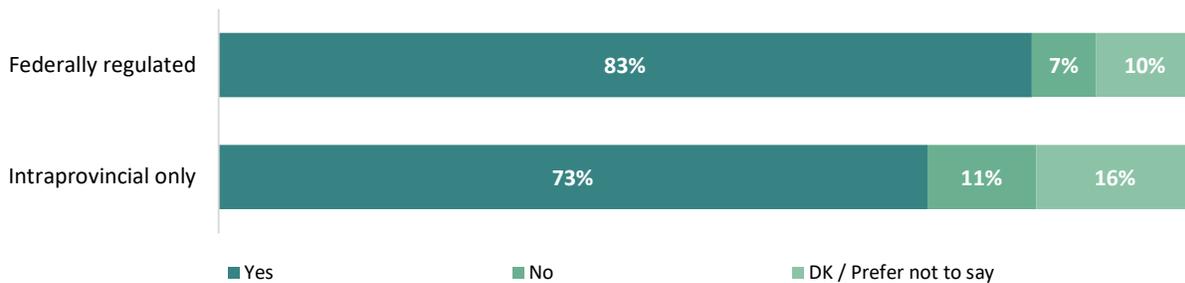
- Large/medium sized businesses (96%) compared to small (87%) and micro businesses (87%).

Intraprovincial only businesses

- Large/medium sized businesses compared to micro businesses (92% versus 79%).

Of those familiar with the SFCR, most business representatives believed that the regulations applied to online sales of food products (83% federally regulated, 73% intraprovincial only). A smaller proportion did not believe they applied (7% federally regulated, 11% intraprovincial only), while a noteworthy proportion were unsure (10% federally regulated, 16% intraprovincial only).

Figure 8. Perceived relevance of SFCR for online sales

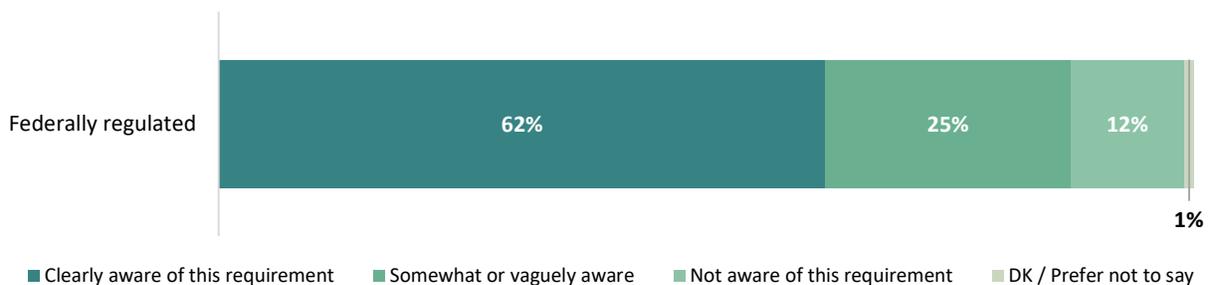


QA5. As far you know do you think the *Safe Food for Canadians Regulations* apply to on-line sales of food products? Base: Businesses familiar with the *Safe Food for Canadians Regulations*, federally regulated, n=464; intraprovincial only, n=161.

Federally regulated businesses familiar with the SFCR that also import were asked whether they were aware that an SFCR licence is required to import food products into Canada.

Just over three in five (62%) reported being clearly aware of this requirement, while 25% were somewhat or vaguely aware. Fewer respondents (12%) were not aware of this requirement.

Figure 9. Awareness of Safe Food for Canadians licence requirement



QA6. Were you aware that a Safe Food for Canadians licence is required to import food products into Canada? Would you say you were... Base: Federally regulated businesses familiar with the *Safe Food for Canadians Regulations* and import food products, n=299.

Key findings

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

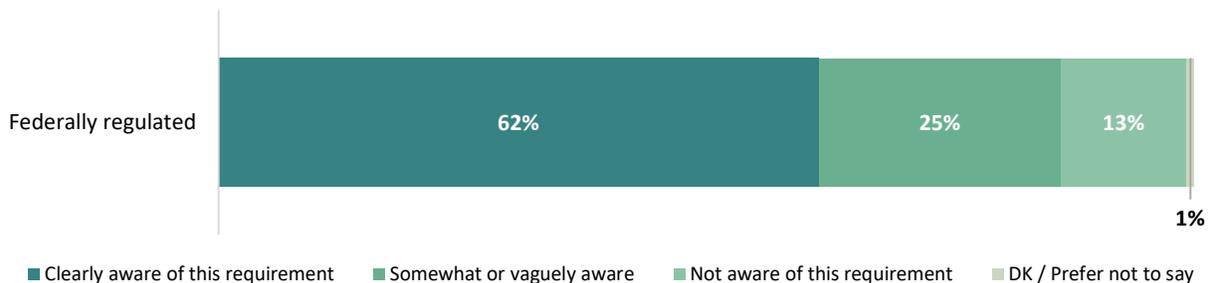
Federally regulated businesses

- Businesses representatives in Quebec (79%) compared to those in Ontario (64%) and Western Canada (47%),
- Wholesalers/distributors (83%) and processors/manufacturers (80%) compared to retailers (44%), and,
- Micro businesses (76%) compared to small businesses (55%) and medium/large businesses (58%).

Federally regulated business representatives familiar with the SFCR were asked whether they were aware of the requirement to update CFIA licensing information when adding food commodities or new processes.

A majority (62%) reported being clearly aware of this requirement, while 25% were somewhat or vaguely aware and 13% were not aware of this requirement.

Figure 10. Awareness of updated CFIA licensing information requirement



QA6A. Were you aware that your CFIA licensing information must be updated when adding food commodities or new processes? Would you say you were... Base: Federally regulated businesses familiar with the Safe Food for Canadians Regulations, n=464.

Key findings

Across sub-segments, businesses more likely to be clearly aware of the CFIA licensing information requirement included:

Federally regulated businesses

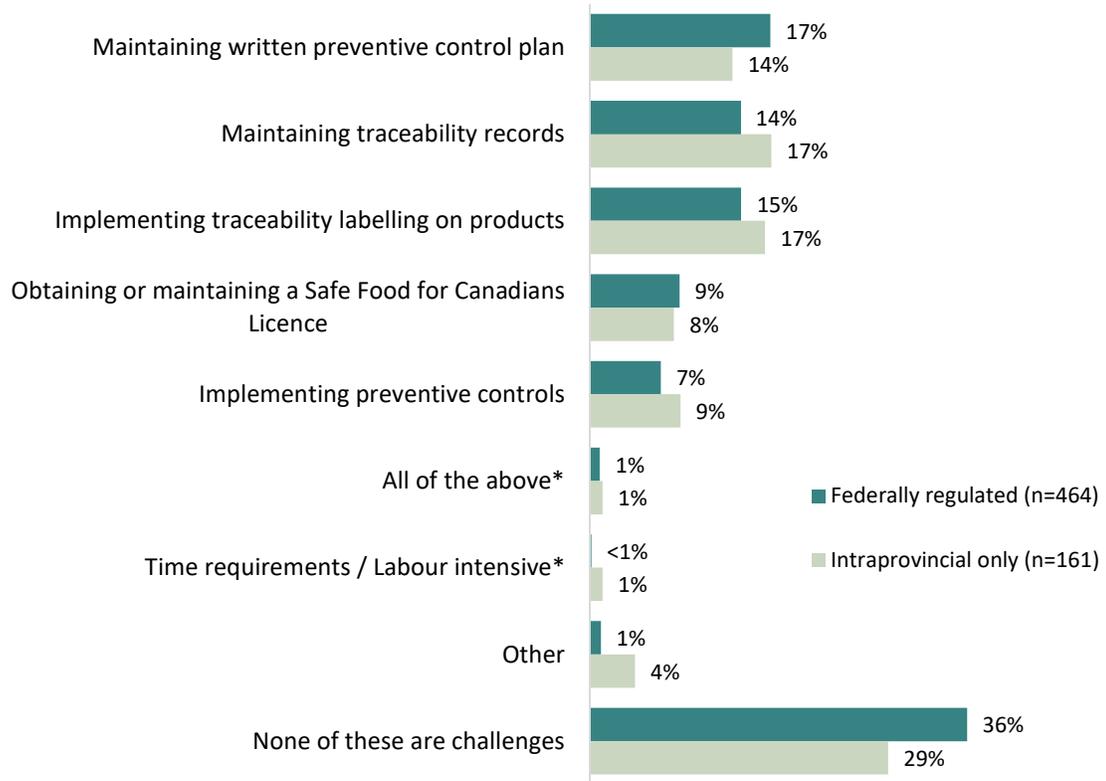
- Businesses in Ontario compared to those in Western Canada (69% versus 52%),
- Processors/manufacturers (72%) and wholesalers/distributors (71%) compared to retailers (54%) and agriculture businesses (50%), and,
- Large/medium sized businesses compared to small businesses (68% versus 54%).

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

Results reveal that both segments face similar challenges. The biggest challenges were maintaining a written preventive control plan (17% federally regulated, 14% intraprovincial only), maintaining traceability records (14% federally regulated, 17% intraprovincial only) and implementing traceability labelling on products (15% federally regulated, 17% intraprovincial only). Fewer felt their biggest challenge was obtaining/ maintaining the SFCR licence (9% federally regulated, 8% intraprovincial only) or implementing preventative controls (7% federally regulated, 9% intraprovincial only).

A third of federally regulated businesses (36%) felt that none of the requirements were challenges for their business compared to 29% of intraprovincial businesses.

Figure 11. Challenges meeting food safety requirements of the SFCR



QA7. From your perspective, which of the following food safety requirements of the SFCR is your biggest challenge? Would it be..? Base: Businesses familiar with the Safe Food for Canadians Regulations, federally regulated, n=464; intraprovincial only, n=161. *Option was not listed to respondents.

Key findings

Federally regulated businesses

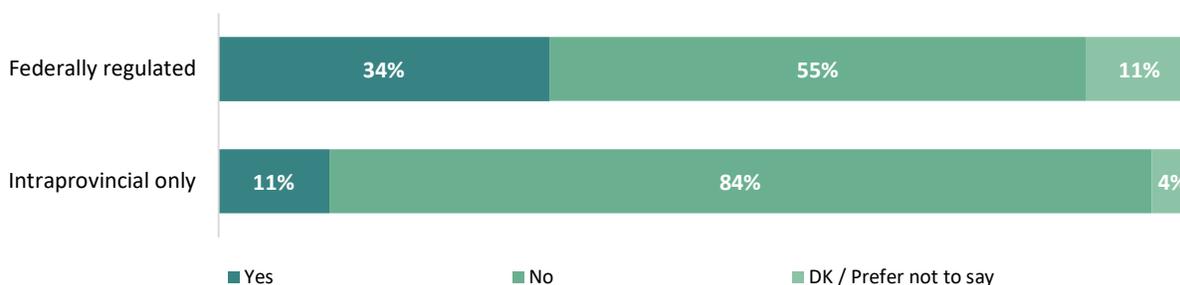
- Businesses in Quebec were more likely to cite maintaining a written preventative control plan as their biggest challenge compared to those in Ontario (22% versus 13%),
- Those in Western Canada were more likely to mention obtaining or maintaining an SFCR licence as a challenge compared to those in Atlantic Canada (12% versus 3%),
- Those in Quebec more commonly felt that implementing preventive controls was a challenge compared to those in Ontario (12% versus 2%),
- Agriculture businesses (28%) more commonly noted maintaining a written preventive control plan compared to retailers (13%) and wholesalers/distributors (11%), and,
- Large/medium sized businesses were more likely to specify that none of these actions were considered challenges compared to micro businesses (41% versus 29%).

Intraprovincial only businesses

- Agriculture businesses were more likely to indicate that maintaining traceability measures was a challenge compared to wholesalers/distributors (22% versus 7%), and,
- Processors/manufacturers were more likely to cite implementing preventive controls as a primary challenge compared to wholesalers/distributors (14% versus 3%).

Roughly a third of federally regulated businesses (34%) and 11% of intraprovincial businesses reported using a private food safety or quality control certification system.

Figure 12. Use of private certification systems



QA8. Do you use a private food safety or quality control certification system such as GFSI, ISO or QMP? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

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

Federally regulated businesses

- Processors/manufacturers compared to retailers (43% versus 25%), and,
- Large/medium sized businesses (47%) compared to small (27%) and micro businesses (19%).

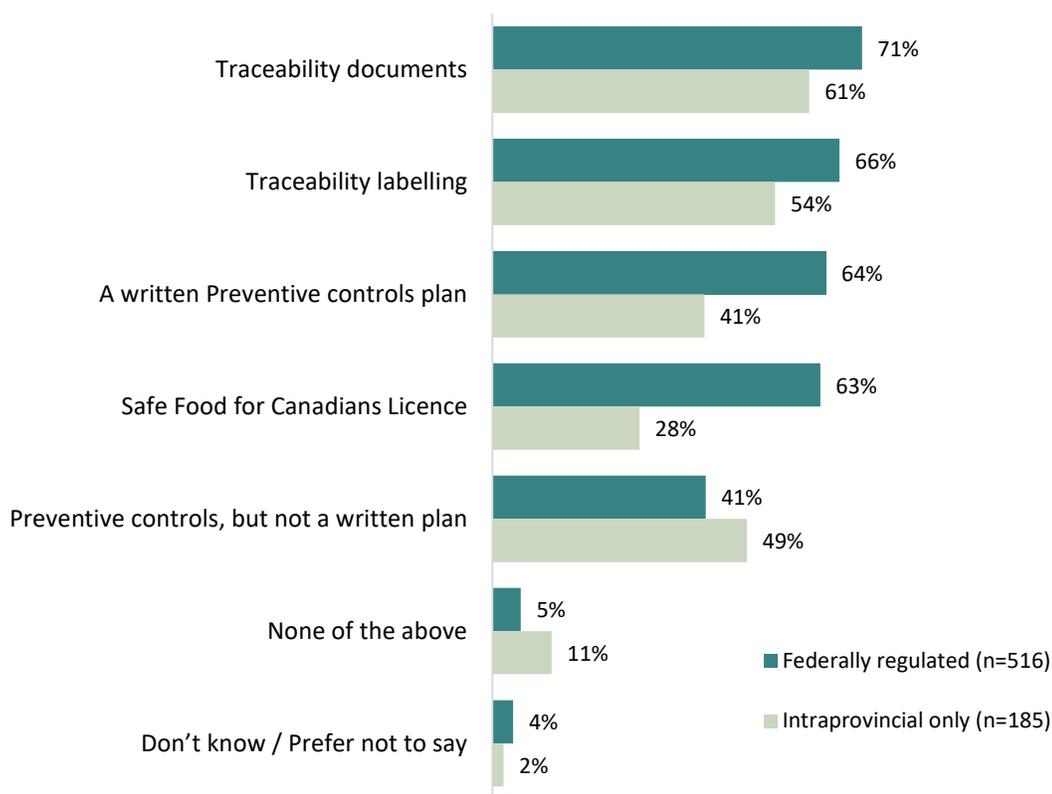
Business representatives were asked which quality control measures were currently being used by their business.

Traceability documents were most common among both segments (71% federally regulated, 61% intraprovincial only), followed by traceability labelling (66% federally regulated, 54% intraprovincial only), and a written preventive controls plan (64% federally regulated, 41% intraprovincial only).

Federally regulated businesses were more than twice as likely to have a Safe Food for Canadians Licence (63% compared to 28% among intraprovincial businesses).

Roughly half of intraprovincial businesses (49%) reported having preventive controls in place, but not a written plan (compared to 41% among federally regulated businesses).

Figure 13. Preventative control measures used by businesses



QA9. Which of the following items, if any, does your company have? [SELECT ALL THAT APPLY] Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

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

Federally regulated businesses

- Businesses in Quebec compared to those in Western Canada (70% versus 52%),
- Processors/manufacturers (75%) and wholesalers/distributors (73%) compared to retailers (50%), and,
- Large/medium sized businesses (71%) compared to small (57%) or micro businesses (53%).

Intraprovincial only businesses

- Businesses in Quebec (45%) compared to those in Western Canada (25%) and Ontario (8%),
- Wholesalers/distributors compared to agriculture businesses (39% versus 19%), and,

- Large/medium sized businesses (57%) compared to small (16%) and micro businesses (14%).

Those more likely to report that their business has a written preventive controls plan included:

Federally regulated businesses

- Businesses in Ontario compared to those in Western Canada (70% versus 58%),
- Processors/manufacturers (79%) compared to wholesalers/distributors (63%) and retailers (51%), and,
- Large/medium sized businesses (76%) compared to small (58%) or micro businesses (48%).

Intraprovincial only businesses

- Wholesalers/distributors compared to agriculture businesses (58% versus 33%), and,
- Large/medium sized businesses compared to micro businesses (54% versus 30%).

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

Federally regulated businesses

- Processors/manufacturers (82%), wholesalers/distributors (74%), and agriculture businesses (73%) compared to retailers (59%), and,
- Large/medium (80%) and small businesses (69%) compared to micro businesses (56%).

Those more likely to report that their business has traceability labelling included:

Federally regulated businesses

- Businesses in Ontario compared to those in Western Canada (72% versus 60%),
- Processors/manufacturers compared to retailers (78% versus 57%), and,
- Large/medium sized businesses (75%) compared to small (62%) or micro businesses (56%).

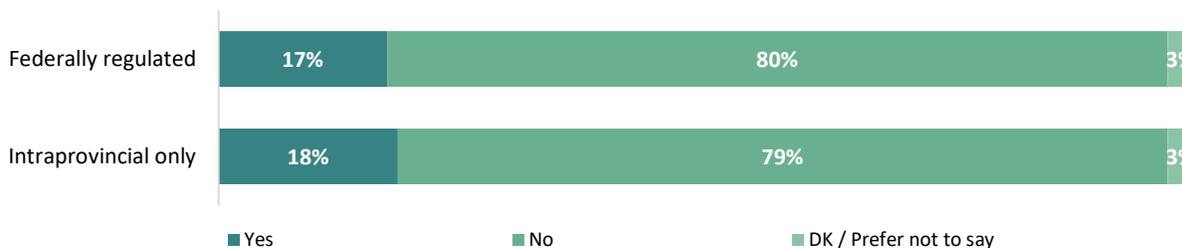
Intraprovincial only businesses

- Businesses in Atlantic Canada compared to those in Quebec (83% versus 50%), and,
- Wholesalers/distributors compared to agriculture businesses (73% versus 45%).

Listeria contamination and related policies

Representatives were asked whether their business' product could pose a risk of Listeria contamination. Across both segments, less than a fifth of representatives believed their product could pose a risk of Listeria contamination (17% federally regulated, 18% intraprovincial only).

Figure 14. Potential product risk of Listeria contamination



QA11. As far as you know, could your product pose a risk of Listeria contamination? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

Business segments more likely to have a product that poses a risk of Listeria contamination included:

Federally regulated businesses

- Processors/manufacturers compared to agriculture businesses (24% versus 9%), and,
- Large/medium sized businesses compared to micro businesses (21% versus 12%).

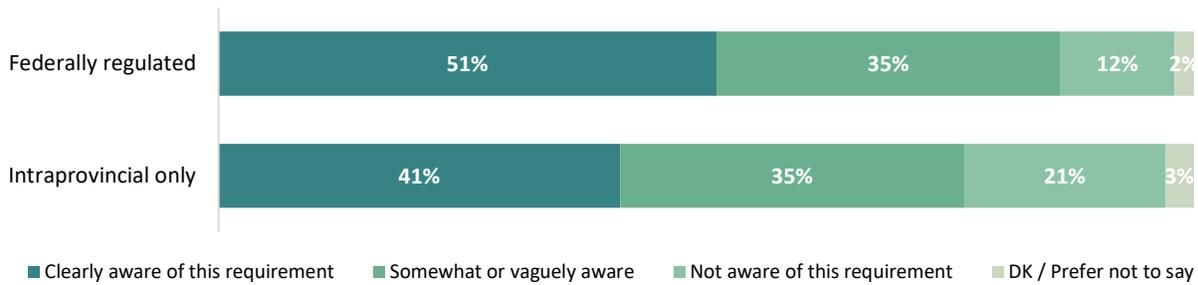
Intraprovincial only businesses

- Small businesses compared to micro businesses (27% versus 12%).

Respondents whose business' product could pose a risk of Listeria contamination were asked whether they were aware of the Health Canada Listeria policy.

Roughly half of federally regulated businesses with at-risk products (51%) were clearly aware of this policy (41% among intraprovincial businesses with at-risk products). An additional 35% in each segment were somewhat or vaguely aware of this policy, while fewer were not aware (12% federally regulated, 21% intraprovincial only).

Figure 15. Awareness of the Health Canada Listeria policy



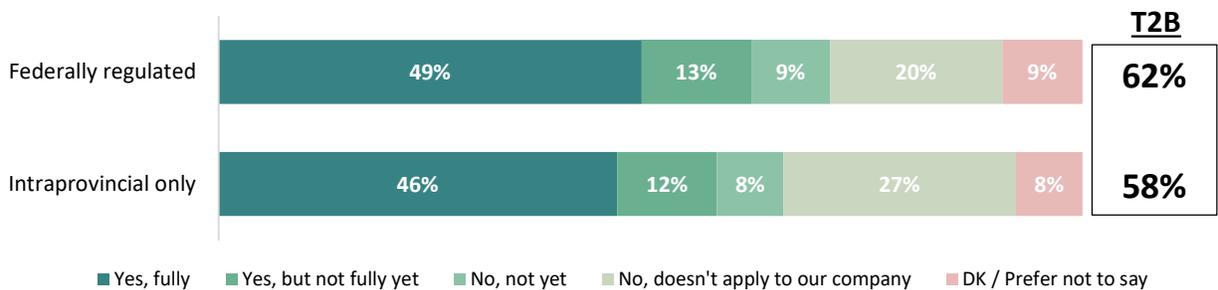
QA11A. Were you aware of the Health Canada Listeria policy? Would you say you were... Base: Businesses whose product may pose a risk of Listeria contamination, federally regulated, n=89; intraprovincial only, n=34.

Those aware of the Health Canada Listeria policy were asked whether their company had implemented the requirements of this policy.

Nearly half of businesses from each segment had fully implemented the requirements (49% federally regulated, 46% intraprovincial only), with fewer partially implementing the requirements (13% federally regulated, 12% intraprovincial only). Few businesses across both segments had not yet implemented the requirements (9% federally regulated, 8% intraprovincial only).

Many representatives specified that the requirements did not apply to their company (20% federally regulated, 27% intraprovincial only), while nearly 1 in 10 were unsure whether their business had implemented the requirements (9% federally regulated, 8% intraprovincial only).

Figure 16. Implementation of the Health Canada Listeria policy requirements



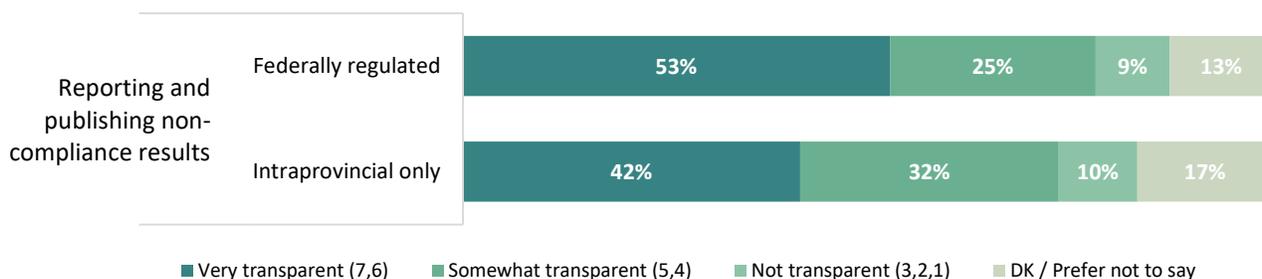
QA11B. As far as you know, has your company implemented requirements of the Health Canada Listeria policy? Base: Businesses whose product may pose a risk of Listeria contamination and were at least somewhat aware of the Health Canada Listeria policy, federally regulated, n=77; intraprovincial only, n=26.

Transparency

Respondents at least somewhat familiar with the activities of the CFIA (a score of 4 or higher) were asked to rate how transparent they believe the CFIA is when it comes to reporting and publishing non-compliance results. A 7-point scale was used with 7 representing “very transparent” and 1 representing “not at all transparent”.

More than half (53%) of federally regulated businesses felt that the CFIA was very transparent when it comes to reporting and publishing non-compliance results (42% among intraprovincial businesses). A quarter of federally regulated businesses (25%) felt that the CFIA was somewhat transparent compared to 32% of intraprovincial businesses. Fewer felt that the CFIA was not very transparent (9% federally regulated, 10% intraprovincial only) or were unsure (13% federally regulated, 17% intraprovincial only).

Figure 17. Transparency of the CFIA



QT2. In your opinion, how transparent do you think the CFIA is when it comes to reporting and publishing non-compliance results? Please answer on a scale of 1 to 7, with 1 being not at all transparent, and 7 being very transparent. Base: Businesses who are familiar with the activities of CFIA, federally regulated, n=476; intraprovincial only, n=144.

Key findings

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

Federally regulated businesses

- Large/medium sized businesses (61%) compared to small (47%) and micro businesses (42%).

Intraprovincial only businesses

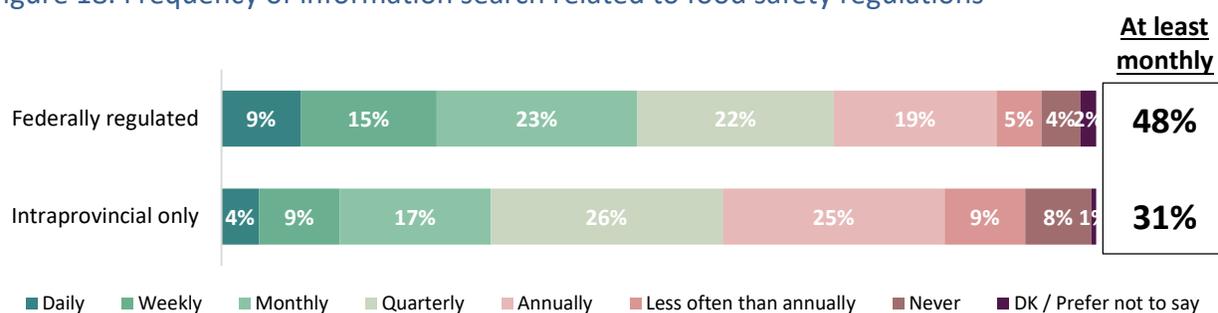
- Large/medium sized businesses compared to micro businesses (57% versus 30%).

Searching for information related to food safety regulations

When business representatives were asked how often they look for information about food safety regulations or requirements of any kind, 48% of federally regulated businesses and 31% of intraprovincial businesses did so at least monthly.

Many reported looking for this information quarterly (22% federally regulated, 26% intraprovincial only), or about once a year (19% federally regulated, 25% intraprovincial only). Fewer reported looking for this information less than annually (5% federally regulated, 9% intraprovincial only), or never (4% federally regulated, 8% intraprovincial only).

Figure 18. Frequency of information search related to food safety regulations



Q11. How often do you look for information about food safety regulations or requirements of any kind? Would you say... Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

Businesses more likely to seek out food safety regulation information on at least a monthly basis included:

Federally regulated businesses

- Businesses in Atlantic Canada compared to those in Quebec (62% versus 40%), and,
- Large/medium sized businesses (58%) compared to small (41%) or micro businesses (36%).

Intraprovincial only businesses

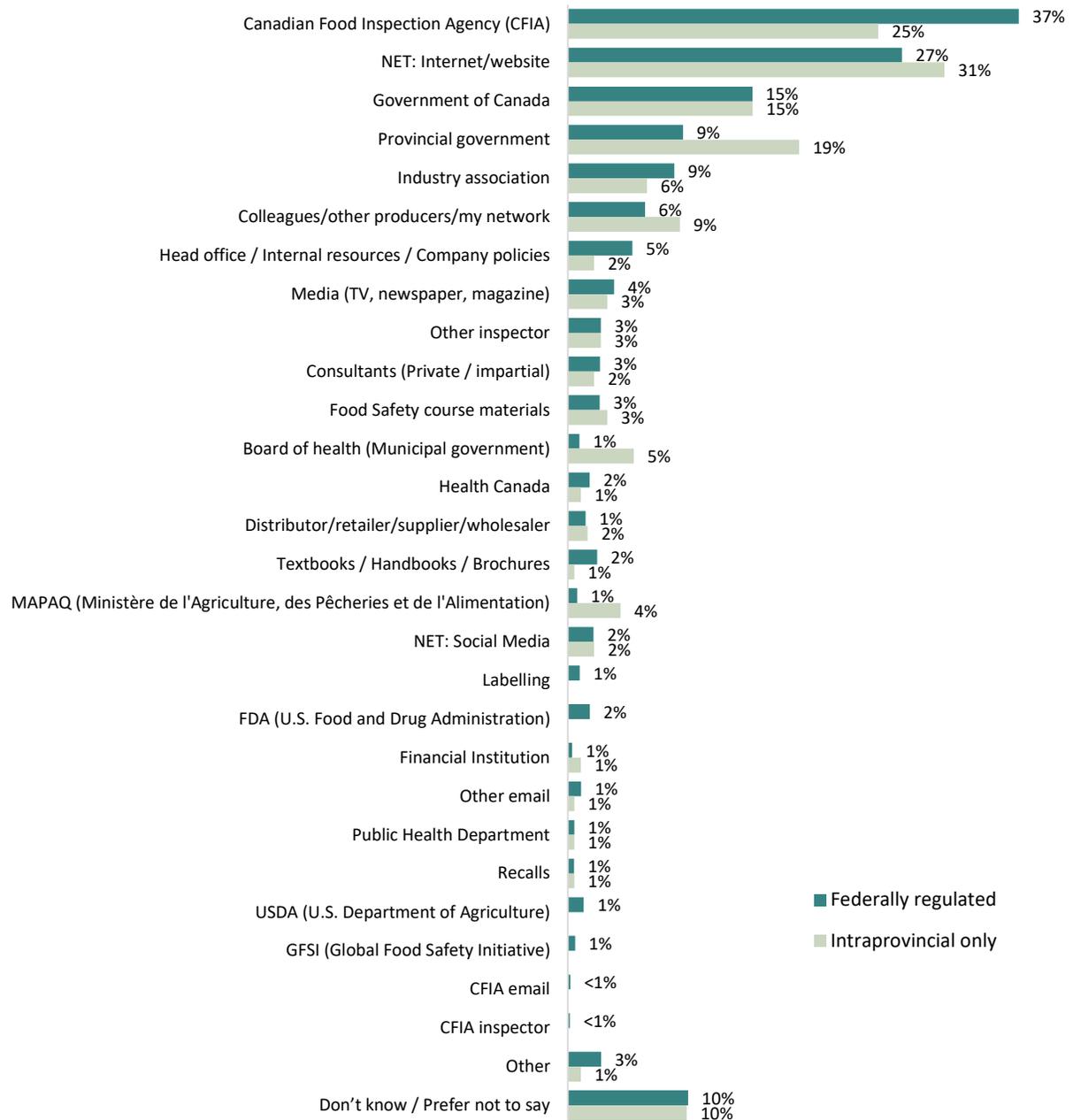
- Businesses in Ontario compared to those in Quebec (41% versus 22%), and,
- Large/medium (41%) and small businesses (44%) compared to micro businesses (17%).

When it comes to sources of information related to food safety regulations or requirements, the CFIA was cited most often by federally regulated businesses (37%, compared to 25% among intraprovincial businesses), while the internet in general was the primary source for intraprovincial businesses (31%, compared to 27% among federally regulated businesses).

The Government of Canada in general was commonly cited as an information source across both audiences (15%, respectively), while intraprovincial businesses were more than twice as likely to mention the provincial government (19%, compared to 9% among federally regulated businesses).

Additional common sources included industry associations (9% federally regulated, 6% intraprovincial only), colleagues (6% federally regulated, 9% intraprovincial only), and various internal resources (5% federally regulated, 2% intraprovincial only), among others.

Figure 19. Sources of information for food safety regulations



Q13. What sources or types of information about food safety regulations do you go to or have you used in the past? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

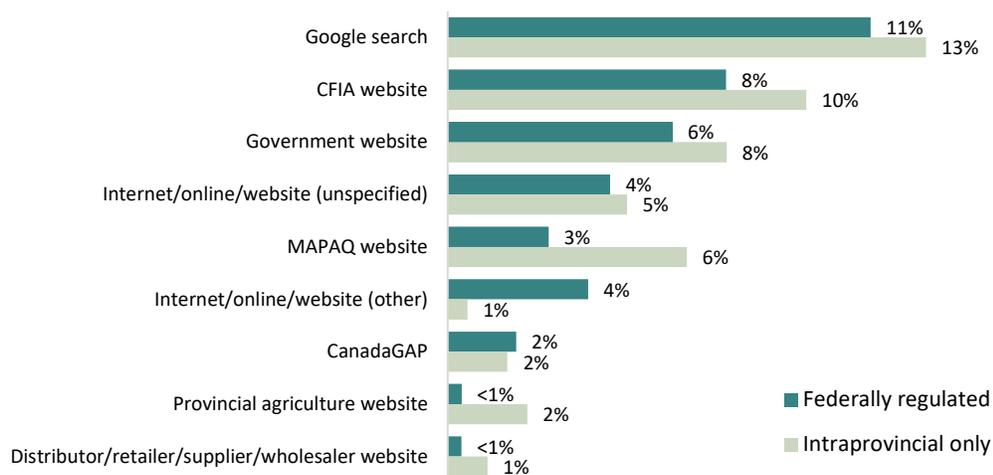
Across sub-segments, businesses more likely to have previously used CFIA as a source for food safety regulations included:

Federally regulated businesses

- Wholesalers/distributors (54%) and processors/manufacturers (53%) compared to agriculture businesses (33%) and retailers (18%), and,
- Large/medium sized businesses (43%) compared to small (30%) and micro businesses (32%).

The primary online sources mentioned by business representatives included a generic Google search (11% federally regulated, 13% intraprovincial only), the CFIA website (8% federally regulated, 10% intraprovincial only), government websites (6% federally regulated, 8% intraprovincial only), and the MAPAQ website (3% federally regulated, 6% intraprovincial only), among other specific sources mentioned.

Figure 20. Internet sources of information for food safety regulations

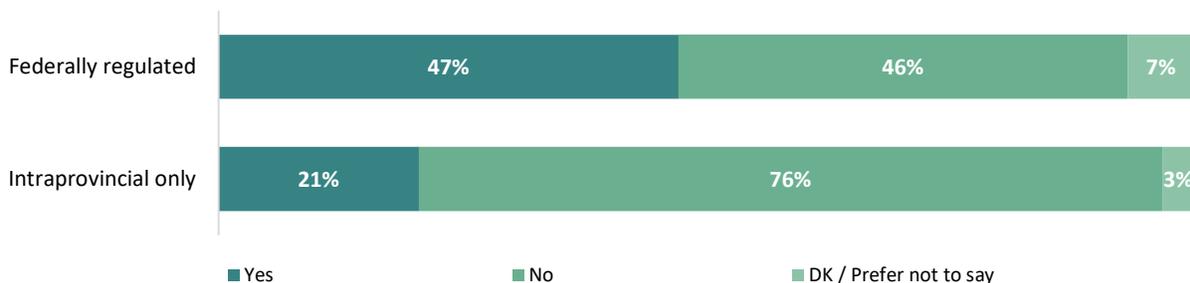


Q13. What sources or types of information about food safety regulations do you go to or have you used in the past? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

CFIA communications

Business representatives were asked whether they had received any information from the CFIA within the past year. Nearly half of federally regulated businesses (47%) recalled receiving information from the CFIA, more than twice as many among intraprovincial representatives (21%).

Figure 21. Receiving information from CFIA in the past year



Q14A. Have you received any information from the CFIA in the past year? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

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

Federally regulated businesses

- Businesses in Ontario (53%) and Quebec (52%) compared to those in Western Canada (35%),
- Processors/manufacturers (61%), wholesalers/distributors (56%), and agriculture businesses (51%) compared to retailers (29%), and,
- Large/medium sized businesses (58%) compared to small (39%) or micro businesses (36%).

Intraprovincial only businesses

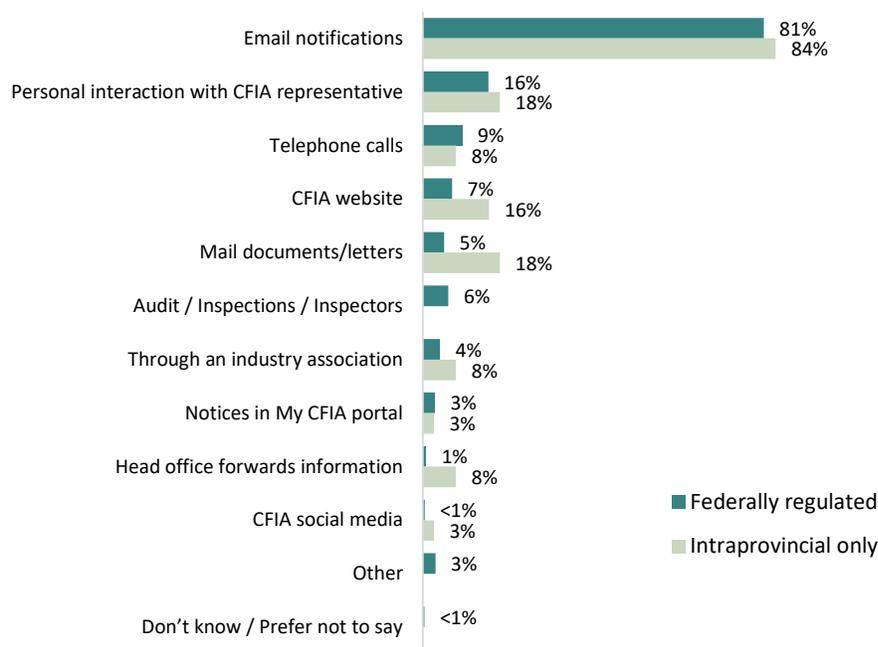
- Large/medium (35%) and small businesses (24%) compared to micro businesses (10%).

Those who had received information from the CFIA within the past year were asked how they received this information. Most respondents reported receiving email notifications from the CFIA (81% federally regulated, 84% intraprovincial only).

Other sources included personal interaction with a CFIA representative (16% federally regulated, 18% intraprovincial only), telephone calls (9% federally regulated, 8% intraprovincial only), the CFIA website (7% federally regulated, 16% intraprovincial only), mailed documents (5% federally regulated, 18% intraprovincial only), or through an audit or CFIA inspection (6% federally regulated).

Fewer cited an industry association (4% federally regulated, 8% intraprovincial only), notices in the MyCFIA portal (3% federally regulated, 3% intraprovincial only), information forwarded from head office (1% federally regulated, 8% intraprovincial only), or through CFIA’s social media (<1% federally regulated, 3% intraprovincial only).

Figure 22. How information from CFIA was received



Q14B. How has your business received information from the CFIA in the past year? Base: Businesses that received information from the CFIA in the past year, federally regulated, n=244; intraprovincial only, n=38.

Key findings

Federally regulated businesses

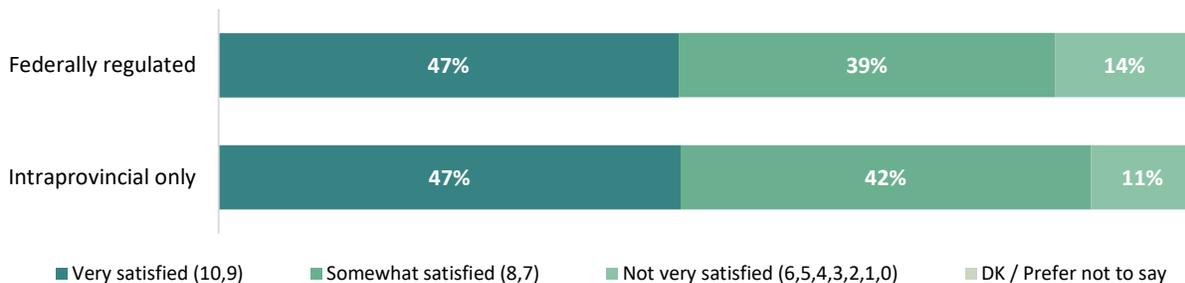
- Businesses in Quebec (89%), Western Canada (83%), and Ontario (80%) were more likely to report receiving email notifications compared to those in Atlantic Canada (48%),
- Small businesses were more likely to have received information through email notifications compared to micro businesses (91% versus 75%), and,

- Processors/manufacturers were more likely to have received information from the CFIA through personal interaction with a CFIA representative compared to wholesalers/distributors (23% versus 9%).

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

Results were nearly identical across both segments, with nearly half of representatives reporting high satisfaction with CFIA communications (scores of 9 or 10; 47%, respectively). Slightly fewer reported moderate satisfaction (scores of 7 or 8; 39% federally regulated, 42% intraprovincial only), while fewer were not very satisfied (scores of 6 or lower; 14% federally regulated, 11% intraprovincial only).

Figure 23. Satisfaction with communications received from CFIA



Q15. Overall, how satisfied are you with the communications you have received from CFIA? Please use a number between 0 and 10, where 0 means “not at all satisfied” and 10 means “very satisfied”. Base: Businesses that received information from the CFIA in the past year, federally regulated, n=244; intraprovincial only, n=38.

Key findings

Federally regulated businesses

- Wholesalers/distributors were more likely to report being very satisfied with CFIA communications compared to agriculture businesses (56% versus 30%), and,
- Large/medium (51%) and micro businesses (51%) were more likely to report being very satisfied with CFIA communications compared to small businesses (30%).

Respondents were then asked to provide a reason for their satisfaction rating. Results in the report are limited to federally regulated businesses (n=240) given the small sample size for intraprovincial only businesses (n=38).

Those who provided a high satisfaction score (9 or 10) most frequently cited: no issues with communication and felt well-informed (47%), clear information (26%), responsive staff (26%), and timely updates (16%).

Among those who provided a moderate satisfaction score (7 or 8), reasoning included a mix of positive feedback and areas for improvement. These respondents most often cited no issues with communications (18%), vague communications (18%), room for improvement (14%), previous communication issues or lack of information (12%), and slow responses (12%).

Those who provided lower satisfaction scores (6 or below) most often referred to vague communications (28%), previous communication issues or lack of information (27%), a lack of proactive communications (19%), and slow responses (10%).

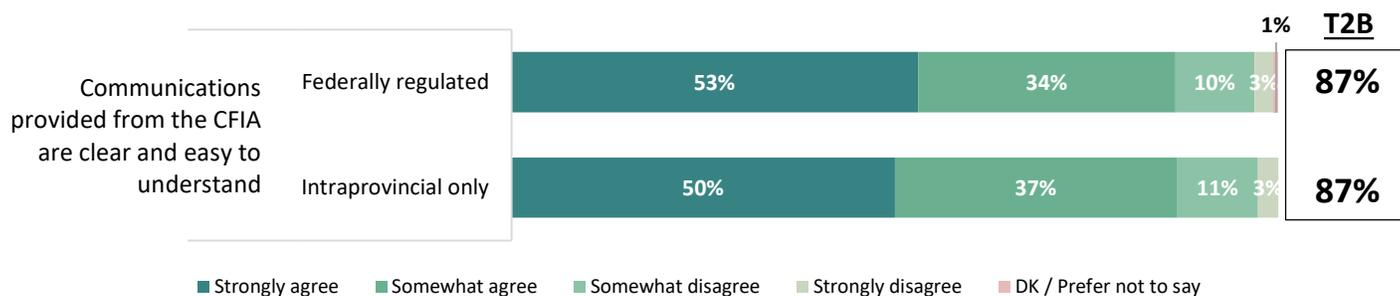
Figure 24. Reasons for satisfaction rating with communications received from CFIA – federally regulated businesses

Among very satisfied businesses (satisfaction rating of 10,9)	(n=117)	Among somewhat satisfied businesses (satisfaction rating of 8,7)	(n=86)	Among dissatisfied businesses (satisfaction rating of 6,5,4,3,2,1,0)	(n=37)
Satisfied/no issues with communications/well-informed	47%	Satisfied/no issues with communications/well-informed	18%	Communications are not clear/vague	28%
Clear information	26%	Communications are not clear/vague	18%	Dissatisfied/experienced communications issues/not well-informed	27%
Responsive staff	26%	There is always room for improvement	14%	Communications are not proactive	19%
Timely updates	16%	Dissatisfied/experienced communications issues/not well-informed	12%	Staff is slow to respond	10%
Communications are not clear/vague	2%	Staff is slow to respond	12%	Clear information	5%
Accessible communications	2%	Communications are not proactive	9%	Communications are not direct	5%
There is always room for improvement	1%	Timely updates	7%	Website/difficult to navigate	4%
Dissatisfied/experienced communications issues/not well-informed	1%	Clear information	6%	Satisfied/no issues with communications/well-informed	3%
Information not received in a timely manner	1%	Responsive staff	5%	Responsive staff	3%
Staff is slow to respond	1%	Website/difficult to navigate	5%	Other	20%
Don't know/Prefer not to say	4%	Communications are not direct	2%	Don't know/Prefer not to say	4%
		Information not received in a timely manner	2%		
		Other	11%		
		Don't know/Prefer not to say	8%		

I6. Why do you give CFIA a rating of [PIPE RESPONSE FROM I5] out of 10 for its communications with you? Base: Federally regulated businesses that received information from the CFIA in the past year and provided a valid satisfaction rating, n=240.

Most business representatives who had received information from the CFIA in the past year agreed that communications from the CFIA are clear and easy to understand (87% among both federally regulated and intraprovincial businesses). Roughly half of respondents strongly agreed with this sentiment (53% federally regulated, 50% intraprovincial only).

Figure 25. Impressions of CFIA communications



Q18. To what extent do you agree or disagree that communications provided from CFIA are clear and easy to understand? Do you... Base: Businesses that received information from the CFIA in the past year, federally regulated, n=244; intraprovincial only, n=38.

Key findings

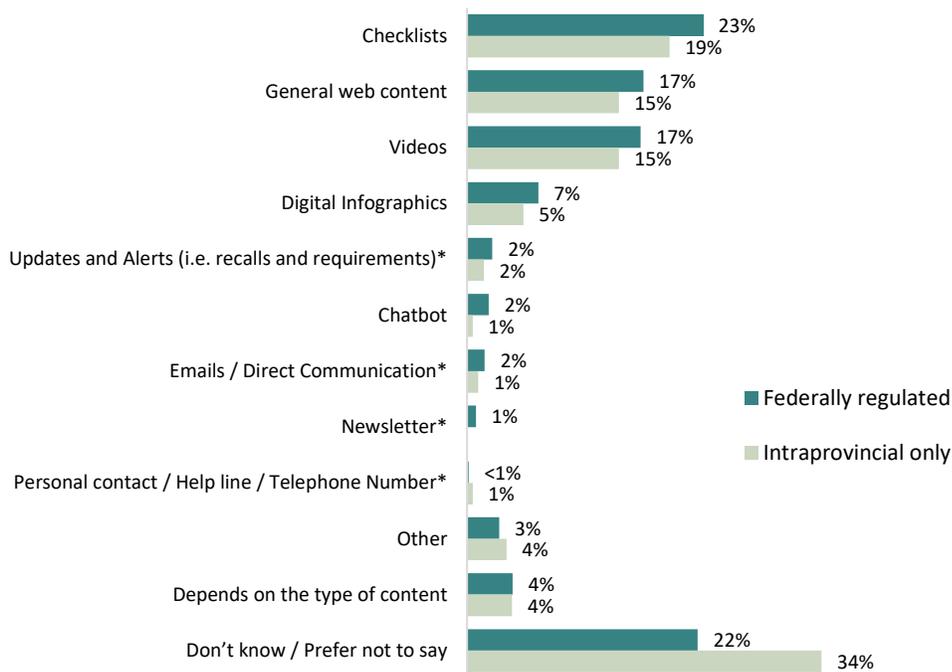
Federally regulated businesses

- Wholesalers/distributors were more likely to strongly agree that communications provided from CFIA are clear and easy to understand compared to agriculture businesses (63% versus 38%).

When asked to select the types of information products they would most like to receive from CFIA, results were quite mixed across both audiences. The most appealing types of products, irrespective of business segment, were checklists (23% federally regulated, 19% intraprovincial only), general web content (17% federally regulated, 15% intraprovincial only), and videos (17% federally regulated, 15% intraprovincial only).

Many respondents were unsure or did not provide their preference (22% federally regulated, 34% intraprovincial only).

Figure 26. Preferred types information products



Q19B. Is there a particular information product you would most prefer to receive from the CFIA? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185. *Option was not listed to respondents.

Key findings

Across sub-segments, preferences for information products from CFIA included:

Federally regulated businesses

- Businesses in Western Canada were more likely to prefer videos compared to those in Ontario (22% versus 12%),
- Those in Ontario (10%) and Western Canada (9%) were more likely to prefer digital infographics compared to those in Quebec (3%), and,
- Agriculture businesses were more likely to prefer videos compared to wholesalers/distributors (24% versus 10%).

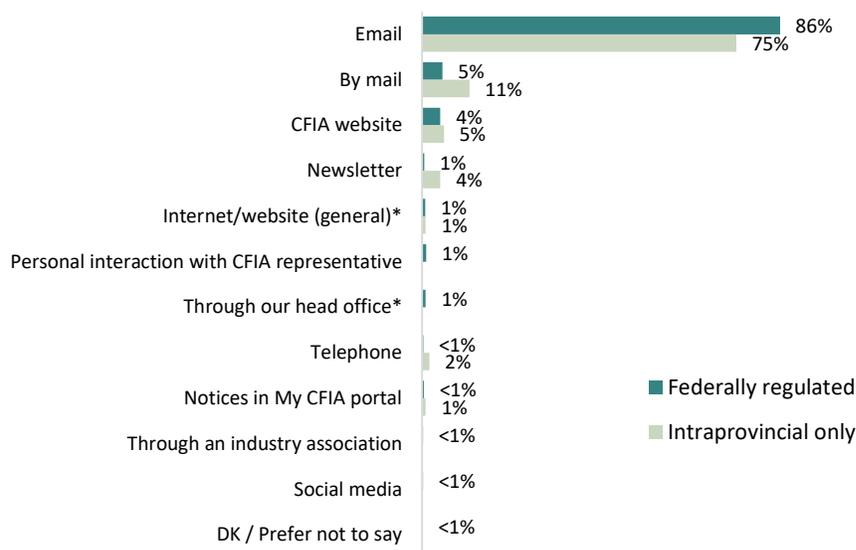
Intraprovincial only businesses

- Businesses in Ontario (53%) were more likely to prefer checklists compared to those in Quebec (14%) and Western Canada (10%), and,
- Those in Western Canada (28%) were more likely to prefer videos compared to those in Quebec (12%) and Ontario (8%).

Business representatives who were interested in a particular information product were asked about preferred channels of communication for receiving these types of information products from the CFIA.

Email was by far the most preferred channel for communication from the CFIA (86% federally regulated, 75% intraprovincial only), followed by mail (5% federally regulated, 11% intraprovincial only), and the CFIA website (4% federally regulated, 5% intraprovincial only).

Figure 27. Preferred CFIA information channels



Q19A. How would you most prefer to receive that information from the CFIA? Base: Businesses interested in receiving information products from CFIA, federally regulated, n=365; intraprovincial only, n=114. *Option was not listed to respondents.

Key findings

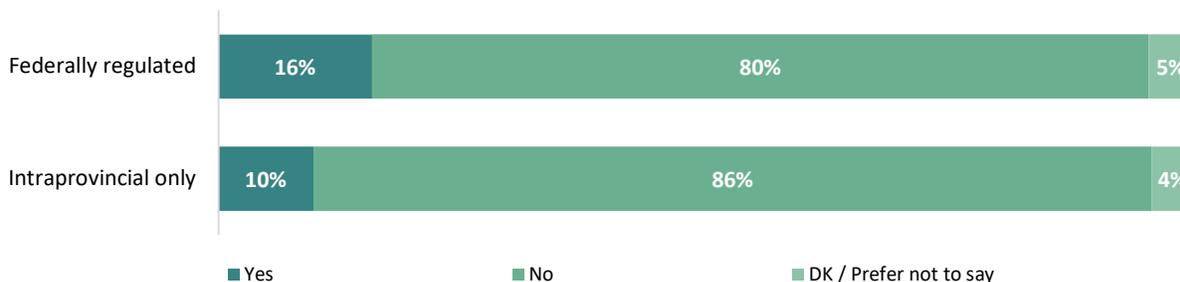
Across sub-segments, preferences for communications channels included:

Federally regulated businesses

- Businesses in Quebec (95%) were more likely to prefer email compared to those in Ontario (82%) and Western Canada (81%),
- Those in Western Canada (10%) were more likely to prefer information to be available on the CFIA website compared to those in Ontario (3%) and Quebec (1%),
- Agriculture businesses (94%), processors/manufacturers (89%) and wholesalers/distributors (89%) were more likely to prefer email compared to retailers (76%), and,
- Conversely, retailers (11%) were more likely to prefer physical mail compared to wholesalers/distributors (3%), processors/manufacturers (2%) and agriculture businesses (0%)

When business representatives were asked whether they have had difficulty getting the information they needed from the CFIA over the past few years, 16% of federally regulated businesses reported difficulties (10% among intraprovincial businesses). Most representatives did not experience any difficulties accessing information (80% federally regulated, 86% intraprovincial only).

Figure 28. Difficulty accessing information from CFIA



Q12. Over the past few years, have you had difficulty getting information you needed from CFIA? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

Businesses more likely to have reported difficulty getting information from CFIA included:

Federally regulated businesses

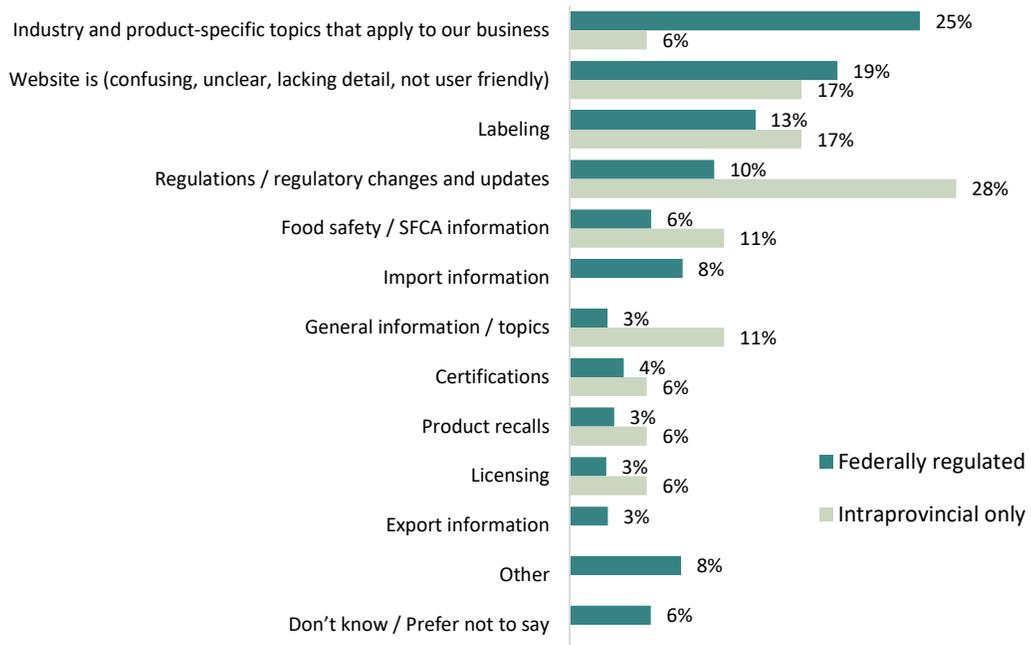
- Businesses in Quebec compared to those in Atlantic Canada (20% versus 8%), and,
- Agriculture businesses (24%), wholesalers/distributors (20%), and processors/manufacturers (18%) compared to retailers (7%)

Those who reported experiencing difficulties getting information from the CFIA (n=81 federally regulated businesses, n=18 intraprovincial businesses) were asked to list which topics they had difficulty getting information on.

Federally regulated businesses were most likely to have experienced issues accessing industry and product-specific topics (25% compared to 6% among intraprovincial businesses). Intraprovincial representatives were more likely to cite topics related to regulations or regulatory changes (28% compared to 10% among federally regulated businesses).

Additional topics included confusion surrounding the website (19% federally regulated, 17% intraprovincial only), labelling (13% federally regulated, 17% intraprovincial only), and food safety information (6% federally regulated, 11% intraprovincial only), among others.

Figure 29. Specific topics on which businesses had difficulty getting information from the CFIA

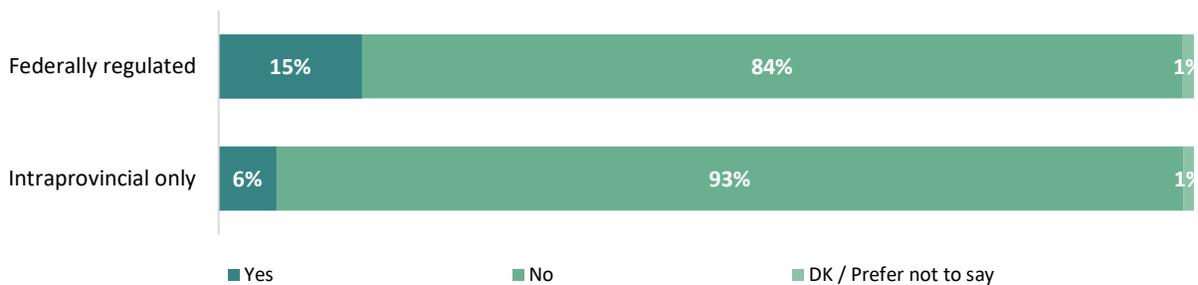


Q13. What specific topics did you have difficulty getting information on? Businesses that reported difficulty getting information from CFIA, federally regulated, n=81; intraprovincial only, n=18.

Ask CFIA

Nearly three times as many federally regulated business representatives reported having used the Ask CFIA service when compared to intraprovincial businesses (15% compared to 6%).

Figure 30. Usage of “Ask CFIA”



QC4. Have you used the Ask CFIA service? Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

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

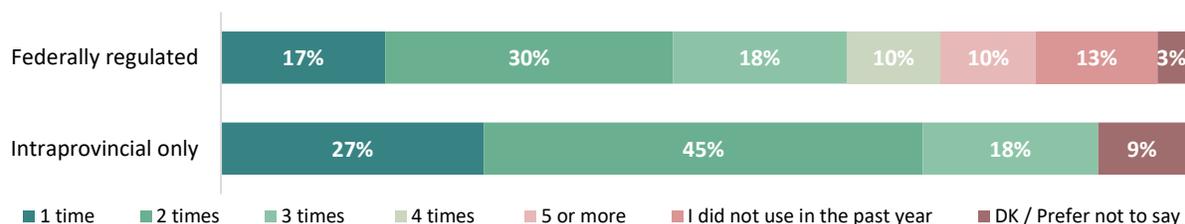
Federally regulated businesses

- Businesses in Quebec compared to those in Western Canada (18% versus 9%),
- Wholesalers/distributors (24%) and processors/manufacturers (19%) compared to retailers (8%), and,
- Small businesses compared to medium/large businesses (21% versus 11%).

Those who had used the Ask CFIA service in the past (n=80 federally regulated businesses, n=11 intraprovincial businesses) were asked how many times they had used the service in the past year.

Several representatives had used the service just once (17% federally regulated, 27% intraprovincial only), while most used the service twice in the past year (30% federally regulated, 45% intraprovincial only). An identical proportion used the service three times (18%, respectively), while only federally regulated businesses had used it four times (10%), or 5 or more times (10%). Among federally regulated businesses, 13% reported no use of the service within the past year.

Figure 31. Number of times “Ask CFIA” service was used in the past year

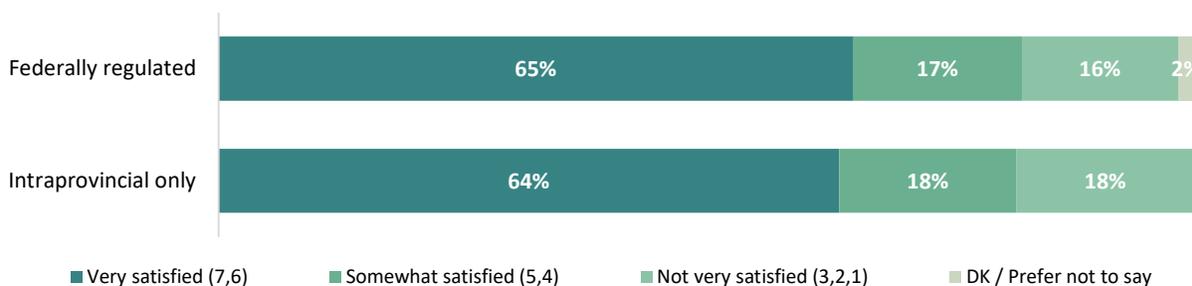


QC5. In the last year, how many times have you used the Ask CFIA service? Base: Businesses that have used the Ask CFIA service, federally regulated, n=80; intraprovincial only, n=11.

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

Nearly two-thirds of respondents (65% federally regulated, 64% intraprovincial only) reported high satisfaction (scores of 6 or 7) and roughly a fifth (17% federally regulated, 18% intraprovincial only) reported moderate (scores of 4 or 5), or low satisfaction (scores of 1, 2 or 3) (16% federally regulated, 18% intraprovincial only).

Figure 32. Overall satisfaction with “Ask CFIA” service



QC7. Rate your overall level of satisfaction with the Ask CFIA service. Please use a scale of 1 to 7, where 1 means “not at all satisfied” and 7 means “very satisfied”. Base: Businesses that have used the Ask CFIA service, federally regulated, n=80; intraprovincial only, n=11.

Those who provided a satisfaction rating for the Ask CFIA service were asked to provide the reason behind their rating. Results in the report are limited to federally regulated businesses (n=79) given the small sample size for intraprovincial only businesses (n=11).

Those most satisfied with the service tended to refer to clear and helpful responses (34%), general satisfaction with the service (34%) and getting a fast response (11%).

On the other hand, those who gave lower satisfaction scores most commonly referred to delayed service/slow responses (57%), and unclear/unhelpful responses (37%).

Figure 33. Reasons for “Ask CFIA” ratings – federally regulated businesses

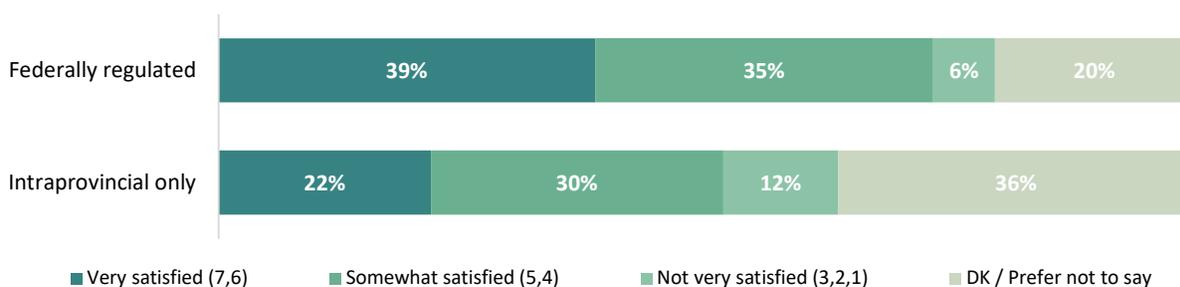
Reasons provided	Total (n=79)	Among users with low to moderate satisfaction	Among very satisfied users
		(n=27) (satisfaction of rating of 5,4,3,2,1)	(n=52) (satisfaction rating of 7,6)
Clear response / provided helpful information	24%	6%	34%
Delayed service / slow response	24%	57%	7%
Satisfied with service / good service (general)	24%	4%	34%
Unclear response / unhelpful information	14%	37%	2%
Fast response / responsive service	7%	-	11%
Dissatisfied with service / poor service (general)	6%	14%	2%
Easy to access / user-friendly service	4%	-	7%
Difficult to use / navigate service	1%	-	1%
Other	9%	3%	12%
Don't know / Prefer not to say	8%	4%	9%

QC8. Why did you give the Ask CFIA service a rating of [PIPE RESPONSE FROM C7] for overall satisfaction? Base: Federally regulated businesses that have used the Ask CFIA service and provided a valid satisfaction rating, n=79.

Businesses were asked to rate their overall satisfaction with changes the CFIA has made to digital services since the start of the COVID pandemic. A 7-point scale was used with 7 representing “very satisfied” and 1 representing “not at all satisfied”.

Nearly one in five federally regulated businesses (39%) reported high satisfaction (scores of 6 or 7) compared to 22% of intraprovincial businesses. Roughly a third of respondents (35% federally regulated, 30% intraprovincial only) reported moderate satisfaction (scores of 4 or 5). Many businesses chose not to provide a rating.

Figure 34. Overall satisfaction with CFIA digital services



QC9. Since the start of the COVID pandemic the CFIA has moved to improve digital services, overall how satisfied are you with the changes to digital services? Please use a scale of 1 to 7, where 1 means “not at all satisfied” and 7 means “very satisfied”. Base: All respondents, federally regulated, n=516; intraprovincial only, n=185.

Key findings

Federally regulated businesses

- Processors/manufacturers were more likely to be very satisfied with the changes to digital services compared to wholesalers/distributors (20% versus 6%),
- Agriculture businesses were more likely to be unsure of the changes to digital services compared to processors/manufacturers (47% versus 28%), and,
- Businesses in Quebec (48%) were more likely to be unsure compared to those in Ontario (30%) and Western Canada (24%).

Methodology

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

The research methodology involved two phases of research:

- Phase 1: Online focus groups with representatives of Canadian food businesses
- Phase 2: A national telephone survey with representatives of Canadian food businesses

Qualitative research

The qualitative research consisted of six online focus groups with representatives of food businesses in Canada across the country. The business focus groups were conducted between November 12 and November 26, 2024.

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

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

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

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

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

- No participant (nor anyone in their immediate family or household) may work in an occupation that has anything to do with the research topic area, in related government departments/agencies, nor in advertising, marketing research, public relations or the media (radio, television, newspaper, film/video production, etc.).

- No participants acquainted with each other may be knowingly recruited for the same study, unless they are in different sessions that are scheduled separately.
- No participants may be recruited who have attended a qualitative research session within the past 6 months.
- No participant may be recruited who has attended 5 or more qualitative research sessions in the past 5 years.
- No participant should be recruited who has attended, in the past 2 years, a qualitative research session on the same general topic as defined by the researcher/moderator.

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

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

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

- All recruitment was conducted in the participant’s official language of choice, English and French, as appropriate.
- Upon request, participants were informed on how they can access the research findings.
- Upon request, participants were provided with Quorus’ privacy policy.
- Recruitment confirmed each participant had the ability to speak, understand, read and write in the language in which the session was to be conducted.
- Participants were informed of their rights under the *Privacy and Access to Information Acts* and ensured those rights were protected throughout the research process. This included: informing participants of the purpose of the research, identifying both the sponsoring department or agency and research supplier, informing participants the study will be made available to the public 6 months after field completion through Library and Archives Canada, and informing participants that their participation in the study is voluntary and the information provided will be administered according to the requirements of the *Privacy Act*.

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

A total of six online focus groups were conducted with representatives from food businesses. A total of 33 individuals participated in the groups. The schedule of the focus groups is as follows:

Figure 35 – Focus group schedule

Location	Language	Date (2024)	Participants
Atlantic Canada	English	November 12	4
Prairies (MB/SK/AB/NWT)	English	November 14	6
Ontario/Nunavut	English	November 18	6
Quebec	English	November 25	6
Quebec	French	November 25	6
British Columbia/Yukon	English	November 26	5
			Total: 33

Quantitative research

Overview

The quantitative research consisted of a national telephone food business survey. The food business survey consisted of 701 completions with businesses in the food industry in Canada from December 4, 2024 to February 19, 2025.

Questionnaire Design

The questions utilized in this study were provided by CFIA. Quorus reviewed the questions, providing suggestions and preparing them in a format suitable for data collection. As required by Government of Canada standards, English and French pre-test surveys were conducted (more details related to the pre-tests are provided further in this methodology section).

Sampling

The survey consisted of a national telephone survey with businesses in the food industry in Canada based on a selected list of North American Industry Classification System (NAICS) codes approved by CFIA.

The sampling was designed to be administered to a random sample of 701 industry representatives. Specifically:

- Employees responsible for regulatory compliance from small, medium, and large-sized food businesses
- Food importers
- Food import brokers
- Food exporters
- Employees responsible for regulatory compliance from businesses in the manufactured food sector
- Representation from all provinces and territories in Canada.

The sample frames were selected from a list of businesses from InfoCanada, a common and reputable list provider in the industry. The list of NAICS codes used are listed below.

Figure 36. NAICS codes

TARGETED INDUSTRIES WITH NAICS CODES			
AGRICULTURE, FORESTRY, FISHING AND HUNTING			
11121101	Potato Farming	11133402	Berry (except Strawberry) Farming
11121901	Other Vegetable (except Potato) & Melon Farming	11133902	Other Noncitrus Fruit Farming
11133101	Apple Orchards	11141101	Mushroom Production
11133103	Apple Orchards	11141902	Other Food Crops Grown Under Cover
11133104	Apple Orchards		
MANUFACTURING			
31121102	Flour Milling	31161301	Rendering & Meat Byproduct Processing
31121106	Flour Milling	31161302	Rendering & Meat Byproduct Processing
31121107	Flour Milling	31161501	Poultry Processing
311212	Rice Milling	31171001	Seafood Product Preparation & Packaging
31121301	Malt Manufacturing	31171003	Seafood Product Preparation & Packaging
311211	Wet Corn Milling and Starch Manufacturing	31171004	Seafood Product Preparation & Packaging
31122402	Soybean & Other Oilseed Processing	31171007	Seafood Product Preparation & Packaging
31122501	Fats & Oils Refining & Blending	31171008	Seafood Product Preparation & Packaging
31122505	Fats & Oils Refining & Blending	31181202	Commercial Bakeries
31122508	Fats & Oils Refining & Blending	311813	Frozen Cakes, Pies, and Other Pastries Manufacturing
31122511	Fats & Oils Refining & Blending	31182101	Cookie & Cracker Manufacturing
31122512	Fats & Oils Refining & Blending	31182403	Dry Pasta, Dough, & Flour Mixes Manufacturing from Purchased Flour
31122516	Fats & Oils Refining & Blending	31182404	Dry Pasta, Dough, & Flour Mixes Manufacturing from Purchased Flour
31123001	Breakfast Cereal Manufacturing	311830	Tortilla Manufacturing
311313	Beet Sugar Manufacturing	31191102	Roasted Nuts & Peanut Butter Manufacturing
31131401	Cane Sugar Manufacturing	31191901	Other Snack Food Manufacturing
31131403	Cane Sugar Manufacturing	31191905	Other Snack Food Manufacturing
311340	Nonchocolate Confectionary Manufacturing	31191906	Other Snack Food Manufacturing
31135101	Chocolate & Confectionary Manufacturing from Cacao Beans	31192001	Coffee & Tea Manufacturing
31135201	Confectionery Manufacturing from Purchased Chocolate	31192002	Coffee & Tea Manufacturing
31141102	Frozen Fruit, Juice, & Vegetable Manufacturing	311930	Flavouring Syrup and Concentrate Manufacturing
31141202	Frozen Specialty Food Manufacturing	31194101	Mayonnaise, Dressing, & Other Prepared Sauce Manufacturing
31141203	Frozen Specialty Food Manufacturing	31194103	Mayonnaise, Dressing, & Other Prepared Sauce Manufacturing
31141204	Frozen Specialty Food Manufacturing	31194202	Spice & Extract Manufacturing
31142101	Fruit & Vegetable Canning	31194203	Spice & Extract Manufacturing
31142103	Fruit & Vegetable Canning	311991	Perishable Prepared Food Manufacturing
31142104	Fruit & Vegetable Canning	31199901	All Other Miscellaneous Food Manufacturing

31142106	Fruit & Vegetable Canning	31199902	All Other Miscellaneous Food Manufacturing
31142107	Fruit & Vegetable Canning	31199905	All Other Miscellaneous Food Manufacturing
31142303	Dried & Dehydrated Food Manufacturing	31199906	All Other Miscellaneous Food Manufacturing
31151201	Creamery Butter Manufacturing	31199908	All Other Miscellaneous Food Manufacturing
31151301	Cheese Manufacturing	31199910	All Other Miscellaneous Food Manufacturing
31151402	Dry, Condensed, & Evaporated Dairy Product Manufacturing	31199913	All Other Miscellaneous Food Manufacturing
31152001	Ice Cream & Frozen Dessert Manufacturing	31199917	All Other Miscellaneous Food Manufacturing
31161101	Animal (except Poultry) Slaughtering	31199919	All Other Miscellaneous Food Manufacturing
31161102	Animal (except Poultry) Slaughtering	31199920	All Other Miscellaneous Food Manufacturing
31161103	Animal (except Poultry) Slaughtering	31211101	Soft Drink Manufacturing
31161104	Animal (except Poultry) Slaughtering	31211102	Soft Drink Manufacturing
31161202	Meat Processed from Carcasses	31211103	Soft Drink Manufacturing
31161205	Meat Processed from Carcasses	312112	Bottled Water Manufacturing
31161207	Meat Processed from Carcasses	312113	Ice Manufacturing
WHOLESALE TRADE			
42441003	General Line Grocery Merchant Wholesalers	42449010	Other Grocery & Related Products Merchant Wholesalers
42441004	General Line Grocery Merchant Wholesalers	42449011	Other Grocery & Related Products Merchant Wholesalers
42441005	General Line Grocery Merchant Wholesalers	42449013	Other Grocery & Related Products Merchant Wholesalers
42442001	Packaged Frozen Food Merchant Wholesalers	42449015	Other Grocery & Related Products Merchant Wholesalers
42442002	Packaged Frozen Food Merchant Wholesalers	42449017	Other Grocery & Related Products Merchant Wholesalers
42442003	Packaged Frozen Food Merchant Wholesalers	42449018	Other Grocery & Related Products Merchant Wholesalers
42442004	Packaged Frozen Food Merchant Wholesalers	42449019	Other Grocery & Related Products Merchant Wholesalers
42442005	Packaged Frozen Food Merchant Wholesalers	42449022	Other Grocery & Related Products Merchant Wholesalers
42442006	Packaged Frozen Food Merchant Wholesalers	42449024	Other Grocery & Related Products Merchant Wholesalers
42442007	Packaged Frozen Food Merchant Wholesalers	42449026	Other Grocery & Related Products Merchant Wholesalers
42443009	Dairy Product (except Dried or Canned) Merchant Wholesalers	42449027	Other Grocery & Related Products Merchant Wholesalers
42443010	Dairy Product (except Dried or Canned) Merchant Wholesalers	42449030	Other Grocery & Related Products Merchant Wholesalers
42443012	Dairy Product (except Dried or Canned) Merchant Wholesalers	42449032	Other Grocery & Related Products Merchant Wholesalers
42443013	Dairy Product (except Dried or Canned) Merchant Wholesalers	42449033	Other Grocery & Related Products Merchant Wholesalers
42444001	Poultry & Poultry Product Merchant Wholesalers	42449034	Other Grocery & Related Products Merchant Wholesalers
42444002	Poultry & Poultry Product Merchant Wholesalers	42449035	Other Grocery & Related Products Merchant Wholesalers
42444003	Poultry & Poultry Product Merchant Wholesalers	42449037	Other Grocery & Related Products Merchant Wholesalers
42445002	Confectionery Merchant Wholesalers	42449042	Other Grocery & Related Products Merchant Wholesalers
42445004	Confectionery Merchant Wholesalers	42449044	Other Grocery & Related Products Merchant Wholesalers
42445008	Confectionery Merchant Wholesalers	42449046	Other Grocery & Related Products Merchant Wholesalers
42445010	Confectionery Merchant Wholesalers	42449047	Other Grocery & Related Products Merchant Wholesalers
42446001	Fish & Seafood Merchant Wholesalers	42449050	Other Grocery & Related Products Merchant Wholesalers

42446002	Fish & Seafood Merchant Wholesalers	42449055	Other Grocery & Related Products Merchant Wholesalers
42447002	Meat & Meat Product Merchant Wholesalers	42449056	Other Grocery & Related Products Merchant Wholesalers
42447005	Meat & Meat Product Merchant Wholesalers	42449057	Other Grocery & Related Products Merchant Wholesalers
42447006	Meat & Meat Product Merchant Wholesalers	42449061	Other Grocery & Related Products Merchant Wholesalers
42448007	Fresh Fruit & Vegetable Merchant Wholesalers	42449064	Other Grocery & Related Products Merchant Wholesalers
42448008	Fresh Fruit & Vegetable Merchant Wholesalers	42451002	Grain & Field Bean Merchant Wholesalers
42448009	Fresh Fruit & Vegetable Merchant Wholesalers	42451005	Grain & Field Bean Merchant Wholesalers
42448010	Fresh Fruit & Vegetable Merchant Wholesalers	42459003	Other Farm Product Raw Material Merchant Wholesalers
42448011	Fresh Fruit & Vegetable Merchant Wholesalers	42459005	Other Farm Product Raw Material Merchant Wholesalers
42449002	Other Grocery & Related Products Merchant Wholesalers	42459007	Other Farm Product Raw Material Merchant Wholesalers
42449003	Other Grocery & Related Products Merchant Wholesalers	42459008	Other Farm Product Raw Material Merchant Wholesalers
42449005	Other Grocery & Related Products Merchant Wholesalers	42459010	Other Farm Product Raw Material Merchant Wholesalers
42449006	Other Grocery & Related Products Merchant Wholesalers	42459017	Other Farm Product Raw Material Merchant Wholesalers
RETAIL TRADE			
44511001	Supermarkets & Other Grocery (except Convenience) Stores	44529902	All Other Specialty Food Stores
44511002	Supermarkets & Other Grocery (except Convenience) Stores	44529903	All Other Specialty Food Stores
44511003	Supermarkets & Other Grocery (except Convenience) Stores	44529905	All Other Specialty Food Stores
44511005	Supermarkets & Other Grocery (except Convenience) Stores	44529906	All Other Specialty Food Stores
44511006	Supermarkets & Other Grocery (except Convenience) Stores	44529907	All Other Specialty Food Stores
44511007	Supermarkets & Other Grocery (except Convenience) Stores	44529909	All Other Specialty Food Stores
44511008	Supermarkets & Other Grocery (except Convenience) Stores	44529910	All Other Specialty Food Stores
44512001	Convenience Stores	44529911	All Other Specialty Food Stores
44521001	Meat Markets	44529912	All Other Specialty Food Stores
44521003	Meat Markets	44529914	All Other Specialty Food Stores
44521004	Meat Markets	44529915	All Other Specialty Food Stores
44521006	Meat Markets	44529917	All Other Specialty Food Stores
44521009	Meat Markets	44529918	All Other Specialty Food Stores
44521010	Meat Markets	44529920	All Other Specialty Food Stores
44521012	Meat Markets	44529921	All Other Specialty Food Stores
44522003	Fish & Seafood Markets	44529923	All Other Specialty Food Stores
44522004	Fish & Seafood Markets	44529924	All Other Specialty Food Stores
44523001	Fruit & Vegetable Markets	44529927	All Other Specialty Food Stores
44523003	Fruit & Vegetable Markets	44529929	All Other Specialty Food Stores
44523005	Fruit & Vegetable Markets	44529930	All Other Specialty Food Stores
44523006	Fruit & Vegetable Markets	44529932	All Other Specialty Food Stores
44529202	Confectionery & Nut Stores	44529934	All Other Specialty Food Stores
44529204	Confectionery & Nut Stores	44529936	All Other Specialty Food Stores
44529205	Confectionery & Nut Stores	44529938	All Other Specialty Food Stores

Survey administration

As noted, the survey was conducted via telephone. The survey was programmed by Quorus and its data collection partner in both English and French via Computer-Assisted Telephone Interviewing software (CATI). Respondents had the option to complete the survey questionnaire in the official language of their choice. Assistance was available from bilingual staff members as required, with ongoing bilingual supervision.

If an interviewer did not speak the official language requested by the respondent, the interview transferred to another interviewer or a call-back was arranged within 20 minutes (or at another time if requested by the respondent). When calling to a particular location with a predominant language (e.g., French in Quebec), initial calling was conducted by interviewers who spoke the predominant language, to minimize the number of transfers required.

In terms of training, in addition to a thorough general screening and training process, supervisors and interviewers were provided with customized project-specific training, a review of the questionnaire including specific terminology, acronyms and pronunciations, and background information on the project goals and objectives.

In terms of supervision, as with all projects there was a ratio of one supervisor for every 10 interviewers working. This “floor supervisor” answers questions, handles escalations, ensures that technology is functioning properly, and blind monitors interviewers.

Respondents were able to verify the legitimacy of the survey via contacting representatives of Quorus and/or CFIA, or via the Canadian Research Insights Council’s Research Verification Service.

The programmed survey was thoroughly tested to ensure question order and skip patterns were properly represented. In addition to this testing, a pre-test was conducted resulting in 11 English and 10 French surveys. The overall purpose of the pre-test was to ensure that:

- The wording of the questions was clearly understood and unambiguous;
- The sequence of the questions was appropriate;
- The necessary response categories had been included for each question; and
- Neither specific questions nor the survey overall evoked a negative reaction or discomfort among respondents.

After the pre-test, the data was carefully reviewed to ensure accuracy and identify any aspects that needed to be modified. In addition to the actual survey queries, a section was included at the end of the questionnaire to ascertain respondent comprehension and experience with the survey.

Given the average completion length of roughly 19 minutes, cuts to the survey were made prior to fully launching the survey, and the responses were ultimately included in the final sample. As well, the definition for “intraprovincial only” respondents was broadened to improve the incidence rate, as it was discovered that some intraprovincial business respondents were incorrectly classified as federally regulated business respondents.

Fieldwork was monitored on an ongoing basis, allowing supervisors to determine if there were any challenges via the call disposition/reasons for non-response information. The average interview lasted approximately 17 minutes.

The tables below display industry and regional data in terms of the actual distribution of federally regulated Canadian food businesses, as catalogued by our sample provider. As well, target quotas and completed surveys for each industry and region are detailed (both in terms of the actual *number* of surveys completed, and the *percentage* of all surveys completed). The tables on the pages below present data with the weighted and unweighted *number* as well as *percentage* of surveys collected.

Figure 37. Distribution of the target population and of the final sample

Subsegments	Sample universe (n=)	Sample universe (%)	Surveys completed (unweighted) (n=)	Surveys completed (unweighted) (%)	Surveys completed (weighted) (n=)	Surveys completed (weighted) (%)
Industry – Agriculture, forestry, fishing, and hunting	8,053	15.9%	69	13.4%	109	21.1%
Industry – Manufacturing	4,688	9.3%	158	30.6%	140	27.1%
Industry – Wholesale trade	10,274	20.3%	101	19.6%	91	17.5%
Industry – Retail trade	27,636	54.6%	188	36.4%	177	34.2%
Region – British Columbia	6,418	12.7%	64	12.4%	59	11.3%
Region – Alberta	5,066	10.0%	51	9.9%	46	9.0%
Region – Saskatchewan	2,801	5.5%	14	2.7%	26	5.0%
Region – Manitoba	1,783	3.5%	19	3.7%	16	3.1%
Region – Ontario	17,003	33.6%	150	29.1%	162	31.3%
Region – Quebec	14,107	27.9%	176	34.1%	172	33.3%
Region – New Brunswick	1,022	2.0%	12	2.3%	9	1.7%
Region – Nova Scotia	1,362	2.7%	13	2.5%	16	3.0%
Region – Prince Edward Island	294	0.6%	5	1.0%	4	0.8%
Region – Newfoundland and Labrador	673	1.3%	8	1.6%	6	1.2%
Region – Territories	122	0.2%	4	0.8%	2	0.2%

For this study, a soft quota for “Intraprovincial Only” businesses was established to maximize representation of this segment in the overall sample (n=200). Ultimately, these results remained unweighted and were presented separately from the federally regulated business results. Results were not weighed since there is no data available to determine the national or regional distribution of these types of businesses. It should also be noted that “Retail Only” businesses were excluded from participation.

Data was monitored to also ensure that multiple locations from the same franchises were not overrepresented in the sample.

Federally regulated business results were weighted using industry totals from the sample universe provided by our sample provider and then by province.

Participation/Response rate: The rate below was derived using the principal elements of the formula recommended by the Public Opinion Research Directorate of the Government of Canada:

Figure 38. Completion results:

A. Total numbers attempted	20,749
Total invalid numbers	5,406
B. Total unresolved numbers (U)	6,821
No answer/answering machine	6,821
C. In-scope non-responding units (IS)	7,158
Language barrier	556
Incapable of completing (ill/deceased)	179
Callback (respondent not available)	1,402
Refusal	4,917
Termination	104
D. Responding units (R)	1,364
Quota full/not completed	65
Completed interviews	733
NQ - None of the above at S5, S7 & S8	86
NQ - Retail only	480
Rounded response rate: $UR \div (NR + UNR + UR) = 1,136 \div (10,741 + 4,511 + 1,136)$	8.9%
Incidence	58.5%

Given that this telephone survey methodology entailed a probability sampling approach, the data collected can be extrapolated to the Canadian population of food businesses, within the limitations of the attendant margins of error and the confidence interval.

The margin of error for the federally regulated business results is +/- 4.3%, 19 times out of 20. The research findings can be extrapolated to the broader audience considering the margin of error associated with this sample size. The margins of error for the results in this study will vary based on a variety of factors. For instance, results for sub-groups with smaller sample sizes will have a higher margin of error. As well, the margin of error is typically highest for questions where 50% of respondents answered one way and 50% answered another way. The margin of error typically decreases as the percent for a particular response approaches 0% or 100%.

A margin of error could not be calculated for the “Intraprovincial Only” sample, as the population totals were not known at the time of the study.

Respondent profile

Figure 39. Business segment by region and company size

Business regulation	Total (n=701)	Atlantic (n=44)	Quebec (n=254)	Ontario (n=213)	West (n=190)	Micro (n=234)	Small (n=167)	Medium / Large (n=294)
Intraprovincial only	26%	14%	31%	29%	21%	36%	27%	18%
Federally regulated	74%	86%	69%	71%	79%	64%	73%	82%

Base: All respondents, n=701.

Federally regulated businesses

Figure 40. Region by industry sector and company size

Region	Total (n=516)	Agriculture (n=69)	Processor / Manufacturer (n=158)	Wholesaler/ Distributor (n=101)	Retailer (n=188)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
Atlantic (NET)	7%	10%	6%	3%	10%	7%	10%	7%
New Brunswick	2%	4%	2%	2%	2%	2%	3%	2%
Nova Scotia	3%	1%	3%	1%	4%	1%	2%	4%
Newfoundland & Labrador	2%	1%	1%	-	3%	1%	4%	<1%
Prince Edward Island	1%	3%	1%	-	1%	2%	1%	<1%
Quebec	34%	42%	44%	50%	14%	31%	34%	37%
Ontario / Nunavut (NET)	29%	26%	23%	31%	36%	33%	26%	29%
Ontario	29%	26%	23%	31%	35%	33%	26%	28%
Nunavut	<1%	-	-	-	1%	-	-	1%
West (NET)	29%	22%	27%	16%	41%	30%	30%	28%
British Columbia	12%	7%	13%	10%	15%	14%	12%	11%
Alberta	10%	6%	8%	5%	15%	13%	9%	9%
Manitoba	4%	6%	2%	1%	6%	1%	4%	4%
Saskatchewan	3%	3%	3%	-	4%	1%	4%	3%
Yukon	<1%	-	1%	-	1%	1%	-	<1%

QS1. Province/territory. Base: All respondents, federally regulated, n=516.

Figure 41. Company size by industry sector and region

Company size	Total (n=516)	Agriculture (n=69)	Processor / Manufacturer (n=158)	Wholesaler / Distributor (n=101)	Retailer (n=188)	Atlantic (n=38)	Quebec (n=176)	Ontario (n=152)	West (n=150)
1 (Self-employed)	8%	10%	8%	13%	5%	11%	6%	9%	10%
2-4 employees	21%	23%	18%	27%	19%	16%	20%	23%	20%
5-10 employees	24%	25%	17%	23%	29%	32%	24%	21%	24%
11-99 employees	35%	35%	40%	34%	32%	29%	40%	32%	35%
100-499 employees	8%	6%	11%	2%	10%	8%	9%	11%	6%
500 employees or more	3%	1%	4%	1%	4%	5%	2%	4%	3%
DK / Prefer not to say	1%	-	1%	1%	1%	-	-	1%	2%

QS3. Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. Base: All respondents, federally regulated, n=516.

Figure 42. Industry sector by region and company size

Industry sector	Total (n=516)	Atlantic (n=38)	Quebec (n=176)	Ontario (n=152)	West (n=150)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
Processor or Manufacturer	31%	26%	40%	24%	28%	28%	22%	36%
Retailer	36%	47%	15%	44%	51%	30%	45%	36%
Agriculture	13%	18%	16%	12%	10%	15%	14%	12%
Wholesale or distributor	20%	8%	29%	20%	11%	27%	19%	15%

QS4. Which of the following categories best describes your business? Base: All respondents, federally regulated, n=516.

Figure 43. Business activities by region and company size

Business activities	Total (n=516)	Atlantic (n=38)	Quebec (n=176)	Ontario (n=152)	West (n=150)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
Import food products	62%	45%	52%	71%	70%	53%	66%	67%
Export food products	29%	29%	37%	24%	26%	24%	24%	36%
Send food products to another province or territory	49%	55%	56%	46%	43%	52%	40%	52%
None of the above	6%	5%	6%	7%	4%	12%	4%	3%

QS5. Does your business do any of the following? Base: All respondents, federally regulated, n=516.

Figure 44. Use of a broker by region and company size

Use of a broker	Total (n=322)	Atlantic (n=17)	Quebec (n=92)	Ontario (n=108)	West (n=105)	Micro (n=79)	Small (n=80)	Medium / Large (n=161)
Import ourselves	28%	35%	34%	30%	20%	38%	30%	22%
Import through a broker	43%	47%	35%	39%	52%	38%	40%	47%
Both	17%	12%	23%	20%	9%	16%	13%	19%
Other	7%	6%	4%	4%	11%	5%	13%	4%
DK / Prefer not to say	6%	-	4%	7%	8%	3%	5%	8%

QS6. Do you import food products yourself or through a broker? Base: Federally regulated food importers, n=322.

Figure 45. Provincial or national distribution by region and company size

Provincial or national activities	Total (n=516)	Atlantic (n=38)	Quebec (n=176)	Ontario (n=152)	West (n=150)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
Prepare, package, or label food for sending to <u>another</u> province/territory or country	34%	53%	39%	29%	31%	30%	29%	40%
Prepare, package, or label food for sale or trade <u>within</u> your province/territory	68%	74%	69%	65%	70%	63%	61%	75%
None of the above	27%	21%	26%	30%	27%	31%	36%	20%

QS7. And does your business do any of the following? [SELECT ALL THAT APPLY] Base: All respondents, federally regulated, n=516.

Figure 46. Direct or online sales by region and company size

Direct or online sales	Total (n=516)	Atlantic (n=38)	Quebec (n=176)	Ontario (n=152)	West (n=150)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
Sell food directly to consumers	73%	82%	65%	74%	81%	72%	81%	70%
Sell food products online	35%	37%	29%	35%	41%	43%	40%	26%
None of the above	22%	13%	30%	22%	14%	20%	16%	26%

QS8. And does your business do any of the following? [SELECT ALL THAT APPLY] Base: All respondents, federally regulated, n=516.

Figure 47. Provincial or national online sales by region and company size

Provincial or national online sales	Total (n=179)	Atlantic (n=14)	Quebec (n=51)	Ontario (n=53)	West (n=61)	Micro (n=64)	Small (n=49)	Medium / Large (n=63)
Sell food products <u>online</u> within your province/territory	94%	100%	92%	92%	97%	95%	86%	100%
Sell food products <u>online</u> to other provinces or other countries	58%	71%	49%	57%	64%	75%	59%	38%
None of the above	1%	-	2%	2%	-	-	4%	-

QS9. Do you...? [SELECT ALL THAT APPLY] Base: Online sellers, federally regulated, n=179.

Figure 48. Types of foods dealt with by industry sector and company size

Types of foods dealt with	Total (n=516)	Agriculture (n=69)	Processor / Manufacturer (n=158)	Wholesaler/ Distributor (n=101)	Retailer (n=188)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
Manufactured foods	58%	17%	47%	64%	78%	59%	52%	59%
Fresh fruits or vegetables	42%	62%	23%	28%	59%	31%	35%	53%
Processed fruit or vegetable products	40%	19%	29%	36%	59%	35%	29%	48%
Dairy products	38%	9%	25%	18%	70%	23%	37%	47%
Meat products and food animals	35%	12%	20%	22%	65%	19%	36%	45%
Egg and processed egg products	31%	12%	15%	16%	59%	14%	30%	42%
Maple syrup or maple products	31%	20%	14%	19%	55%	24%	25%	38%
Honey	30%	17%	12%	19%	57%	20%	25%	40%
Fish	30%	6%	14%	25%	55%	15%	28%	40%
Flour or grain	4%	3%	6%	3%	3%	6%	2%	3%
Coffee/coffee beans	3%	1%	3%	3%	2%	4%	4%	1%
Bakery products/bread	2%	-	4%	1%	2%	1%	3%	3%
Chocolate	1%	-	3%	-	1%	-	3%	1%
Grocery items/everything	1%	-	1%	2%	2%	2%	2%	1%
Alcohol	1%	1%	1%	-	1%	1%	1%	1%
Nuts	1%	-	2%	-	1%	2%	-	-
Water (Spring water)	1%	-	2%	1%	-	-	1%	1%
Prepared meals / Meals to go	1%	-	-	1%	2%	1%	2%	<1%
Spices & Herbs	1%	1%	-	1%	1%	2%	-	-
Other	1%	3%	-	-	2%	1%	2%	<1%

QS11. Which of the following foods does your company deal with? [SELECT ALL THAT APPLY] Base: All respondents, federally regulated, n=516.

Figure 49. Indigenous status by region and company size

Indigenous status	Total (n=516)	Atlantic (n=38)	Quebec (n=176)	Ontario (n=152)	West (n=150)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
Yes	5%	3%	2%	9%	7%	6%	8%	3%
No	93%	95%	97%	91%	91%	93%	92%	94%
DK / Prefer not to say	2%	3%	2%	1%	2%	1%	-	3%

QD3. Would you classify your company as Indigenous-owned or -operated? Base: All respondents, federally regulated, n=516.

Figure 50. Annual revenue by industry sector and company size

Annual revenue	Total (n=516)	Agriculture (n=69)	Processor / Manufacturer (n=158)	Wholesaler/ Distributor (n=101)	Retailer (n=188)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
\$30,000 or less per year	4%	4%	4%	4%	4%	12%	1%	1%
Between \$30,000 and less than \$100,000 per year	10%	13%	8%	12%	11%	25%	11%	1%
Between \$100,000 and less than \$500,000 per year	18%	19%	15%	20%	19%	33%	23%	5%
Between \$500,000 and less than \$1 million per year	12%	19%	9%	7%	14%	8%	21%	9%
Between \$1 million and less than \$5 million per year	21%	17%	27%	22%	18%	8%	23%	29%
\$5 million or more per year	19%	17%	20%	20%	19%	1%	6%	38%
DK / Prefer not to say	16%	10%	17%	16%	16%	13%	15%	17%

QD4. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All respondents, federally regulated, n=516.

Figure 51. Women in senior management by industry sector and company size

% of females in senior management	Total (n=516)	Agriculture (n=69)	Processor / Manufacturer (n=158)	Wholesaler/ Distributor (n=101)	Retailer (n=188)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
0%	16%	25%	15%	26%	8%	32%	16%	6%
1% to 24%	19%	12%	16%	14%	27%	9%	22%	24%
25% to 49%	13%	17%	15%	15%	9%	5%	10%	20%
50% to 74%	28%	30%	29%	25%	27%	33%	26%	25%
75% to 99%	8%	7%	8%	7%	9%	1%	9%	13%
100%	8%	4%	12%	5%	8%	15%	8%	4%
DK / Prefer not to say	9%	4%	6%	9%	12%	6%	9%	9%

QD5. Can you provide an approximate percentage of individuals in your company with a senior management role that identify as women? Base: All respondents, federally regulated, n=516.

Figure 52. Visible minorities in senior management by industry sector and company size

% of visible minorities in senior management	Total (n=516)	Agriculture (n=69)	Processor / Manufacturer (n=158)	Wholesaler/ Distributor (n=101)	Retailer (n=188)	Micro (n=150)	Small (n=122)	Medium / Large (n=240)
0%	53%	75%	58%	59%	38%	63%	58%	46%
1% to 24%	14%	10%	15%	6%	18%	4%	15%	19%
25% to 49%	6%	4%	6%	8%	5%	1%	5%	9%
50% to 74%	7%	3%	8%	7%	8%	9%	5%	7%
75% to 99%	2%	1%	3%	1%	1%	1%	2%	2%
100%	7%	1%	4%	11%	9%	15%	3%	3%
DK/Prefer not to say	12%	4%	8%	8%	21%	8%	12%	14%

QD6. Can you provide an approximate percentage of individuals in your company with a senior management role that might identify as a visible minority?
Base: All respondents, federally regulated, n=516.

Intraprovincial only businesses

Figure 53. Region by industry sector and company size

Region	Total (n=185)	Agriculture (n=78)	Processor / Manufacturer (n=72)	Wholesaler/ Distributor (n=33)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
Atlantic (NET)	3%	4%	-	6%	4%	2%	4%
New Brunswick	2%	3%	-	-	2%	-	2%
Nova Scotia	1%	1%	-	3%	1%	-	2%
Newfoundland & Labrador	1%	-	-	3%	-	2%	-
Prince Edward Island	-	-	-	-	-	-	-
Quebec	42%	47%	38%	42%	35%	44%	54%
Ontario / Nunavut (NET)	33%	37%	31%	30%	37%	38%	22%
Ontario	33%	37%	31%	30%	37%	38%	22%
Nunavut	-	-	-	-	-	-	-
West (NET)	22%	12%	32%	21%	25%	16%	20%
British Columbia	9%	5%	17%	3%	11%	9%	7%
Alberta	7%	3%	10%	9%	8%	2%	7%
Manitoba	2%	-	3%	3%	1%	2%	2%
Saskatchewan	4%	4%	3%	6%	5%	2%	4%
Yukon	-	-	-	-	-	-	-

QS1. Province/territory. Base: All respondents, intraprovincial only, n=185.

Figure 54. Company size by industry sector and region

Company size	Total (n=185)	Agriculture (n=78)	Processor / Manufacturer (n=72)	Wholesaler/ Distributor (n=33)	Atlantic (n=6)	Quebec (n=78)	Ontario (n=61)	West (n=40)
1 (Self-employed)	17%	18%	18%	12%	17%	12%	16%	28%
2-4 employees	29%	42%	19%	15%	33%	26%	34%	25%
5-10 employees	24%	18%	29%	30%	17%	26%	28%	18%
11-99 employees	27%	21%	28%	39%	33%	36%	15%	28%
100-499 employees	2%	-	6%	-	-	1%	5%	-
500 employees or more	1%	1%	-	3%	-	-	2%	3%
DK / Prefer not to say	17%	18%	18%	12%	17%	12%	16%	28%

QS3. Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. Base: All respondents, intraprovincial only, n=185.

Figure 55. Industry sector by region and company size

Industry sector	Total (n=185)	Atlantic (n=6)	Quebec (n=78)	Ontario (n=61)	West (n=40)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
Processor or Manufacturer	39%	-	35%	36%	58%	32%	47%	44%
Retailer	-	-	-	-	-	-	-	-
Agriculture	42%	50%	47%	48%	23%	56%	31%	30%
Wholesale or distributor	18%	33%	18%	16%	18%	11%	22%	24%
All of the above	1%	17%	-	-	3%	1%	-	2%

QS4. Which of the following categories best describes your business? Base: All respondents, intraprovincial only, n=185.

Figure 56. Provincial or national distribution by region and company size

Provincial or national activities	Total (n=185)	Atlantic (n=6)	Quebec (n=78)	Ontario (n=61)	West (n=40)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
Prepare, package, or label food for sending to another province/territory or country	-	-	-	-	-	-	-	-
Prepare, package, or label food for sale or trade within your province/territory	71%	67%	72%	77%	60%	68%	71%	76%
None of the above	29%	33%	28%	23%	40%	32%	29%	24%

QS7. And does your business do any of the following? [SELECT ALL THAT APPLY] Base: All respondents, intraprovincial only, n=185.

Figure 57. Direct or online sales by region and company size

Direct or online sales	Total (n=185)	Atlantic (n=6)	Quebec (n=78)	Ontario (n=61)	West (n=40)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
Sell food directly to consumers	85%	100%	83%	85%	85%	89%	82%	80%
Sell food products online	24%	-	18%	34%	25%	26%	27%	20%
None of the above	11%	-	14%	10%	10%	7%	13%	17%

QS8. And does your business do any of the following? [SELECT ALL THAT APPLY] Base: All respondents, intraprovincial only, n=185.

Figure 58. Types of foods dealt with by industry sector and company size

Types of foods dealt with	Total (n=185)	Agriculture (n=78)	Processor / Manufacturer (n=72)	Wholesaler/ Distributor (n=33)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
Fresh fruits or vegetables	45%	63%	25%	48%	43%	36%	57%
Meat products and food animals	38%	22%	47%	55%	27%	44%	52%
Manufactured foods	29%	17%	33%	52%	26%	27%	37%
Processed fruit or vegetable products	26%	21%	28%	36%	18%	24%	41%
Maple syrup or maple products	23%	21%	18%	42%	15%	27%	33%
Dairy products	23%	12%	25%	45%	13%	27%	35%
Egg and processed egg products	23%	17%	21%	39%	14%	13%	44%
Honey	21%	19%	17%	33%	21%	9%	30%
Fish	13%	4%	14%	33%	4%	18%	24%
Water (Spring water)	3%	1%	4%	6%	1%	4%	4%
Bakery products/bread	3%	1%	6%	-	4%	-	4%
Chocolate	2%	-	6%	-	2%	2%	2%
Flour or grain	2%	1%	1%	3%	1%	4%	-
Coffee/coffee beans	1%	1%	1%	-	1%	-	2%
Grocery items/everything	1%	1%	-	3%	1%	2%	-
Prepared meals / Meals to go	1%	1%	1%	-	-	2%	2%
Alcohol	1%	-	1%	-	-	-	2%
Nuts	1%	-	1%	-	1%	-	-
Other	1%	-	1%	3%	2%	-	-

QS11. Which of the following foods does your company deal with? [SELECT ALL THAT APPLY] Base: All respondents, intraprovincial only, n=185.

Figure 59. Indigenous status by region and company size

Indigenous status	Total (n=185)	Atlantic (n=6)	Quebec (n=78)	Ontario (n=61)	West (n=40)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
Yes	4%	-	-	3%	13%	1%	4%	7%
No	95%	100%	99%	95%	85%	98%	96%	89%
DK / Prefer not to say	2%	-	1%	2%	3%	1%	-	4%

QD3. Would you classify your company as Indigenous-owned or -operated? Base: All respondents, intraprovincial only, n=185.

Figure 60. Annual revenue by industry sector and company size

Annual revenue	Total (n=185)	Agriculture (n=78)	Processor / Manufacturer (n=72)	Wholesaler/ Distributor (n=33)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
\$30,000 or less per year	15%	17%	17%	6%	30%	-	2%
Between \$30,000 and less than \$100,000 per year	13%	15%	13%	9%	19%	13%	4%
Between \$100,000 and less than \$500,000 per year	25%	35%	21%	15%	33%	31%	9%
Between \$500,000 and less than \$1 million per year	12%	14%	10%	6%	7%	18%	15%
Between \$1 million and less than \$5 million per year	19%	10%	25%	30%	4%	29%	37%
\$5 million or more per year	5%	3%	3%	18%	-	2%	17%
DK / Prefer not to say	10%	6%	13%	15%	7%	7%	17%

QD4. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All respondents, intraprovincial only, n=185.

Figure 61. Women in senior management by industry sector and company size

% of females in senior management	Total (n=185)	Agriculture (n=78)	Processor / Manufacturer (n=72)	Wholesaler/ Distributor (n=33)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
0%	22%	22%	21%	24%	25%	24%	15%
1% to 24%	12%	10%	17%	9%	6%	22%	15%
25% to 49%	12%	12%	13%	12%	5%	18%	19%
50% to 74%	31%	36%	29%	24%	38%	24%	28%
75% to 99%	5%	5%	3%	12%	4%	4%	9%
100%	11%	12%	13%	9%	20%	4%	4%
DK / Prefer not to say	5%	4%	6%	9%	2%	2%	11%

QD5. Can you provide an approximate percentage of individuals in your company with a senior management role that identify as women? Base: All respondents, intraprovincial only, n=185.

Figure 62. Visible minorities in senior management by industry sector and company size

% of visible minorities in senior management	Total (n=185)	Agriculture (n=78)	Processor / Manufacturer (n=72)	Wholesaler/ Distributor (n=33)	Micro (n=84)	Small (n=45)	Medium / Large (n=54)
0%	69%	81%	65%	48%	77%	78%	50%
1% to 24%	5%	3%	4%	15%	2%	7%	9%
25% to 49%	3%	1%	3%	6%	-	-	9%
50% to 74%	6%	6%	7%	6%	7%	7%	6%
75% to 99%	2%	-	6%	-	-	2%	6%
100%	4%	1%	6%	6%	7%	-	2%
DK/Prefer not to say	10%	8%	10%	18%	6%	7%	19%

QD6. Can you provide an approximate percentage of individuals in your company with a senior management role that might identify as a visible minority? Base: All respondents, intraprovincial only, n=185.

Appendices

Appendix A: Recruitment screener

Specifications

- Recruit 6 participants per group, for 5-6 to show.
- Participants to be paid \$200.
- 6 online focus groups with representatives of food businesses in Canada.
- Participants will be employees responsible for regulatory compliance from small and medium-sized food businesses.
 - Ensure a good mix of business lines recruited, including food importers, food exporters, retail, manufacturing businesses, businesses serving businesses (B2B) and companies doing business internationally.
 - There must be some representation from small and medium businesses with female management/ownership, companies started by newcomers or recently immigrated individuals.
- For sessions covering multiple provinces (Atlantic and Prairies), aim for a mix across provinces within each grouping.
- For sessions that include Territories, aim for 1-2 from the Territory in each session.

All times are stated in local area time unless specified otherwise.

**Group 1
Atlantic Canada**

November 12
7:00 pm AST

**Group 2
Prairies
(MB/SK/AB/NWT)**

November 14
6:00 pm CST

**Group 3
Ontario/Nunavut**

November 18
5:00 pm EST

**Group 4
Quebec [FRENCH]**

November 25
5:00 pm EST

**Group 5
Quebec [FRENCH]**

November 25
7:00 pm EST

**Group 6
British
Columbia/Yukon**

November 26
5:00 pm PST

A. Introduction

Hello, my name _____. I'm calling from Quorus Consulting, a Canadian public opinion research company and we are calling on behalf of the Canadian Food Inspection Agency (CFIA).

Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

[INTERVIEWER NOTE: FOR ENGLISH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN FRENCH, PLEASE RESPOND WITH, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à cette recherche. Nous vous remercions de votre intérêt." FOR FRENCH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN ENGLISH, PLEASE RESPOND WITH, "Unfortunately, we are looking for people who speak French to participate in this research. We thank you for your interest."]

From time to time, we solicit opinions by sitting down and talking with people and the business community. We are preparing to conduct a series of these discussions on behalf of the Government of Canada and the CFIA and I would like to speak to the individual in your organization who is most responsible for food safety of the food products that your business sells or produces. Please note this is not a sales call, this important research will help the Government understand industry's views on food safety practices and regulations.

This could be the owner of the company or a manager who oversees the sale of food products, the food safety manager or the quality assurance manager. Are you the right person to speak with?

ONCE APPROPRIATE CONTACT HAS BEEN REACHED – REPEAT INTRO IF NEEDED AND CONTINUE:

We are reaching out to you today to invite you to a research session to share your feedback on the opportunities and challenges the food industry and your company face and the role the Government of Canada plays in relation to these.

Other decision makers from companies located in Canada will be taking part in this research. It is a first-name basis only discussion so nobody, including the Government of Canada, will know the companies being represented. For their time, participants will receive a cash compensation.

Participation is voluntary and all opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy, including the Privacy Act and the Access to Information Act. We are simply interested in hearing your opinions, no attempt will be made to sell you anything. The format would be an online discussion lead by a research professional.

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: “The information collected through the research is subject to the provisions of the Privacy Act, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation.”]

But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix/variety of businesses. This should only take about 5 minutes. In case you are uncertain, **all my questions pertain to your company’s Canadian operations.** May I ask you a few questions?

Yes	1	CONTINUE
No	2	THANK & TERMINATE

B. Business and Participant Profile

1. How would you rate your own level of familiarity with the food safety protocols of the food products that your business sells or produces? Would you say you are...

Very familiar	1
Fairly familiar	2
Not very familiar	3
Not at all familiar	4

RECRUIT A MIX OF THOSE VERY FAMILIAR AND FAIRLY FAMILIAR

IF NOT VERY OR NOT AT ALL FAMILIAR, ASK: *Since this will be one of the themes discussed, is there someone else in your company who would be more familiar with these protocols?*

IF YES, ASK TO SPEAK WITH THAT PERSON INSTEAD

IF NO, THANK AND DISCONTINUE

2. In what province or territory is your company located?

Newfoundland and Labrador	1
Nova Scotia	2
Prince Edward Island	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Yukon	11
Nunavut	12
Northwest Territories	13

3. Which of the following activities apply to your business **[READ LIST - SELECT ALL THAT APPLY]**?

Import food products	1
Export food products	2
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	3
Grade, label or package food for export or to be sent across provincial or territorial borders	4
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	5
Send or convey food products across provincial or territorial borders (wholesaler/ distributors)	6
Sell food products at retail directly to consumers	7
Produce organic food [interviewer note: includes organic meats, dairy, etc.]	8
Prepare, process, treat, manufacture or preserve food for sale within your province only	9
None of the above	10

IF ONLY CODE "7" AT Q3, FLAG AS "RETAIL ONLY"

RECRUIT A MAXIMUM OF 2 “RETAIL ONLY” PER GROUP

**IN EACH GROUP, RECRUIT ONE PARTICIPANT WHO SELECTS CODE 9 ONLY. TAG AS
“PROVINCIAL REGULATOR”**

4. **[IF “NONE OF THE ABOVE” IN Q3: Ask]** What would you say is your company’s main business activity?
-

IF BUSINESS IS RELATED TO FOOD BUSINESS RECODE Q3 AND CONTINUE, OTHERWISE THANK AND TERMINATE

Flag as “FOOD IMPORTERS/EXPORTERS” if SELECTED 1,2,4,5 AT Q3

Flag as “MANUFACTURED FOOD SECTOR” if SELECTED “3” AT Q3

5. Which of the following best represents the number of people your company employs in Canada, including yourself? If you are a franchisee, please only consider your location.
[READ LIST] [Just total number of employees is acceptable including part-time and casual]

1 – [Self-employed]	1	“MICRO”
2-4 employees	2	“MICRO”
5-10 employees	3	“SMALL”
11-99 employees	4	“SMALL”
100-499 employees	5	“MEDIUM”
500 employees or more	6	TERMINATE
Don’t know [DO NOT READ]	8	TERMINATE
Refused [DO NOT READ]	9	TERMINATE

IN EACH GROUP, AIM FOR THE FOLLOWING MIX: 4 MICRO/SMALL, 2 MEDIUM

6. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. **[READ LIST] [IF REFUSE: Just as a reminder, please understand that we use this information for classification purposes only and do not record or share the identity of any company participating in the study.]**

- | | | |
|--|---|------------------|
| \$30,000 or less per year | 1 | |
| Between \$30,000 and less than \$100,000 per year | 2 | |
| Between \$100,000 and less than \$500,000 per year | 3 | |
| Between \$500,000 and less than \$1 million per year | 4 | |
| Between \$1 million and less than \$5 million per year | 5 | |
| \$5 million or more per year | 6 | |
| Don't know [DO NOT READ] | 8 | TERMINATE |
| Refused [DO NOT READ] | 9 | TERMINATE |

7. Are you an owner or manager of this business?

- | | |
|--------------------------------|---|
| Yes, business owner | 1 |
| Yes, a manager of the business | 2 |
| No | 3 |

8. Can you please provide me with your job title? _____

9. What is your gender? [If you do not feel comfortable disclosing, you do not need to do so] **[DO NOT READ LIST]**

- | | |
|--|---|
| Male | 1 |
| Female | 2 |
| Prefer to self-describe, please specify: _____ | 3 |
| Prefer not to answer | 4 |

AIM FOR 50/50 SPLIT OF MALE AND FEMALE, WHILE RECRUITING OTHER GENDER IDENTITIES AS THEY FALL

IF Q7= 1 OR 2, RECORD AS FEMALE OWNER/MANAGER – AIM FOR AT LEAST 1 IN EACH GROUP

10. **[ASK IF Q7 = 1 OR 2]** We are looking to invite business owners and managers with different backgrounds as well. In which of the following categories do you belong?

You were born in Canada	1
You immigrated to Canada within the past 5 years	2 “NEWCOMER”
You immigrated to Canada over 5 years ago	3

AIM FOR A MINIMUM OF 6 NEWCOMERS ACROSS ALL FOCUS GROUPS COMBINED

11. Participants in discussion groups are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in front of others? Are you... **READ OPTIONS**

- Very comfortable **MIN 5 PER GROUP**
- Fairly comfortable
- Not very comfortable **TERMINATE**
- Not at all comfortable **TERMINATE**

12. Have you ever attended a discussion group or interview on any topic that was arranged in advance and for which you received money for your participation?

- Yes **MAXIMUM 5 PER GROUP**
- No **GO TO INVITATION**

13. When did you last attend one of these discussion groups or interviews?

- Within the last 6 months **TERMINATE**
- Over 6 months ago

14. How many discussion groups or interviews have you attended in the past 5 years?

- Fewer than 5
- 5 or more **TERMINATE**

C. INVITATION TO PARTICIPATE

1. I would like to invite you to participate in an online focus group session where you will exchange your opinions in a moderated discussion with other individuals in your region. The discussion will be led by a researcher from the national public opinion research firm, Quorus Consulting. The session will be recorded but your participation will be confidential. The group will be hosted using an online web conferencing platform, taking place on [DAY OF WEEK], [DATE], at [TIME]. It will last 90 minutes (one and a half hours). People who attend will receive \$200 to thank them for their time.

Would you be interested in taking part in this study?

Yes 1

No 2 **THANK & TERMINATE**

2. The discussion group will be video-recorded. These recordings are used to help with analyzing the findings and writing the report. The results from the discussions will be grouped together in the research report, which means that individuals will not be identified in anyway. Is this acceptable?

Yes 1

No 2 **THANK & TERMINATE**

3. Individuals from the Canadian Food Inspection Agency (CFIA) and/or the Government of Canada involved in this research project may be observing the session. They will not take part in the discussion, and they will not know your full name. Is this acceptable?

Yes 1

No 2 **THANK & TERMINATE**

4. The recordings may also be used by the CFIA client team solely for presenting research findings internally however you would not be identified by name and nobody from the client team would contact you as a result of any feedback you provide. Is this acceptable?

Yes 1

No 2 **THANK & TERMINATE**

5. Thank you. Just to make sure, the group will take place on [DAY OF WEEK], [DATE], at [TIME] and it will last 90 minutes (one and a half hours). Following your participation, you will receive \$200 to thank you for your time. Are you interested and available to attend?

Yes	1	
No	2	THANK & TERMINATE

To conduct the session, we will be using a screen-sharing application called **Zoom**. **We will need to send you by email the instructions to connect.** The use of a computer or a tablet (not a smartphone) in a quiet room is necessary.

We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 to 15 minutes prior to your session.

As we are only inviting a small number of people to attend, your participation is very important to us. If for some reason you are unable to attend, **you cannot send someone to participate on your behalf** - please call us so that we can get someone to replace you. You can reach us at [INSERT NUMBER] at our office. Please ask for [INSERT NAME].

So that we can contact you to remind you about the focus group or in case there are any changes, can you please confirm your name and contact information for me? **[READ INFO AND CHANGE AS NECESSARY.]**

First name _____

Last Name _____

Email _____

Day time phone number _____

Night time phone number _____

Thank you!

If the respondent refuses to give his/her first or last name or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the focus group. If they still refuse THANK & TERMINATE.

Appendix B: Moderation guide

Introduction to Procedures (10 minutes)

Thank you all for joining this online focus group!

- Introduce moderator/firm and welcome participants to the focus group.
 - Thanks for attending.
 - My name is [INSERT MODERATOR NAME] and I work with Quorus Consulting, an independent marketing research company, and we are conducting research on behalf of the Government of Canada / CFIA.
 - Today we will be talking about food regulation in Canada, some of the challenges your business might encounter and the CFIA.
 - The discussion will last approximately 90 minutes.
 - If you have a cell phone or other electronic device, please turn it off.
- Describe focus group.
 - A discussion group is a “round table” discussion, meaning we will discuss something and everyone has an equal chance to express an opinion. We may also be asking you to answer survey questions from time to time to help guide the discussion.
 - My job is to facilitate the discussion, keeping us on topic and on time.
 - Your job is to offer your opinions on the topics I’ll be presenting to you tonight/today.
 - Your honest opinion is valued. There are no right or wrong answers. This is not a knowledge test.
 - Everyone’s opinion is important and should be respected.
 - We want you to speak up even if you feel your opinion might be different from others. Your opinion may reflect that of other businesses.
 - To participate in this session, please make sure your webcam and your microphone are on and that you can hear me clearly. If you are not speaking, I would encourage you to mute your line to keep background noise to a minimum...just remember to remove yourself from mute when you want to speak!
 - We might use the chat function. [MODERATOR EXPLAINS HOW TO ACCESS THE ZOOM CHAT FEATURE DEPENDING ON THE DEVICE THE PARTICIPANT IS USING]. Let’s do a quick test right now - please open the chat window and send the

group a short message (e.g., Hello everyone). If you have an answer to a question and I don't get to ask you specifically, please type your response in there. We will be reviewing all chat comments at the completion of this project.

- Explanations.
 - Please note that anything you say during these groups will be held in the strictest confidence. We do not attribute comments to specific people. Our report summarizes the findings from the groups but does not mention anyone by name. Please do not provide any identifiable information about yourself.
 - The final report for this session, and others, can be accessed through the Library of Parliament or Library and Archives Canada once it's posted.
 - Your responses will in no way affect your dealings with the Government of Canada.
 - The session is being audio-video recorded for report writing purposes / verify feedback. Short portions of the recordings will also be used internally by the client research team to support their internal communication of the research results.
 - Some of my colleagues involved in this project are watching this session and this is only so they can hear the comments first-hand.
- Please note that I am not an employee of the Government of Canada and may not be able to answer questions about what we will be discussing. If questions do come up over the course of the group, we will try to get answers for you before we wrap up the session.

Any questions?

So, let's go around the table and have everyone introduce themselves...I'll be curious to know the following:

- You are all involved in the food industry in one way or another - what type of business exactly do you own/operate/manage?
- What is your role or your position?

General Attitudes Towards and Awareness of Food Regulation and Compliance (15 minutes)

- Our conversation today will touch on a range of topics related to food regulation and compliance in Canada. To get us started on this topic, how would you generally describe Canada's approach to food regulation?
- How would you describe your approach to regulation... specifically food safety regulations?

Outcome based regulations

- Have you heard the term "outcome-based regulations?"
 - What does this mean to you? Can you describe or provide an example?

Basically, an outcome-based regulation is one that specifies the desired result that a regulation is intended to achieve, rather than describing a specific process or action that must be followed to achieve compliance, which are known as prescriptive regulations.

- **PROBE:** How confident are you that your company can properly incorporate these types of regulations in your operations?
- **PROBE:** Would it help if you were provided examples of specific types of measures you could put in place to meet the required outcomes?
- When it comes to meeting food regulations, there tend to be two different views:
 - Some believe that if a company can prove that their food is safe, it meets the regulations.
 - Others believe that to meet regulations, a food business should have to demonstrate the steps it took to achieve food safety in addition to proving that their food is safe.

What do you think?

Safe Food for Canadian Regulations (SFCR) (20 minutes)

Let's turn our attention to specific regulations that the CFIA enforces: The *Safe Food for Canadians Regulations*.

- Who in the group has heard of these regulations?
 - Would you describe these as outcome-based regulations?
 - To the best of your knowledge, what are the key safety requirements in the SFCR?

Some of the key safety requirements of the SFCR pertain to food preparation and other controls such as sanitation controls.

- When it comes to these specific areas, what are some of the main challenges your business faces, if any? What do you think is behind these challenges?
 - What role, if any, can the CFIA play in helping you address these challenges?
- And when it comes to food preparation and other controls such as sanitation controls, what do you think is behind some of the success your business has experienced in meeting the requirements?
- Is there any other area related to the SFCR that has been challenging for your business or perhaps may seem problematic in the near future?
 - What role, if any, can the CFIA play in helping you address these challenges?

CFIA Role in Food Safety Regulation (10 minutes)

I'd like to spend some time discussing the CFIA.

- In your own words, what is the role of the CFIA? **MODERATOR TO GET FEEDBACK FROM A FEW PARTICIPANTS**
- Specifically in terms of helping your business comply with food regulations in Canada, in what ways, if any, do you feel the CFIA has supported your business or made it easier for your company to comply?

CFIA Tools (10 minutes)

Let's now discuss some of the CFIA's resources.

CFIA Website

- Have you been to the CFIA website in the last couple of years? **SHOW OF HANDS**

SHARE SCREEN AND SHOW PARTICIPANTS MAIN PAGE

IF YES:

- Do you have any feedback on the website?

My CFIA

There is also a portal called My CFIA where businesses can manage and track services online, including certificates, licences, permits and registrations.

- Have you ever used this service?
 - **IF YES:** thoughts?
 - **IF NO:** Did you know it existed? What do you think of it?

Concept Testing (18 minutes)

Let's now discuss some messaging and some visual concepts being considered by the CFIA for ads that would appear online on websites you visit or in social media. Each of these ads are clickable, taking you to a website with more information.

We have some taglines we'd like to run by you as well as possible visuals, but we would like to get your feedback on them separately and then afterwards, I'd like to see which combinations are the most impactful.

Let's begin with four taglines – take a few moments to review them **[ALTERNATE ORDER IN EACH SESSION]**:

- I. Starting or expanding a food business? Know the rules
 - J. Food business? Know the rules
 - K. Got a food business? Get the rules
 - L. Know the rules for food businesses
-
- Overall, what are your initial thoughts and feelings about these taglines? Use the letter associated with each tagline when you share your feedback.
 - Which ones do you feel speak to you the most?
 - Which option is most likely to get your attention?

Let's now have a look at how these messages could be incorporated into three possible visual treatments:



Now that you've seen some taglines and visuals, which combination of the two would be most likely to get your attention, e.g. 2C or 3A?

<p>1</p> 	<p>3</p> 	<p>A. Starting or expanding a food business? Know the rules</p> <p>B. Food business? Know the rules</p> <p>C. Got a food business? Get the rules</p> <p>D. Know the rules for food businesses</p>
<p>2</p> 		

Help me understand your choice.

What other suggestions might you have in terms of a tagline and a visual?

- If the goal is to keep the headline short and impactful, do you have any wording suggestions that would make a message more relevant for you?
 - Should the ads refer to “rules” or “regulations”?
- Are there other visuals related to the food industry that come to mind that you believe would be more likely to get your attention?

Effectiveness of SFCR Communications (5 minutes)

I would like to turn our attention to communications from the CFIA as we near the end of our conversation.

- How would you describe the communications you receive from the CFIA?
 - More specifically, how would you describe the communications you received from the CFIA regarding the SFCR?
 - Is there something you feel they do really well?
 - Do you follow CFIA on any social media?
- Moving forward, how can communication from the CFIA be improved?

THANK AND CLOSE (2 minutes)

[MODERATOR CHECKS WITH CLIENT TEAM REGARDING ANY NEW QUESTIONS / CLARIFICATIONS NEEDED]

In parting, is there anything that you think I should have asked but I didn't?

Thanks again! The team that invited you to participate in this session will contact you regarding the manner in which you can receive the incentive we promised you. And have a great evening!

Food Business Line Questionnaire (2024/2025)

Quota Management

- Select sample to call at random, from businesses on list of approved NAICS codes (n=700, 500 nationally regulated parties and 200 provincially regulated parties – flagged as INTRAPROVINCIAL ONLY)
- Employees responsible for regulatory compliance from small, medium, and large-sized food businesses
- Representation from all provinces and territories in Canada. The regional distribution of the interviews will follow the natural distribution of the targeted industry verticals.

Introduction

Hello/Bonjour [**IN QUEBEC**: Bonjour/Hello], (**PAUSE**...) I am calling on behalf of the Government of Canada as we are conducting a brief survey of food businesses. I want to assure you that this is not a sales call. It is research sponsored by the Government of Canada. The survey we're conducting is voluntary, confidential and anonymous. This important research will help the Government understand industry's views on food safety practices and regulations. I won't ask your name, but I am asking for 15 minutes of your time.

I am hoping to speak with the person in your company who is most responsible for the safety of the food products that your business imports, produces or sells. This could be the owner of the company or a manager who oversees the sale of food products, the food safety manager or quality assurance manager. Are you the right person to speak with?

[**IF NO**: Can you please direct me to the correct person?] [**REPEAT FROM BEGINNING IF TRANSFERRED**]

[**ONCE CORRECT PERSON IDENTIFIED**]

Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

[NOTE: IF AT THIS POINT THE RESPONDENT PREFERS TO RESPOND IN FRENCH, THEN THE INTERVIEWER MUST BE ABLE TO EITHER PROCEED WITH THE INTERVIEW IN FRENCH OR READ THE FOLLOWING STATEMENT: "Je vous remercie. Quelqu'un vous rappellera bientôt pour mener le sondage en français."]

My name is _____ calling from _____. The Government of Canada has hired our company to do the survey.

The survey will take about 15 minutes to complete. We can call back at a more convenient time if you prefer [**IF SO**: Schedule a follow up call]. The information you provide will be administered according to the requirements of the *Privacy Act and the Personal Information Protection and Electronic Documents Act*. This is designed to protect your privacy.

PERSUADE IF NEEDED: This survey is registered with the Canadian Research Insights Council (CRIC). Should you have any questions about the survey, I can give you a contact person within the CFIA: Ric Hobbs, 613-462-7022.

Screeners and Classification

S1. [Record from sample – not asked] Province/territory

S2. [Record from sample – not asked] Full 8-digit North American Industry Classification System (NAICS) code

Let's start with a few questions to help determine the nature and size of your business...

S3. Which of the following best represents the number of people your company employs in Canada, including yourself? If you are a franchisee, please only consider your location. **[READ LIST] [Including part-time and casual employees]**

1 – [Self-employed]	1
2-4 employees	2
5-10 employees	3
11-99 employees	4
100-499 employees	5
500 employees or more	6
Don't know / Prefer not to say [DO NOT READ]	9

S4. Which of the following categories best describes your business? **[READ LIST – SELECT ONLY ONE]**

Agriculture	1
Processor or Manufacturer	2
Wholesaler or distributor	3
Retailer	4
Other (please specify):_____ [DO NOT READ]	77

S5. Does your business do any of the following? [READ LIST – SELECT ALL THAT APPLY]

Import food products	1
Export food products	2
Send food products to <u>another</u> province or territory [IF ASKED: For example, selling, wholesaling, distributing]	3
None of the above [DO NOT READ]	99

[ASK IF S5 = 1]

S6. Do you import food products yourself or through a broker? [READ LIST]

Import ourselves	1
Import through a broker	2
Both	3
Other	4
Don't know / Prefer not to say [DO NOT READ]	99

S7. And does your business do any of the following? [READ LIST – SELECT ALL THAT APPLY]

Prepare, package or label food for sending to <u>another</u> province/territory or country	1
Prepare, package or label food for sale or trade <u>within</u> your province/territory	2
None of the above [DO NOT READ]	99

S8. And does your business conduct any of the following? [READ LIST – SELECT ALL THAT APPLY]

Sell food directly to consumers [IF ASKED: This would mean you have a store front]	1
Sell food products online	2
None of the above [DO NOT READ]	99

[ASK IF S8 = 2 SELL FOOD PRODUCTS ONLINE]

S9. Do you...? [READ LIST – SELECT ALL THAT APPLY]

Sell food products <u>online</u> within your province/territory	1
Sell food products <u>online</u> to other provinces or other countries	2
None of the above [DO NOT READ]	99

[CODE AS "RETAIL ONLY" IF: S4=4 AND "NONE OF THE ABOVE" AT S5 – THANK AND TERMINATE]

[FLAG AS "INTRAPROVINCIAL ONLY" IF:

- ONLY SELECT "2" AT S7 AND SELECT "NONE OF THE ABOVE" IN S5
- SELECT "NONE OF THE ABOVE" IN S5 AND S7, SELECT ANY OF "1" OR "2" AT S8 AND, IF S9 IS ASKED, ONLY "1" IS SELECTED

QUOTA OF N=200, THEN THANK AND TERMINATE]

[IF "NONE OF THE ABOVE" IN S5, S7, AND S8 – ASK WHAT TYPE OF FOOD BUSINESS THEY ARE AND CHECK WITH SUPERVISOR/QUORUS]

S11. Which of the following foods does your company deal with? [READ LIST – SELECT ALL THAT APPLY]

RANDOMIZE 1-9

Dairy products	1
Egg and processed egg products	2
Fish	3
Fresh fruits or vegetables	4
Honey	5
Maple syrup or maple products	6
Meat products and food animals	7
Processed fruit or vegetable products	8
Manufactured foods [IF ASKED: This would include confectionary, snack foods, beverages, fats and oils, infant food, nuts, seeds, spices, condiments, cereals and pastas]	9
Or anything else? [SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]	77

Q1AA. Thinking about the past two years, have the following been a high, medium or low priority for your company?

RANDOMIZE

- a. Managing regulatory issues
- b. Managing public trust and corporate reputation
- c. Implementing technology or innovation solutions
- d. **[INTRAPROVINCIAL ONLY]** Expanding sales beyond provincial boundaries (which requires following federal regulations as well as provincial)

Low priority	1
Medium priority	2
High priority	3
None of the above [DO NOT READ]	99

Awareness of Food Safety Regulations

Let's turn to the subject of food safety regulations, specifically the ones that are overseen by the Canadian Food Inspection Agency, commonly known as the CFIA.

AA1. How familiar would you say your company is with the activities of the Canadian Food Inspection Agency? Please use a number between 1 and 7, where 1 means "not at all familiar" and 7 means "very familiar". **[REPEAT SCALE AS NEEDED]**

Not at all familiar	1
	2
	3
	4
	5
	6
Very familiar	7
Don't know / Prefer not to say [DO NOT READ]	99

A1. On a scale from 1 to 7, where 1 means "not at all clear" and 7 means "very clear", how well do you feel you understand the food safety regulations that apply to your business?

Not at all clear	1
	2
	3
	4
	5
	6
Very clear	7
Don't know / Prefer not to say [DO NOT READ]	99

A2ii. How familiar are you with the *Safe Food for Canadians Regulations*? Please use a scale of 1 to 7, where 1 means "not at all familiar" and 7 means "very familiar".

Not at all familiar	1
	2
	3
	4
	5
	6
Very familiar	7
Don't know / Prefer not to say [DO NOT READ]	99

[IF A2ii = 1, 2 OR 99 SKIP TO A8]

A2. Have you seen, read or heard anything about the *Safe Food for Canadians Regulations*?

Yes	1
No	2
Don't know / Prefer not to say [DO NOT READ]	99

[ASK IF A2=1]

A3. Where did you hear, see or read about the regulations? **[ACCEPT MULTIPLE RESPONSES IF OFFERED – LIMIT TO 3 SOURCES]**

Don't know / Prefer not to say **[DO NOT READ, PROMPT IF NECESSARY]** 99

A4. As far as you know, do you think the *Safe Food for Canadians Regulations* apply to your business?

Yes 1
No 2
Don't know / Prefer not to say **[DO NOT READ]** 99

A5. As far you know do you think the *Safe Food for Canadians Regulations* apply to on-line sales of food products?

Yes 1
No 2
Don't know / Prefer not to say **[DO NOT READ]** 99

[ASK IF S5=1]

A6. Were you aware that a Safe Food for Canadians licence is required to import food products into Canada? Would you say you were... **[READ LIST]**

Clearly aware of this requirement 1
Somewhat or vaguely aware, or, 2
Not aware of this requirement 3
Don't know / Prefer not to say **[DO NOT READ]** 99

[SKIP IF INTRAPROVINCIAL ONLY]

A6A. Were you aware that your CFIA licensing information must be updated when adding food commodities or new processes? Would you say you were... **[READ LIST]**

Clearly aware of this requirement	1
Somewhat or vaguely aware, or,	2
Not aware of this requirement	3
Don't know / Prefer not to say [DO NOT READ]	99

A7. From your perspective, which of the following food safety requirements of the SFCR is your biggest challenge? Would it be...? **[SINGLE RESPONSE]**

RANDOMIZE 1-5

Obtaining or maintaining a Safe Food for Canadians Licence	1
Implementing preventive controls	2
Maintaining a written preventive controls plan	3
Maintaining traceability records	4
Implementing traceability labelling on products	5
Other [SPECIFY] [DO NOT READ]	77
None of these are challenges [DO NOT READ]	99

A8. Do you use a private food safety or quality control certification system such as GFSI, ISO or QMP? **[IF ASKED: GFSI = Global Food Safety Initiative; ISO = International Organization for Standardization and QMP = Quality Management Program]**

Yes	1
No	2
Don't know / Prefer not to say [DO NOT READ]	99

A9. Which of the following items, if any, does your company have? **[READ LIST – SELECT ALL THAT APPLY]**

Safe Food for Canadians Licence	1
Preventive controls, but not a written plan	2
A written preventive controls plan	3
Traceability documents	4
Traceability labelling [IF ASKED: This is information on the label of a product that allows both you and your customers to identify whether a particular food is subject to a recall]	5
None of above [DO NOT READ]	98
Don't know / Prefer not to say [DO NOT READ]	99

A11. Switching now to a specific safety issue. As far as you know, could your product pose a risk of Listeria contamination?

Yes	1
No	2
Don't know / Prefer not to say [DO NOT READ]	99

[ASK IF A11=1]

A11A. Were you aware of the Health Canada Listeria policy? Would you say you were... **[READ LIST]**

Clearly aware of this requirement	1
Somewhat or vaguely aware, or,	2
Not aware of this requirement	3
Don't know / Prefer not to say [DO NOT READ]	99

[ASK IF A11A=1 OR 2]

A11B. As far as you know, has your company implemented requirements of the Health Canada Listeria policy? **[READ LIST]**

Yes, fully	1
Yes, but not fully yet	2
No, not yet	3
No, doesn't apply to our company	4
Don't know / Prefer not to say [DO NOT READ]	99

Transparency

[SKIP IF AA1 < 4]

T2. In your opinion, how transparent do you think the CFIA is when it comes to reporting and publishing non-compliance results? Please answer on a scale of 1 to 7, with 1 being not at all transparent, and 7 being very transparent.

Not at all transparent	1
	2
	3
	4
	5
	6
Very transparent	7
Don't know / Prefer not to say [DO NOT READ]	99

Information Search and Understanding

I1. How often do you look for information about food safety regulations or requirements of any kind? Would you say... **[READ LIST]**

Daily	1
Weekly	2
Monthly	3
Quarterly	4
Annually	5
Less often than annually	6
Never	98
Don't know / Prefer not to say [DO NOT READ]	99

13. What sources or types of information about food safety regulations do you go to or have you used in the past? **[DO NOT READ LIST – SELECT ALL THAT APPLY – PROMPT IF NEEDED]**

[NOTE: IF TWITTER, INSTAGRAM, OR FACEBOOK SELECTED PRODUCE MERGED SOCIAL MEDIA CODE FOR DATA TABLES]

Internet/website (SPECIFY: _____)	1
Google search	2
X (formerly Twitter)	3
Instagram	4
Facebook	5
LinkedIn	6
Media (TV, newspaper, magazine)	7
Canadian Food Inspection Agency (CFIA)	8
Government of Canada	9
Provincial government	10
Industry association	11
Financial institution	12
Colleagues/other producers/my network	13
Or anything else? [SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]	77
Don't know / Prefer not to say [DO NOT READ – EXCLUSIVE]	99

14A. Have you received any information from the CFIA in the past year?

Yes	1
No [SKIP TO I9]	2
Don't know/Not sure [DO NOT READ] [SKIP TO I9]	99

I4B. How has your business received information from the CFIA in the past year? [DO NOT READ LIST – SELECT ALL THAT APPLY]

Mail documents/letters	1
Telephone calls	2
Email notifications	3
Notices in My CFIA portal	4
Personal interaction with CFIA representative	5
CFIA website	6
CFIA social media	7
Through an industry association	8
Or anything else? [SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]	77
Don't know / Prefer not to say [DO NOT READ]	99

I5. Overall, how satisfied are you with the communications you have received from CFIA? Please use a number between 0 and 10, where 0 means “not at all satisfied” and 10 means “very satisfied”.

Not at all satisfied	0
	1
	2
	3
	4
	5
	6
	7
	8
	9
Very satisfied	10
Don't know / Prefer not to say [DO NOT READ]	99

I6. Why do you give CFIA a rating of [PIPE RESPONSE FROM I5] out of 10 for its communications with you?

I8. To what extent do you agree or disagree that communications provided from CFIA are clear and easy to understand? Do you... **[READ LIST]**

Strongly disagree	1
Somewhat disagree	2
Somewhat agree	3
Strongly agree	4
Don't know / Prefer not to say [DO NOT READ]	99

I9B. Is there a particular information product you would most prefer to receive from the CFIA? **[READ LIST – SELECT ONLY ONE OPTION – MOST PREFERRED]**

Videos	1
General web content	2
Digital Infographics	3
Chatbot	4
Checklists	5
Or anything else? [SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]	77
Depends on the type of content [DO NOT READ] [SKIP TO I12]	98
Don't know / Prefer not to say [DO NOT READ] [SKIP TO I12]	99

I9A. How would you most prefer to receive that information from the CFIA? [DO NOT READ LIST – SELECT ONLY ONE OPTION – MOST PREFERRED]

By mail	1
Telephone	2
Email	3
Notices in My CFIA portal	4
Personal interaction with CFIA representative	5
CFIA website	6
Social media (SPECIFY: _____)	7
Newsletter	8
Through an industry association	9
Or anything else? [SPECIFY: RECODE IF RELATED TO ANYTHING ON LIST ABOVE]	77
I don't want the CFIA to send me future communications	98
[DO NOT READ]	
Don't know / Prefer not to say [DO NOT READ]	99

I12. Over the past few years, have you had difficulty getting information you needed from CFIA?

Yes	1
No	2
Don't know / Prefer not to say [DO NOT READ]	99

[ASK IF I12 = 1]

I13. What specific topics did you have difficulty getting information on?

Ask CFIA

C4. “Ask CFIA” provides the food industry with one point of entry through the “Contact us” page of the CFIA website. Canadian food businesses and non-resident importers can submit questions about food regulatory requirements using an online form and “Ask CFIA” provides written answers.

Based on this definition, have you used the Ask CFIA service?

Yes	1
No	2
Don't know / Prefer not to say [DO NOT READ]	99

[SKIP TO C9 IF C4 = 2 OR 99]

C5. In the last year, how many times have you used the Ask CFIA service? **[PROMPT FOR ESTIMATE]**

Did not use in past year	1
1 time	2
2 times	3
3 times	4
4 times	5
5 or more	6
Don't know / Prefer not to say [DO NOT READ]	99

C7. Rate your overall level of satisfaction with the Ask CFIA service. Please use a scale of 1 to 7, where 1 means “not at all satisfied” and 7 means “very satisfied”.

Not at all satisfied	1
	2
	3
	4
	5
	6
Very satisfied	7
Don't know / Prefer not to say [DO NOT READ]	99

[ASK IF C7 = 1 TO 7]

C8. Why do you give the Ask CFIA service a rating of **[PIPE RESPONSE FROM C7]** for overall satisfaction?

C9. Since the start of the COVID pandemic the CFIA has moved to improve digital services, overall how satisfied are you with the changes to digital services? Please use a scale of 1 to 7, where 1 means “not at all satisfied” and 7 means “very satisfied”.

Not at all satisfied	1
	2
	3
	4
	5
	6
Very satisfied	7
Don't know / Prefer not to say [DO NOT READ]	99

Demographics / Language requirements

Thank you for your answers. We just have a few final demographic questions to classify your responses.

D3. Would you classify your company as Indigenous-owned or -operated?

Yes	1
No	2
Don't know / Prefer not to say [DO NOT READ]	99

D4. And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. **[READ LIST]** **[IF REFUSE:** Just as a reminder, please understand that we use this information for classification purposes only and do not record or share the identity of any company participating in the study.]

\$30,000 or less per year	1
Between \$30,000 and less than \$100,000 per year	2
Between \$100,000 and less than \$500,000 per year	3
Between \$500,000 and less than \$1 million per year	4
Between \$1 million and less than \$5 million per year	5
\$5 million or more per year	6
Don't know / Prefer not to say [DO NOT READ]	9

D5. Can you provide an approximate percentage of individuals in your company with a senior management role that identify as women?

Women _____ % [minimum: 0, maximum: 100]

Don't know / Prefer not to say **[DO NOT READ]**

999

[PERSUADER IF ASKED: The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported and in order to better understand the composition of leadership at Canadian food businesses we are asking about gender and other demographic characteristics of the leadership group. An estimate is fine for this question and if you do not know, that is fine as well.]

D6. Can you provide an approximate percentage of individuals in your company with a senior management role that might identify as a visible minority?

Visible minority _____ % [minimum: 0, maximum: 100]

Don't know / Prefer not to say **[DO NOT READ]**

999

[PERSUADER IF ASKED: The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported and in order to better understand the composition of leadership at Canadian food businesses we are asking about race and other demographic characteristics of the leadership group. An estimate is fine for this question and if you do not know, that is fine as well.]

Conclusion: thank respondent for their time and remind them that the feedback is very valuable to the CFIA.