



Canadian Food
Inspection Agency

Agence canadienne
d'inspection des aliments

Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations: 2018-2019

Canadian Food Inspection Agency

March 2019

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Ce rapport est aussi disponible en français.

Public opinion research with food businesses 2018-2019

Final Report

Prepared for the Canadian Food Inspection Agency
Supplier name: Quorus Consulting Group Inc.
March 2019

This public opinion research report presents the results of two waves of telephone surveys conducted by Quorus Consulting Group Inc. on behalf of the Canadian Food Inspection Agency. A first wave of surveys was conducted with 670 businesses in Canada in October and November 2018 and a follow-up wave was conducted with 700 businesses in Canada in February and March 2019. The questionnaire for the follow-up wave was largely similar to the one used for the initial wave.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique auprès du secteur alimentaire 2018-2019.

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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 "Rick Nadeau", is written over a light gray, textured rectangular background.

Rick Nadeau, President
Quorus Consulting Group Inc.

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Executive Summary

Research Purpose and Objectives

As part of the modern regulatory tool kit, the Canadian Food Inspection Agency (CFIA) combined 14 food safety regulations into the *New Safe Food for Canadians Regulations* (SFCR). The regulations were published in June of 2018 and came into force January 15, 2019.

CFIA requested public opinion research primarily to obtain insights on the food industry's views towards their food safety and food safety regulations in Canada, with a focus on small food businesses, food importers and exporters. This was done through a survey with businesses before the SFCR came into force (Wave 1), and a survey with businesses after the SFCR came into force (Wave 2). Specifically, CFIA wanted to gain a better understanding of awareness, motivations, perceptions and attitudes towards the following:

- The level of awareness of existing CFIA information products, including advertising,
- Understanding and confidence in the various roles and responsibilities within the food safety system,
- Resource needs and barriers to complying with regulatory requirements, to identify areas where compliance can be assisted with implementation of compliance promotion, communications, and support services,
- Awareness and satisfaction with My CFIA,
- Satisfaction with current services, and
- Expectations on future services and programs.

Summary of Findings

The research results presented in this report are often based on one of two different segments:

- Select questions were asked exclusively to “Retail-only businesses” in the food industry – these are businesses that self-identified as only selling product to consumers and not importing, preparing food for export or to move across provincial boundaries. These businesses do need to meet traceability requirements under SFCR.
- Other study results focus exclusively on food industry businesses that conduct at least more than one activity that has requirements under SFCR other than just retail – these are referred to as “businesses not exclusively in retail” in this report.

Awareness of CFIA and the Safe Food for Canadians Regulations

Over three quarters of businesses are at least somewhat familiar with CFIA. More specifically, 51% would rate their level of familiarity either a 6 or a 7 on a 7-point scale (where 1 meant not at all familiar and 7 meant very familiar). Another 32% would consider themselves somewhat familiar (a rating of 4 or 5) and 16% feel they are not very familiar (a rating of 1 to 3). Familiarity seems slightly lower from Wave 1 to Wave 2 (87% vs. 83% giving a rating from 4 to 7), however the difference is not statistically significant.

Respondents were asked if they had heard, seen or read any advertisements related to CFIA in the three to four weeks prior to participating in the survey. Of all businesses, 50% of respondents recall being exposed to CFIA advertisements. This includes 5% of respondents who remembered SFCR spontaneously (unaided awareness), 39% who remembered SFCR when asked specifically about it, and 6% who remember other CFIA ads but not specific to SFCR.

Among those having heard, seen or read something about SFCR who are in a business not exclusively in retail (59% of respondents), the most common sources were email (27%), colleagues and industry events (25%), the CFIA website (21%), followed by an online general source (18%). In Wave 1, among those having heard, seen or read something about SFCR who are in a business not exclusively in retail (50% of respondents), the most common sources were colleagues and industry events (30%), a CFIA employee or inspector (21%), the CFIA website (20%), followed by an online general source (18%).

Confidence in Meeting Food Safety Regulations

The majority (91%) of businesses felt very confident that they would meet food safety regulations and requirements if they were to be inspected. Among the remaining respondents, 8% felt somewhat confident and only 1% were not very confident. This is a statistically significant increase from 86% of businesses feeling very confident in meeting food safety regulations and requirements in Wave 1.

Commonly Conducted Food Safety Activities

A list of various food safety-related measures and activities was presented to survey respondents in both waves and they were asked to note the ones that apply to their company. The most popular food safety activities include documenting standard operating procedures on food safety, establishing a traceability program and internal training programs on food safety. Each of these was noted by over three-quarters of businesses in both waves. Additionally, 60% of businesses have preventive controls in place, which are outlined in a written plan.

Over two thirds of businesses not exclusively in retail (68%) have a high understanding of the food safety regulations that apply to their foods. This is a lower rating compared to that observed in Wave 1 (78%).

Survey respondents were provided with three potential challenges that food businesses might encounter and then asked to select the one that, from their perspective, would be the biggest challenge. Just over two in five food businesses (45%) selected traceability of food products as the biggest food safety challenge. This was followed by written preventive controls (30%), and 16% selected licencing.

Contact with CFIA

Over 7 in 10 (73%) businesses that are not exclusively in retail have had some sort of contact with CFIA over the past 12 months. The most common interaction with CFIA over the past 12 months was looking for information about food safety regulations or requirements on the CFIA's website (57%) while 42% claim to have been inspected, 34% contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, or requested a permission, licence, registration, or certificate from CFIA, and 33% contacted CFIA for information on (rather than requesting) a permission licence or certificate.

Businesses having contacted CFIA over the past 12 months most often did so through CFIA website (63%), followed by contacting CFIA by phone (48%), or by email (48%). A smaller proportion contacted CFIA in person (21%) and only a few did so via social media (1%). These results suggest that businesses in general are using multiple channels to contact CFIA.

Businesses were asked to rate the extent of helpfulness of the website when contacting CFIA for information. Half find the website very helpful.

Website users were asked to suggest what could be done to CFIA's inspection.gc.ca site to improve it. The main items identified for improvement are to make it easier to navigate and more user-friendly (21%), and to provide clearer information (17%).

Respondents were also asked to rate the helpfulness of email, phone and in-person service received when contacting CFIA for information. Nearly three quarters (75%) of those who contacted CFIA by phone found the support very useful and an additional 20% found it somewhat useful. Nearly two thirds (64%) of those who used email to contact CFIA found it very useful, and 28% somewhat useful. Of those who contacted CFIA in person, 54% found the information very useful and 15% found it somewhat useful. However, 30% did not know how to rate the service received.

Businesses were asked to indicate their preferred method to request and receive regulatory information from CFIA. The preferred method to receive this information is by email, as indicated by 78% of respondents, followed by 47% of respondents indicating to prefer this information by phone. A little over one third of respondents (35%) prefer a live customer service-based chat on the CFIA website, while just over a quarter (27%) prefer using a chatbot (27%). Less than a fifth prefer social media (15%), mail (7%), or in-person service (4%).

When asked the preferred method to receive CFIA services, 74% of businesses prefer to receive them by email, 52% on the CFIA website, 25% prefer to go to a CFIA office and receive them in person, and less than one fifth prefer to receive them by fax (17%), mail (10%), on social media (8%), or by phone (6%).

General Impressions of CFIA

Roughly half of businesses strongly agree that CFIA is fair when inspecting food businesses (54%), that it is easy to understand the information CFIA provides food businesses (52%), and that it provides enough

information to meet regulatory obligations (48%). Agreement drops slightly to 40% when asked if CFIA is efficient in its operations. Between 8% and 15% of businesses did not know enough about CFIA to be able to rate them across these five dimensions and about one in ten seem to disagree with each evaluation criteria.

My CFIA

The survey also examined awareness and likelihood to use the new digital service developed for convenient service delivery My CFIA.

Nearly half of respondents (44%) are aware of the My CFIA portal, from which 32% have used it. Both awareness and usage are significantly higher in Wave 2 than in Wave 1. Awareness increased from 26% to 44%, and usage more than doubled from 14% to 32%.

Among the 32% of businesses that have used My CFIA, 68% did so to request a new licence, 44% to register their business, 32% to renew their licence, 28% to obtain a permit, 15% to obtain an export certificate, and 10% only to enroll without using any other portal features.

Overall, satisfaction with the portal is positive, nearly half of users (46%) are very satisfied and 38% are somewhat satisfied. Satisfaction in Wave 1 was much lower, likely due to the higher number of respondents who had only enrolled and had not had the opportunity to experience the services that are now available.

According to participants who provided a lower satisfaction score for My CFIA, the most common reason was that the design was not user-friendly.

The study explored the likely use of My CFIA in the future. a little over, half (53%) of all businesses, not only in retail, are very likely to use My CFIA in the future and another 26% are somewhat likely.

Compliance Burden

Results reveal that over a quarter (28%) of businesses find the paperwork associated with food regulations very burdensome while one quarter (25%) find it not very burdensome.

Nearly one in three (29%) strongly agree that CFIA takes the needs of businesses into account when developing new information products, and a similar proportion (26%) strongly agrees that over the past 12 months they have spent less time searching for food safety information.

Overall Satisfaction with CFIA

Over two in five respondents (45%) felt very satisfied with the overall service received from CFIA in the past 12 months. Another 33% were somewhat satisfied and roughly one in 10 were not very satisfied. An important proportion (13%) did not provide a rating, probably because they had not interacted with CFIA over the past 12 months or they never interact with CFIA.

Finding Food Safety Information

Roughly one in three respondents (34%) indicated they do not have any challenges when it comes to finding information on food safety regulations or requirements. The main challenges for businesses when it comes to finding food safety information are the lack of clear information (15%), too much information (11%), and the CFIA website not being easy to navigate (11%). Other common challenges included time-consuming researching information, lack of notifications or updates, among others.

When asked specifically to identify the topics about which information was difficult to find, nearly half (48%) of all respondents felt there was no topic in particular that proved challenging. Some topics identified included new regulations or changes to rules (16%), labelling (9%), and food products (6%).

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 survey consisted of two national telephone surveys with businesses in the food industry in Canada based on a selected list of North American Industry Classification System (NAICS) codes provided by CFIA. The sample frames were selected from a list of businesses from InfoCanada, a common and reputable list provider in the industry.
- Quorus designed the survey instruments in English in conjunction with CFIA Project Authority. Quorus translated the client-approved English versions of the survey. Respondents had the choice to complete the interview in English or French.
- The survey was conducted following the *Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys*. Quorus informed respondents of their rights under the *Privacy and Access to Information Acts* and ensured that those rights were protected throughout the research process.
- The approved final questionnaires were programmed for computer-based telephone data collection. For Wave 2, a total of 700 businesses participated in the survey, from which 200 were “Retail Only”. As for Wave 1, 670 businesses participated in the survey, from which 300 were “Retail Only”. Most of the results in this report are based on businesses that are not exclusively retailers (Wave 2, n=500; Wave 1, n=370) as the key target audience are food businesses that import or prepare food for export or to be sent across provincial or territorial boundaries.
- Data collection for Wave 2 occurred between February 4, 2019, and March 1, 2019. Wave 1 data collection occurred between October 24 and November 9, 2018.

- The margin of error of this sample size is +/- 3.8%, 19 times out of 20. The data was weighted according to the population counts per industry vertical and province as per InfoCanada information.
- This study saw a response rate of 14% across the entire sample in Wave 1 and of 17% in Wave 2.

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Contract Amount (including HST): \$112,926.55

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Detailed Results

Research Purpose and Objectives

As part of the modern regulatory tool kit, the Canadian Food Inspection Agency (CFIA) combined 14 food safety regulations into the *New Safe Food for Canadians Regulations (SFCR)*. The regulations were published in June of 2018 and came into force January 15, 2019.

Results from the 2017-2018 public opinion research show that, as a whole, food businesses are aware of CFIA and are confident in their ability to meet their regulatory requirements. Participants tended to be more satisfied with CFIA if they had recent contact with them, and they are seen as a fairly reasonable and helpful regulator. The My CFIA service had a low awareness, but participants showed interest in it as a time-saving way to interact with CFIA, as most concerns stemmed from difficulty finding relevant information. Knowledge of the name SFCR was limited, or at least the title was not well known. Participants showed more knowledge about specific requirements than the Act itself, perhaps because many food businesses already participated in programs (such as Global Food Safety Initiative) that have some requirements similar to the SFCR. However, there still remains demand for faster answers and clear information regarding food safety and regulation requirements.

The new CFIA regulations affect many companies who previously were not regulated by CFIA. These companies will need to be made aware of the tools and services the Agency offers to help them comply with regulatory obligations.

CFIA requested public opinion research primarily to obtain insights on the food industry's views towards their food safety and food safety regulations in Canada, with a focus on small food businesses, food importers and exporters. This was done through a survey with businesses before the SFCR came into force (Wave 1), and a survey with businesses after the SFCR came into force (Wave 2). Specifically, CFIA wanted to gain a better understanding of awareness, motivations, perceptions and attitudes towards the following:

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Summary of Findings

The research results presented in this report are often based on one of two different segments:

- Select questions were asked exclusively to “Retail-only businesses” in the food industry – these are businesses that self-identified as only selling product to consumers and not importing, preparing food for export or to move across provincial boundaries. These businesses do need to meet traceability requirements under SFCR.
- Other study results focus exclusively on food industry businesses that conduct at least more than one activity that has requirements under SFCR other than just retail – these are referred to as “businesses not exclusively in retail” in this report.

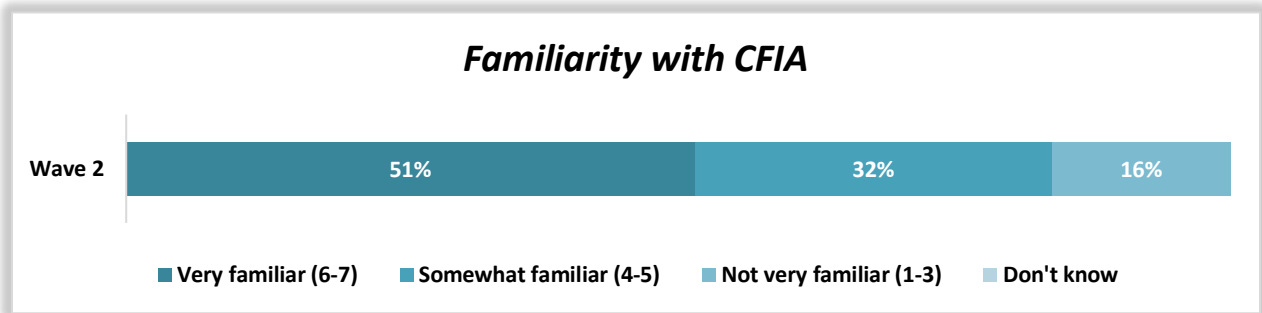
Due to the diversity of respondents and the requirement to understand multiple views, not all questions applied to every respondent. Information on the respondents for any specific question can be found in the footer of graphs and data tables presented in this report.

Some displayed results may not add to 100%. This is either due to rounding, because the results are based on questions that allowed multiple mentions or, in very rare instances, because certain response categories were not shown to improve the legibility of certain graphs or data tables.

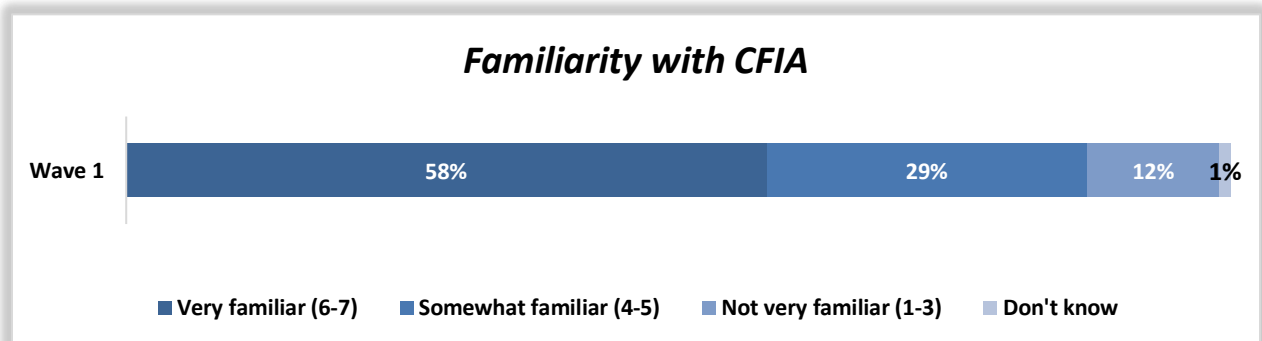
When data tables are presented, the green squares indicate that the result is statistically significantly different from results in other columns.

Awareness of CFIA and the Safe Food for Canadians Regulations

Over three quarters of businesses are at least somewhat familiar with CFIA. More specifically, 51% would rate their level of familiarity either a 6 or a 7 on a 7-point scale (where 1 meant not at all familiar and 7 meant very familiar). Another 32% would consider themselves somewhat familiar (a rating of 4 or 5) and 16% feel they are not very familiar (a rating of 1 to 3). Familiarity seems slightly lower in Wave 2 compared to Wave 1 (83% vs. 87% giving a rating from 4 to 7), although it should be noted that the difference is not statistically significant.



B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: Businesses not exclusively in retail, n=500.



B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: Businesses not exclusively in retail, n=370.

By looking at the results from the most recent wave of surveys, businesses in the processor and manufacturer segment and those in the wholesaler and distributor segment were the most familiar with CFIA (65% and 63% respectively), followed by those in agriculture (52%) and then those in retail, among whom one-quarter (32%) positioned their level of familiarity at the lower end of the scale (from a 1 to a 3). Results also reveal that familiarity with CFIA increases with the size of the company, ranging from 36% in the micro segment rating their familiarity either a 6 or a 7, up to 73% among large businesses.

These results are similar from Wave 1 to Wave 2.

WAVE 2 - FAMILIARITY WITH CFIA									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/Manufacturer (n=198)	Wholesaler/Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Very familiar (6-7)	51%	52%	65%	63%	32%	36%	44%	55%	73%
Somewhat familiar (4-5)	32%	31%	23%	23%	46%	43%	33%	30%	23%
Not very familiar (1-3)	16%	16%	12%	13%	22%	21%	21%	15%	4%
Don't know	<1%	-	-	2%	-	-	2%	-	-

B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - FAMILIARITY WITH CFIA									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/Manufacturer (n=170)	Wholesaler/Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Very familiar (6-7)	58%	53%	69%	64%	40%	38%	56%	65%	78%
Somewhat familiar (4-5)	29%	32%	24%	29%	34%	41%	26%	26%	22%
Not very familiar (1-3)	12%	13%	7%	6%	25%	16%	18%	9%	-
Don't know	1%	2%	-	1%	1%	4%	-	-	-

B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: Businesses not exclusively in retail, Wave 1, n=370.

From a regional perspective, and as observed in Wave 1, familiarity is highest in Atlantic Canada (73%) and the lowest in Quebec (39%), while results in Ontario and in Western Canada are fairly similar.

WAVE 2 - FAMILIARITY WITH CFIA					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Very familiar (6-7)	51%	73%	39%	53%	52%
Somewhat familiar (4-5)	32%	21%	39%	33%	29%
Not very familiar (1-3)	16%	6%	21%	13%	19%
Don't know	<1%	-	1%	1%	-

B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: Businesses not exclusively in retail, n=500.

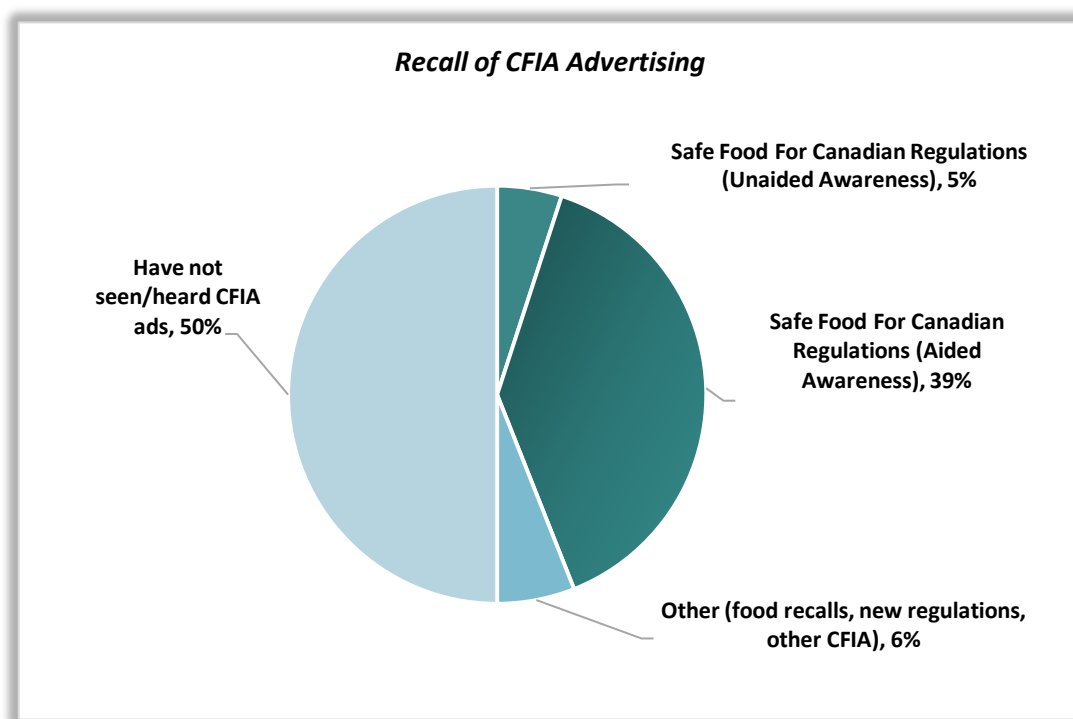
WAVE 1 - FAMILIARITY WITH CFIA					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Very familiar (6-7)	58%	82%	36%	65%	56%
Somewhat familiar (4-5)	29%	16%	46%	24%	29%
Not very familiar (1-3)	12%	2%	16%	11%	14%
Don't know	1%	-	2%	-	2%

B1: On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA? Base: Businesses not exclusively in retail, n=370.

Recall of CFIA Advertising

Respondents were asked if they had heard, seen or read any advertisements related to CFIA in the three to four weeks prior to participating in the survey. In order to explore unaided awareness of the *Safe Food for Canadians Regulations* through advertising, those who had been exposed to CFIA advertisements were asked what they remembered from the ads. Respondents who did not mention the SFCR spontaneously as well as those who said not remembering being exposed to CFIA advertising were asked specifically if they had heard, seen or read something about the new regulations.

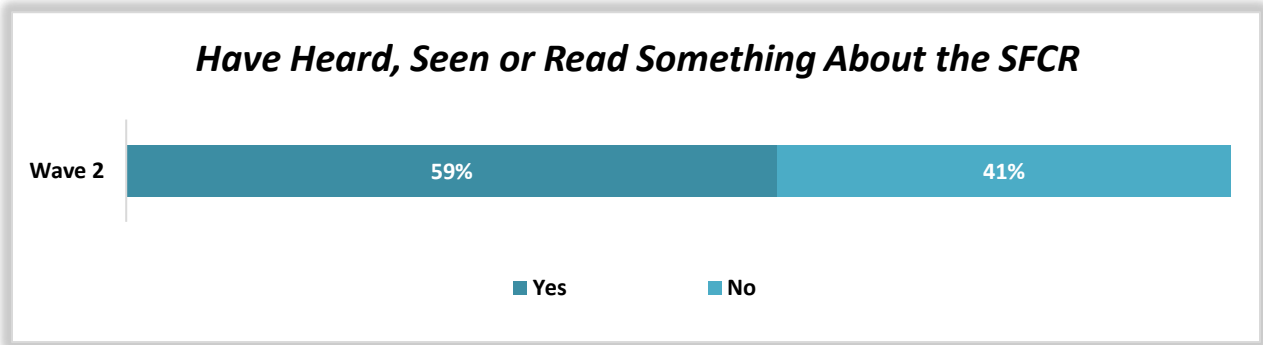
Results across all businesses interviewed during Wave 2 reveal that half (50%) recall hearing, seeing or reading advertisement from CFIA. This includes 5% of respondents who remembered SFCR spontaneously (unaided awareness), 39% who remembered SFCR when asked specifically about it, and 6% who remember other CFIA ads but not specific to SFCR. The graphic below shows the distribution of CFIA advertising awareness among all respondents.



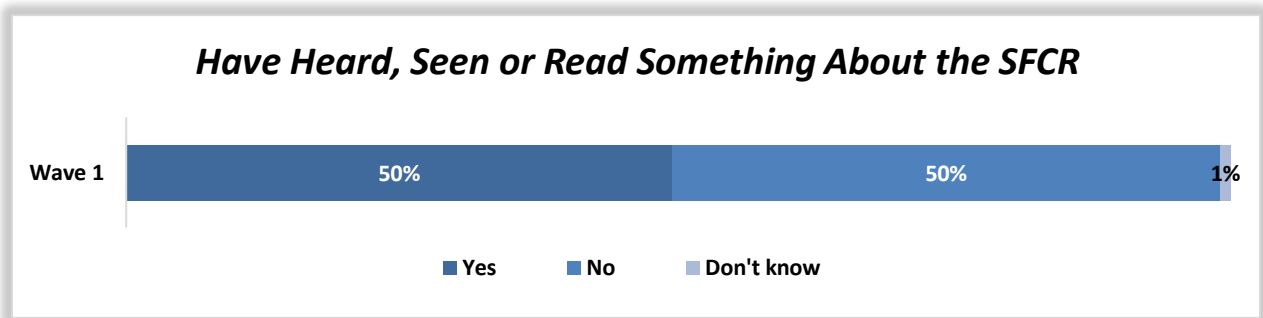
B1a: Over the past three to four weeks, have you seen, read or heard any advertising from the Canadian Food Inspection Agency? B1b. Thinking specifically about the ad or ads that come to mind, what do you remember about the ads. B2. Have you heard, seen or read anything about the Safe Food for Canadians Regulations, which introduces new requirements for food safety and came into force January 15, 2019? Base: All Respondents, Wave 2: n=700.

Other mentions among respondents who remembered seeing CFIA advertisements include general mentions about safe food new regulations, recall information, or other CFIA programs.

In Wave 1, businesses not only in retail were asked specifically if they had heard, seen or read something about the SFCR. When comparing to the results obtained in Wave 2 from businesses not only in retail, there is an increase from 50% to 59%.



B1b. Thinking specifically about the ad or ads that come to mind, what do you remember about the ads. B2: Have you heard, seen or read anything about the Safe Food for Canadians Regulations, which introduces new requirements for food safety and comes into force January 15, 2019? Base: Businesses not only in retail, n=500.



B2: Have you heard, seen or read anything about the Safe Food for Canadians Regulations, which introduces new requirements for food safety and comes into force January 15, 2019? Base: Businesses not only in retail, n=370.

Sub-group trends related to aided awareness of the SFCR are similar to those related to familiarity with CFIA overall. Results show relatively stronger awareness of the SFCR among processors and manufacturers (77%), followed by businesses in agriculture (47%), wholesalers and distributors (47%) and finally, among those in retail (40%).

Awareness of the SFCR generally is greater among large businesses (44%). There are no significant differences from a regional perspective.

WAVE 2 - SEEN, READ OR HEARD ANY ADVERTISING ABOUT SFCR									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Yes	59%	61%	80%	60%	43%	41%	53%	68%	73%
No	41%	39%	20%	40%	57%	59%	47%	32%	27%
Don't know	<1%	-	<1%	-	-	-	-	<1%	-

B1b. Thinking specifically about the ad or ads that come to mind, what do you remember about the ads? B2: Have you heard, seen or read anything about the Safe Food for Canadians Regulations, which introduces new requirements for food safety and comes into force January 15, 2019? Base: in Businesses not exclusively in retail indicating seeing ads about SFCR at B1b, n=500.

WAVE 2 - SEEN, READ OR HEARD ANY ADVERTISING ABOUT SFCR					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Yes	59%	66%	54%	60%	60%
No	41%	34%	46%	40%	49%
Don't know	<1%	-	-	-	<1%

B1b. Thinking specifically about the ad or ads that come to mind, what do you remember about the ads? B2: Have you heard, seen or read anything about the Safe Food for Canadians Regulations, which introduces new requirements for food safety and comes into force January 15, 2019? Base: in Businesses not exclusively in retail indicating seeing ads about SFCR at B1b, n=500.

WAVE 1 - SAFE FOOD FOR CANADIANS REGULATIONS AWARENESS									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Yes	50%	43%	73%	49%	26%	40%	36%	57%	82%
No	50%	57%	26%	51%	73%	58%	63%	43%	18%
Don't know	1%	-	1%	-	1%	1%	1%	-	-

B2: Have you heard, seen or read anything about the Safe Food for Canadians Regulations, which introduces new requirements for food safety and comes into force January 15, 2019? Base: Businesses not exclusively in retail, n=370.

WAVE 1 - SAFE FOOD FOR CANADIANS REGULATIONS AWARENESS					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Yes	50%	57%	36%	56%	47%
No	50%	43%	64%	43%	52%
Don't know	1%	-	-	1%	1%

B2: Have you heard, seen or read anything about the Safe Food for Canadians Regulations, which introduces new requirements for food safety and comes into force January 15, 2019? Base: Businesses not exclusively in retail, n=370.

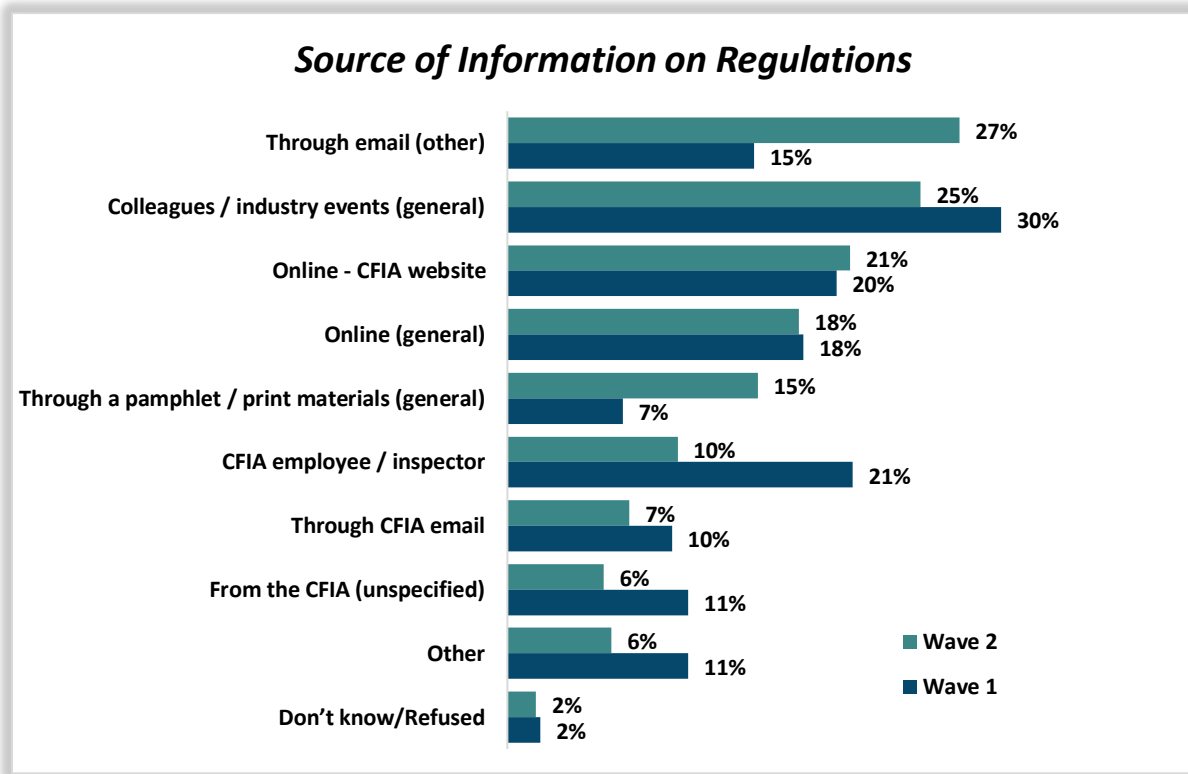
WAVE 2 – WHAT YOU REMEMBER ABOUT THE ADVERTISEMENTS									
		Industry Sector				Company Size			
	Total (n=215)	Agriculture (n=38)	Processor/ Manufacturer (n=96)	Wholesaler/ Distributor (n=42)	Retailer (n=39)	Micro (n=43)	Small (n=36)	Medium (n=98)	Large (n=37)
Safe Food or new regulations/ rule general mention	24%	30%	30%	33%	15%	27%	18%	27%	19%
Safe Food for Canadians Regulations (SFCR) specific mention	21%	21%	30%	20%	15%	19%	12%	21%	37%
Recall information	14%	14%	12%	17%	13%	10%	18%	13%	16%
Other CFIA program	6%	6%	8%	10%	3%	5%	6%	5%	7%
Other	13%	6%	10%	13%	17%	17%	7%	16%	5%
Don't know/Can't Recall	22%	23%	9%	6%	38%	22%	39%	18%	15%

B1b: Thinking specifically about the ad or ads that come to mind, what do you remember about the ads? Base: Respondents who have seen, read or heard advertising from CFIA, Wave 2, n=215.

WAVE 2 – WHAT YOU REMEMBER ABOUT THE ADVERTISEMENTS					
		Region			
	Total (n=215)	Atlantic (n=23)	Quebec (n=66)	Ontario (n=46)	West (n=80)
Safe Food or new regulations/ rule general mention	24%	12%	26%	29%	22%
Safe Food for Canadians Regulations (SFCR) specific mention	21%	22%	18%	23%	21%
Recall information	14%	40%	12%	13%	9%
Other CFIA program	6%	5%	3%	7%	7%
Other	13%	14%	10%	4%	22%
Don't know/Can't Recall	22%	7%	32%	23%	20%

B1b: Thinking specifically about the ad or ads that come to mind, what do you remember about the ads? Base: Respondents who have seen, read or heard advertising from CFIA, Wave 2, n=215.

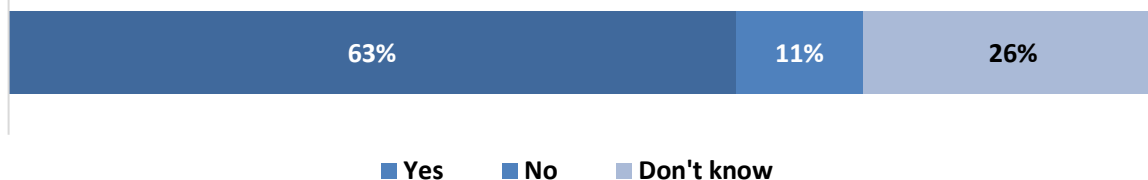
Among those having heard, seen or read something about SFCR who are in a business not exclusively in retail (59% of respondents), the most common sources were email (27%), colleagues and industry events (25%), the CFIA website (21%), followed by a general, unspecified online source (18%). Recall of this sort of information is often vague for respondents so it is not uncommon to see various “general” responses such as “online (general)”, email, a pamphlet, etc. In Wave 1, among those having heard, seen or read something about SFCR who are in a business not exclusively in retail (50% of respondents), the most common sources were colleagues and industry events (30%), a CFIA employee or inspector (21%), the CFIA website (20%), followed by an online general source (18%).



B2A: Where did you hear, see or read about the regulations? Base: Businesses not exclusively in retail that have heard of Safe Food for Canadians Regulations, Wave 2, n=324, Wave 1, n=204.

Irrespective of whether they had seen, read or heard anything about the new regulations, in Wave 1 businesses were asked if they thought the new regulations would apply to their business. A majority (63%) of businesses believed the new regulations would apply to their business, which suggests that many businesses assume the new regulations apply to their business even if they have not heard about them. One in ten believed the regulations would not apply to their business while 26% did not know.

Perceived Relevance of New Regulations



B3: As far as you know, do you think the new Safe Food for Canadians Regulations will apply to your business? Base: Businesses not exclusively in retail, Wave 1, n=370.

Across the various sub-groups, results (from Wave 1) reveal that perceived relevance is highest among processors and manufacturers (74%) and lowest among businesses in agriculture (51%) and retail (55%). Perceived relevance also increased with the size of the business, ranging from 49% among micro businesses, to 83% among large ones. Smaller businesses were more prone to believe that the new regulations would not apply to their business (rather than simply not knowing). Regionally, perceived relevance was highest in Atlantic Canada (77%) and lowest in Quebec (56%), with results in Ontario and Western Canada fairly similar. Additionally, 22% of those in Quebec did not believe the new regulations would apply to their business.

WAVE 1 - PERCEIVED RELEVANCE OF NEW REGULATIONS									
	Total (n=370)	Industry Sector				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Yes	63%	51%	74%	63%	55%	49%	62%	65%	83%
No	11%	16%	6%	11%	14%	24%	10%	7%	2%
Don't know	26%	33%	20%	26%	31%	27%	28%	27%	15%

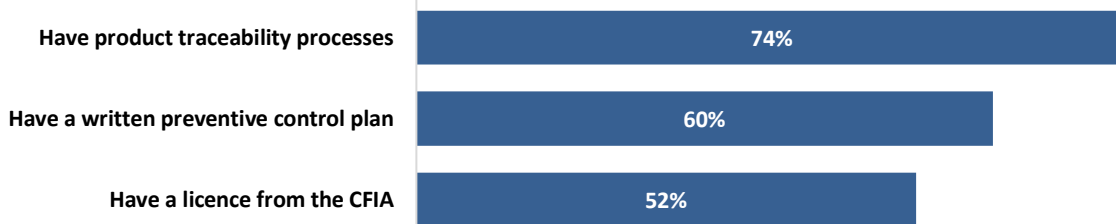
B3: As far as you know, do you think the new Safe Food for Canadians Regulations will apply to your business? Base: Businesses not exclusively in retail, Wave 1, n=370.

WAVE 1 - PERCEIVED RELEVANCE OF NEW REGULATIONS					
	Total (n=370)	Region			
		Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Yes	63%	77%	56%	65%	60%
No	11%	-	22%	7%	12%
Don't know	26%	23%	22%	28%	27%

B3: As far as you know, do you think the new Safe Food for Canadians Regulations will apply to your business? Base: Businesses not exclusively in retail, Wave 1, n=370.

In Wave 1, when specifically asked about three requirements under the new regulations, results reveal that nearly three quarters (74%) of businesses were aware that the new regulations required regulated businesses to have product traceability processes, 60% were aware that they require a written preventive control plan and 52% were aware that they require a licence from CFIA.

Awareness of Safe Food for Canadians Regulations Requirements



B4: Were you aware that the proposed Safe Food for Canadians Regulations require most businesses regulated by CFIA to: Have a licence from the CFIA. / B5: Have a written preventive control plan. / B6: Have product traceability processes. Base: Businesses not exclusively in retail, Wave 1, n=370.

Awareness of these three requirements was consistently lower among businesses in the retail sector and became progressively lower as the size of the business decreased. Furthermore, the requirement for regulated businesses to have a licence from CFIA was also relatively lower among businesses in the agriculture segment (46%) although not as low as in the retail segment (33%).

WAVE 1 - AWARENESS OF SAFE FOOD FOR CANADIANS REGULATIONS REQUIREMENTS									
	Total (n=370)	Industry Sector				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Have a licence from CFIA									
Yes	52%	46%	69%	55%	33%	29%	46%	62%	78%
No	43%	46%	27%	37%	64%	68%	45%	34%	19%
Don't know	5%	7%	4%	8%	3%	3%	10%	4%	3%
Have a written preventive control plan									
Yes	60%	63%	76%	64%	36%	34%	49%	74%	90%
No	35%	33%	21%	31%	56%	63%	39%	24%	8%
Don't know	5%	3%	3%	4%	9%	3%	12%	2%	1%
Have product traceability processes									
Yes	74%	81%	87%	75%	50%	67%	63%	79%	94%
No	25%	19%	12%	24%	45%	32%	33%	20%	6%
Don't know	2%	-	1%	1%	4%	1%	4%	1%	-

B4: Were you aware that the proposed Safe Food for Canadians Regulations require most businesses regulated by CFIA to: Have a licence from the CFIA. / B5: Have a written preventive control plan. / B6: Have product traceability processes. Base: Businesses not exclusively in retail, Wave 1, n=370.

From a regional perspective, awareness of each of the three requirements was consistently highest in Atlantic Canada and, with the exception of the requirement to have product traceability processes, awareness was consistently lowest in Quebec.

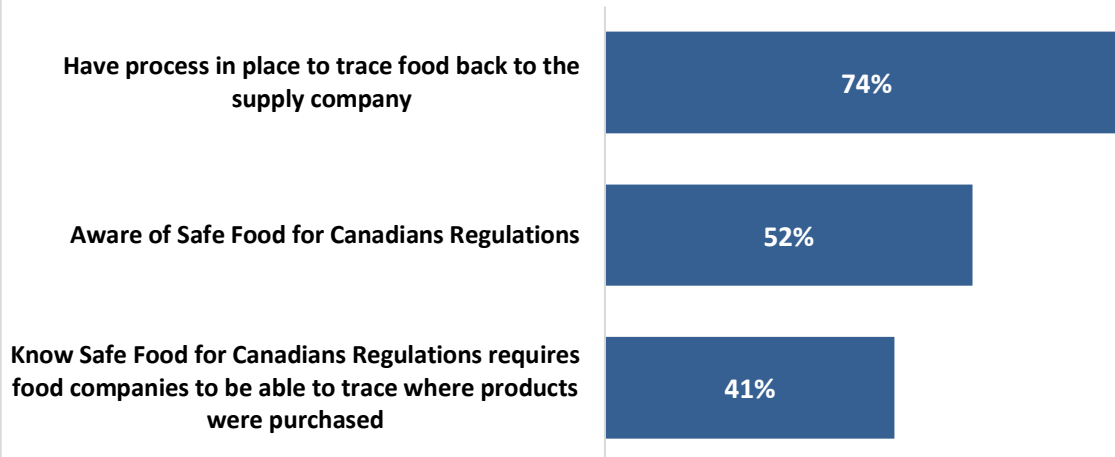
WAVE 1 - AWARENESS OF SAFE FOOD FOR CANADIANS REGULATIONS REQUIREMENTS						
	Region					
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)	
Have a licence from CFIA						
Yes	52%	71%	44%	55%	49%	
No	43%	27%	50%	40%	44%	
Don't know	5%	2%	7%	4%	6%	
Have a written preventive control plan						
Yes	60%	80%	51%	63%	59%	
No	35%	19%	42%	33%	36%	
Don't know	5%	1%	7%	4%	6%	
Have product traceability processes						
Yes	74%	84%	77%	76%	67%	
No	25%	16%	19%	24%	30%	
Don't know	2%	-	4%	-	3%	

B4: Were you aware that the proposed Safe Food for Canadians Regulations require most businesses regulated by CFIA to: Have a licence from the CFIA. / B5: Have a written preventive control plan. / B6: Have product traceability processes. Base: Businesses not exclusively in retail, Wave 1, n=370.

In Wave 1, separate questions related to the traceability of food products and to the SFCR were dedicated to businesses that self-identified as “retail-only” businesses. Results from these questions reveal the following:

- Three-quarters of retailers (74%) have a process in place to trace food back to the company that supplied it.
- Roughly half (52%) are aware of the *Safe Food for Canadians Regulations*.
- About four in ten (41%) claim to be aware of the new regulation’s requirement for most food companies to be able to trace where their food products were purchased.

Traceability Processes and SFCR Awareness Among Businesses Exclusively in Retail



S4: Do you have a process in place that will allow you to trace back your food to the company that supplied it? S4a: Have you heard of the Safe Food for Canadians Regulations? S4b: Do you know that the Safe Food for Canadians Regulations that come into force January 15, 2019 require most food companies to be able to trace where their food products were purchased? Base: Businesses exclusively in retail, Wave 1, n=300.

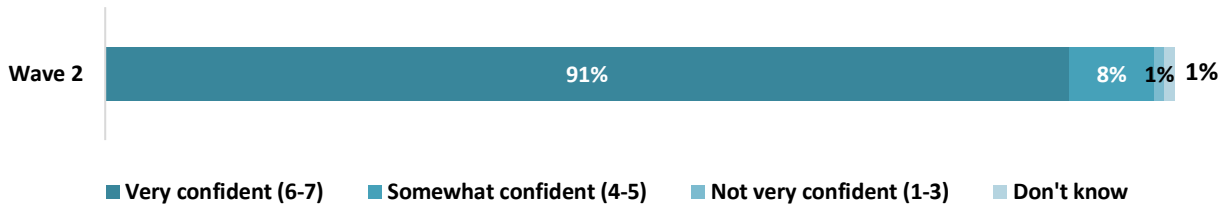
WAVE 1	HAS A PROCESSES TO TRACE BACK FOOD	HEARD OF SAFE FOOD FOR CANADIANS REGULATIONS	UNDERSTANDS TRACEABILITY REQUIREMENTS UNDER NEW SFCR
Yes	74%	52%	41%
No	24%	42%	58%
Not sure	1%	6%	-
Don't know/Refused	1%	-	1%

S4: Do you have a process in place that will allow you to trace back your food to the company that supplied it? S4a: Have you heard of the Safe Food for Canadians Regulations? S4b: Do you know that the Safe Food for Canadians Regulations that come into force January 15, 2019 require most food companies to be able to trace where their food products were purchased? Base: Businesses exclusively in retail, Wave 1, n=300.

Confidence in Meeting Food Safety Regulations

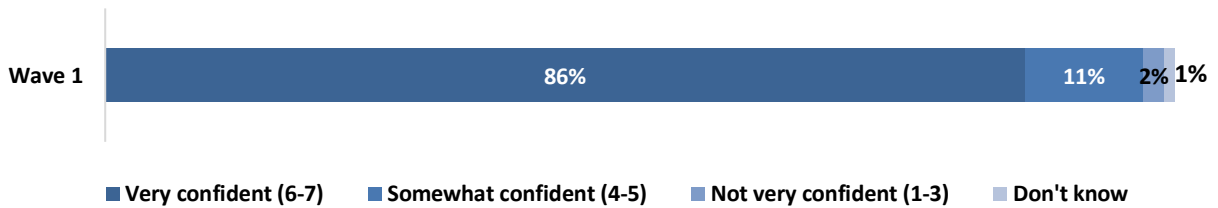
The majority (91%) of businesses felt very confident that they would meet food safety regulations and requirements if they were to be inspected. Among the remaining respondents, 8% felt somewhat confident (gave a rating of 4 or 5 on a 7-point scale) and only 1% were not very confident (gave a rating of 1 to 3). This is a statistically significant increase from 86% of businesses feeling very confident in meeting food safety regulations and requirements in Wave 1. Virtually all large companies are very confident (99%), while medium-sized companies are the most likely to be somewhat confident (10%). Businesses in Quebec are the most likely to be very confident. There were no statistically significant differences across industry verticals.

Confidence in Meeting Food Safety Regulations



A1: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: Businesses not exclusively in retail, Wave 2, n=500.

Confidence in Meeting Food Safety Regulations



G5: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: Businesses not exclusively in retail, Wave 1, n=370.

WAVE 2 - CONFIDENCE IN MEETING FOOD SAFETY REGULATIONS									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Very confident (6-7)	91%	89%	93%	90%	90%	90%	91%	89%	99%
Somewhat confident (4-5)	8%	10%	7%	5%	10%	8%	7%	10%	1%
Not very confident (1-3)	1%	-	<1%	2%	-	1%	<1%	1%	-
Don't know	1%	2%	<1%	3%	-	1%	2%	<1%	-

A1: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 2 - CONFIDENCE IN MEETING FOOD SAFETY REGULATIONS					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Very confident (6-7)	91%	96%	97%	86%	91%
Somewhat confident (4-5)	8%	4%	3%	11%	8%
Not very confident (1-3)	1%	-	<1%	1%	-
Don't know	1%	-	-	2%	1%

A1: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 – CONFIDENCE IN MEETING FOOD SAFETY REGULATIONS									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Very confident (6-7)	86%	84%	90%	83%	84%	86%	76%	90%	94%
Somewhat confident (4-5)	11%	10%	7%	14%	13%	6%	22%	7%	6%
Not very confident (1-3)	2%	6%	1%	3%	1%	6%	1%	2%	-
Don't know	1%	-	2%	-	1%	2%	1%	1%	-

G5: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: Businesses not exclusively in retail, n=370.

WAVE 1 – CONFIDENCE IN MEETING FOOD SAFETY REGULATIONS					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Very confident (6-7)	86%	93%	85%	84%	87%
Somewhat confident (4-5)	11%	7%	13%	11%	10%
Not very confident (1-3)	2%	-	2%	3%	2%
Don't know	1%	-	-	1%	1%

G5: If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident. Base: Businesses not exclusively in retail, Wave 1, n=370.

Those very confident that they would meet regulations and requirements if they were inspected today attribute this confidence mostly to the fact that they believe they follow the rules and /or comply with regulations (33%). Another 28% are confident because they are inspected regularly / have received positive feedback, and 11% feel they make an effort and try to meet food safety regulations. Response patterns are quite similar when we consider the confidence drivers among those who provided lower confidence ratings.

WAVE 2 – REASONS FOR RATING			
AMONG BUSINESSES VERY CONFIDENT (CONFIDENCE RATING OF 6 OR 7)		AMONG BUSINESSES SOMEWHAT CONFIDENT OR NOT VERY CONFIDENT (CONFIDENCE RATING OF 1 TO 5)	
			n=37
We follow the rules / comply with regulations	33%	We make an effort / try to meet food safety regulations	28%
We are inspected regularly / have received positive feedback	28%	We are inspected regularly / have received positive feedback	19%
We make an effort / try to meet food safety regulations	11%	We follow the rules / comply with regulations	11%
We have a full food safety program in place	9%	We only carry low-risk products	8%
We have recently passed an audit	5%	We keep everything clean / organized	4%
We keep everything clean / organized	4%	We have a full food safety program in place	4%
We have never had an issue in the past	2%	Other	5%
We only carry low-risk products	2%	Don't know/ Refused	19%
We keep our documentation / paperwork	2%		
Other	1%		
Don't know/ Refused	2%		

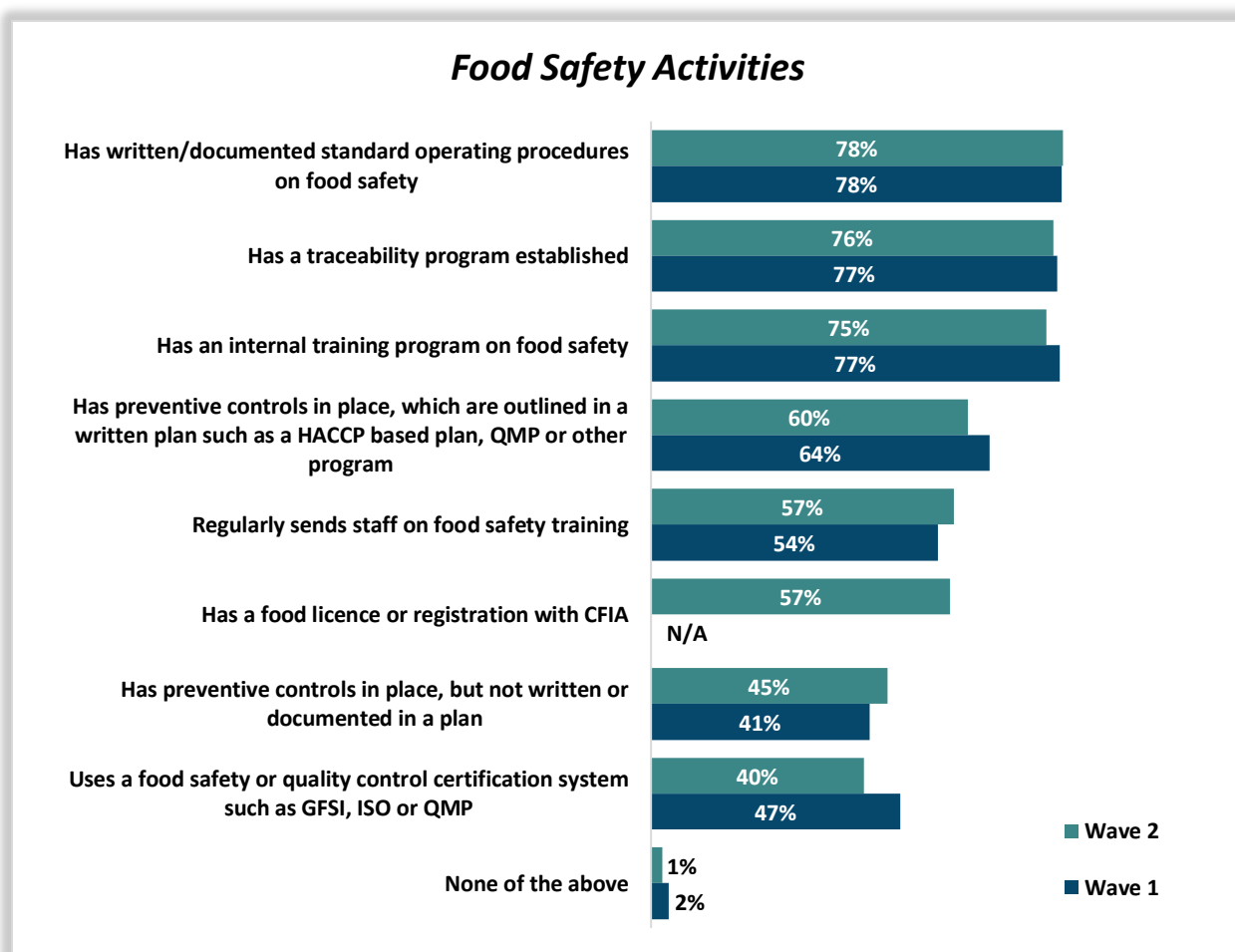
A2: Please expand on why you provided that answer. Base: Businesses not exclusively in retail who provided a score in A1, Wave 2 n=495.

WAVE 1 – REASONS FOR RATING			
AMONG BUSINESSES VERY CONFIDENT (CONFIDENCE RATING OF 6 OR 7)		AMONG BUSINESSES SOMEWHAT CONFIDENT OR NOT VERY CONFIDENT (CONFIDENCE RATING OF 1 TO 5)	
	n=324		n=43
We follow the rules / comply with regulations	55%	We follow the rules / comply with regulations	62%
We keep everything clean / organized	27%	We keep everything clean / organized	19%
Inspected regularly / have received positive feedback	16%	We have a full food safety program in place	7%
We have a full food safety program in place	12%	We keep our documentation / paperwork	5%
We have recently passed an audit	11%	Inspected regularly / have received positive feedback	5%
We have never had an issue in the past	9%	We have recently passed an audit	4%
We keep our documentation / paperwork	6%	We only carry low-risk products	2%
We only carry low-risk products	4%	Other	4%
Other	1%	Don't know/ Refused	16%
Don't know/ Refused	4%		

G6: Please expand on why you provided that answer. Base: Businesses not exclusively in retail who provided a score in G2, Wave 1, n=367.

Commonly Conducted Food Safety Activities

A list of various food safety-related measures and activities was presented to survey respondents in both waves and they were asked to note the ones that apply to their company. Results from this revealed that the most popular food safety activities include documenting standard operating procedures on food safety, establishing a traceability program and internal training programs on food safety. Each of these was noted by over three-quarters of businesses in both waves. Additionally, 60% of businesses have preventive controls in place, which are outlined in a written plan. Over half of businesses regularly send staff on food safety training (57%) or have a food licence or registration with CFIA. Slightly fewer have preventive controls in place not written or documented in a plan (45%), or use a food safety or quality control certification system (40%). Results from Wave 1 are quite similar to those in Wave 2.



A3: Which of the following, if any, applies at your company? Base: Businesses not exclusively in retail, Wave 2, n=500, Wave 1, n=370.

Results are dependent on the industry sector and frequently based on the size of the company.

From an industry sector perspective, businesses whose primary activity is retail or wholesale/distribution are the least likely to have food safety measures in place. For retailers, the exceptions are having an internal training program on food safety, regularly sending staff on food safety training and having preventing

controls without being written or documented in a plan. Retailers stand out from the other sectors in terms of being more likely to regularly send staff on food safety training. Another noteworthy trend from an industry sector perspective reveals the incidence for nearly each of the measures is highest among processors and manufacturers. These businesses are more likely to:

have an internal training program on food safety (91%); have preventive controls in place outlined in a written plan such as a HACCP based plan, QMP or other program (80%); regularly send staff on food safety training (63%); use a food safety or quality control certification system such as GFSI, ISO or QMP (59%)

From a company size perspective, the larger the business, the more likely they are to have most of the measures in place. As seen below, the incidence of six of the measures exceeds 80% among large businesses. Conversely, the smaller the business, the more likely they are to have preventive controls in place but not written or documented in a plan – this measure reaches 56% among micro businesses. Furthermore, 6% of micro businesses indicate they do not have any of the measures in place at all.

Trends per industry vertical and company size remain similar in Wave 2 compared to those observed in Wave 1.

WAVE 2 - FOOD SAFETY ACTIVITIES									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Has written/documented standard operating procedures on food safety	78%	86%	84%	73%	74%	60%	72%	87%	92%
Has a traceability program established	76%	89%	87%	82%	60%	64%	81%	77%	85%
Has an internal training program on food safety	75%	77%	91%	64%	69%	58%	65%	86%	85%
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program	60%	66%	80%	62%	41%	42%	45%	67%	91%
Regularly sends staff on food safety training	57%	55%	63%	45%	62%	43%	47%	64%	76%
Has a food licence or registration with CFIA	57%	57%	62%	59%	51%	30%	54%	65%	80%
Has preventive controls in place, but not written or documented in a plan	45%	40%	37%	45%	51%	56%	47%	46%	20%
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	40%	58%	59%	36%	23%	18%	22%	50%	79%
None of the above	2%	2%	1%	4%	2%	6%	2%	<1%	-

A3: Which of the following, if any, applies at your company. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - FOOD SAFETY ACTIVITIES									
	Total (n=370)	Industry Sector				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Has written/ documented standard operating procedures on food safety	78%	82%	88%	80%	61%	56%	67%	91%	96%
Has an internal training program on food safety	77%	69%	90%	68%	76%	53%	74%	87%	92%
Has a traceability program established	77%	85%	88%	84%	50%	64%	63%	87%	96%
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program	64%	72%	77%	63%	43%	38%	48%	82%	83%
Regularly sends staff on food safety training	54%	45%	70%	45%	50%	29%	46%	65%	86%
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	47%	54%	60%	45%	29%	29%	34%	57%	83%
Has preventive controls in place, but not written or documented in a plan	41%	34%	39%	40%	50%	48%	45%	38%	33%
Follows six sigma quality control	25%	25%	26%	25%	23%	16%	22%	29%	30%
None of the above	3%	5%	2%	3%	4%	14%	-	1%	4%

A3: Which of the following, if any, applies at your company. Base: Businesses not exclusively in retail, Wave 1, n=370.

From a regional perspective, results suggest a lower level of adoption of the various measures in Quebec. The results on the previous page show that these are in fact two segments where the adoption of the various measures tends to be relatively lower.

Results also show that over three-quarters of the businesses in Atlantic Canada have adopted many of the measures listed, results that are higher than what is seen in the other regions. The adoption of the various measures is very consistent between businesses in Ontario and those in the West.

Results are also similar between Wave 2 and Wave 1.

WAVE 2 - FOOD SAFETY ACTIVITIES					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Has written/documented standard operating procedures on food safety	78%	93%	49%	89%	80%
Has a traceability program established	76%	94%	65%	80%	75%
Has an internal training program on food safety	75%	75%	73%	76%	74%
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program	60%	78%	47%	62%	62%
Regularly sends staff on food safety training	57%	55%	45%	68%	50%
Has a food licence or registration with CFIA	57%	81%	42%	54%	65%
Has preventive controls in place, but not written or documented in a plan	45%	41%	50%	45%	42%
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	40%	68%	33%	39%	42%
None of the above	2%	1%	7%	1%	1%

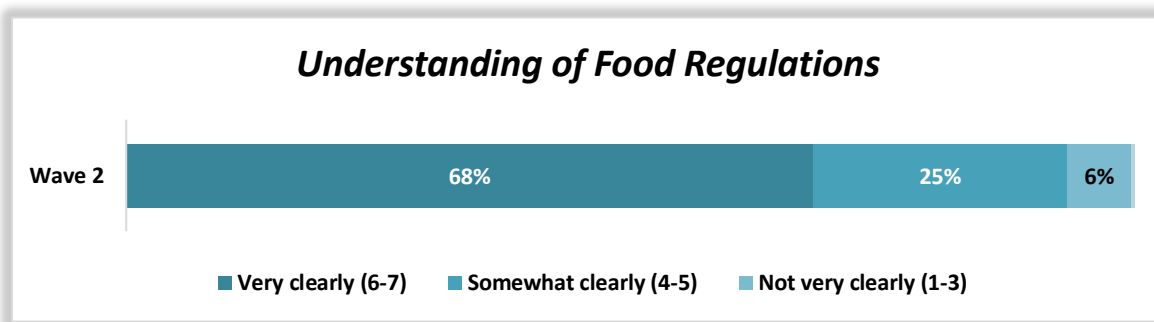
A3: Which of the following, if any, applies at your company. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - FOOD SAFETY ACTIVITIES					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Has written/ documented standard operating procedures on food safety	78%	88%	46%	84%	83%
Has an internal training program on food safety	77%	88%	72%	78%	77%
Has a traceability program established	77%	93%	60%	83%	75%
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program	64%	89%	39%	67%	67%
Regularly sends staff on food safety training	54%	78%	39%	51%	60%
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	47%	77%	19%	50%	51%
Has preventive controls in place, but not written or documented in a plan	41%	46%	53%	39%	38%
Follows six sigma quality control	25%	39%	14%	29%	23%
None of the above	3%	2%	8%	2%	3%

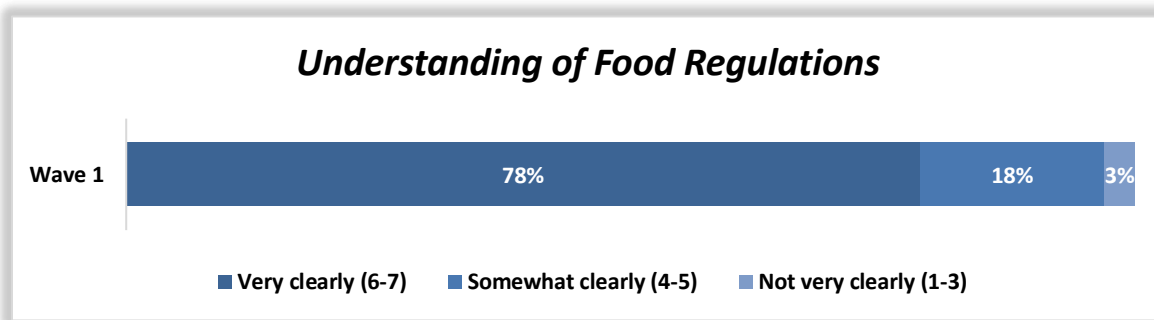
A3: Which of the following, if any, applies at your company. Base: Businesses not exclusively in retail, Wave 1, n=370.

Businesses not exclusively in retail were asked to rate their level of understanding of food regulations that apply to their foods. By using a 7-point scale, where 1 meant not at all and 7 meant very clearly, results reveal that in the second wave of the survey, 68% of businesses not exclusively in retail would rate their

understanding of the food safety regulations that apply to their foods a 6 or a 7. This is a lower rating compared to that observed in Wave 1 (78%). However, most of the remaining businesses (25% in Wave 2 and 18% in Wave 1) would give a rating of 4 or 5, which shows how there is a decrease from the “very clear” proportion and an increase to the “somewhat clearly” proportion from Wave 1 to Wave 2 – when combining the top scores provided, we can see the understanding of these regulations is clear to respondents in both waves (93% in Wave 2 and 96% in Wave 1).



B3: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: Businesses not exclusively in retail, Wave 2, n=500.



A2: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: Businesses not exclusively in retail, Wave 1, n=370.

Reported understanding of the food safety regulations that apply to their foods is stronger among processor/manufacturer businesses (74% selected a rating of 6 or 7). Understanding seems to wane as the size of the businesses decreases in Wave 1. As the tables below indicates, 90% of large businesses gave themselves a rating of 6 or 7 in Wave 1, a score that gradually drops to 69% among micro businesses. From a regional perspective, businesses in Atlantic Canada are more likely to report understanding the food safety regulations that apply to their foods.

WAVE 2 - UNDERSTANDING OF FOOD REGULATIONS									
	Industry Sector					Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Very clearly (6-7)	68%	72%	74%	60%	68%	68%	69%	67%	71%
Somewhat clearly (4-5)	25%	17%	20%	33%	26%	25%	26%	28%	18%
Not very clearly (1-3)	6%	10%	6%	6%	6%	7%	4%	5%	11%
Don't know	<1%	-	<1%	1%	-	-	1%	<1%	-

B2: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - UNDERSTANDING OF FOOD REGULATIONS									
	Industry Sector					Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Very clearly (6-7)	78%	84%	82%	79%	70%	69%	72%	85%	90%
Somewhat clearly (4-5)	18%	9%	16%	20%	25%	21%	26%	14%	10%
Not very clearly (1-3)	3%	7%	2%	2%	3%	9%	2%	1%	-
Don't know	<1%	-	-	-	1%	2%	-	-	-

A2: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: Businesses not exclusively in retail, Wave 1, n=370.

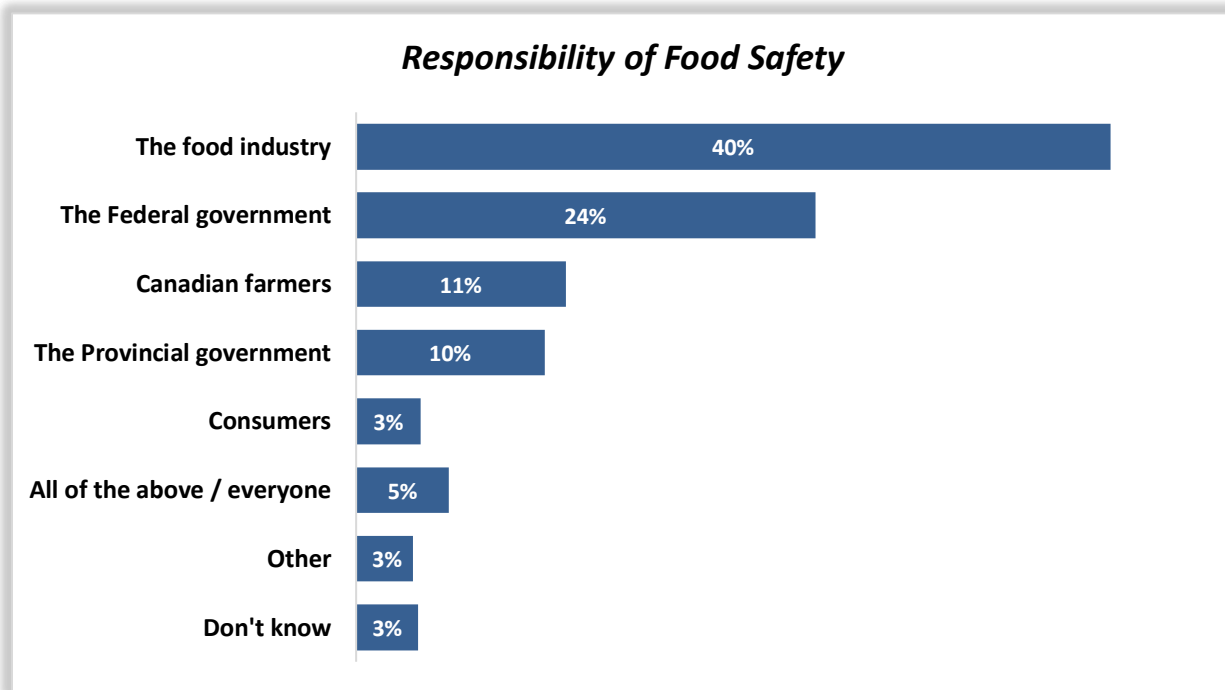
WAVE 2 - UNDERSTANDING OF FOOD REGULATIONS					
	Region				
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Very clearly (6-7)	68%	77%	70%	65%	69%
Somewhat clearly (4-5)	25%	17%	25%	26%	25%
Not very clearly (1-3)	6%	6%	4%	8%	6%
Don't know	<1%	-	<1%	1%	-

B2: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - UNDERSTANDING OF FOOD REGULATIONS					
	Region				
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Very clearly (6-7)	78%	90%	75%	82%	74%
Somewhat clearly (4-5)	18%	10%	23%	16%	20%
Not very clearly (1-3)	3%	-	3%	2%	4%
Don't know	<1%	-	-	-	1%

A2: On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods? Base: Businesses not exclusively in retail, Wave 1, n=370.

In Wave 1, businesses not exclusively in retail were asked who they believe is responsible for food safety in Canada. Results indicate nearly 2 in 5 businesses think it is the food industry that has the most responsibility to ensure food sold in Canada is safe. Another 24% believe it is the federal government, 11% believe it is Canadian farmers and 10% believe the provincial governments have the most responsibility.



A1: Thinking about food safety in general, who do you think has the most responsibility to ensure the food sold in Canada is safe. Is it... Base: Businesses not exclusively in retail, Wave1, n=370.

The attribution of responsibility does differ depending on the industry sector. For instance, a majority of those who identify as processors and manufacturers are inclined to believe that most of the responsibility falls on the shoulders of the food industry itself (57%).

The perception is fairly different among those in agriculture, among whom 40% believe most of the responsibility lies with Canadian farmers, followed by 30% who believe it is the food industry and 20% believe it is the federal government.

The picture is different still among retailers where a provincial government is more likely to be identified (20%), over one quarter believe it is the federal government (27%) and relatively few (at 24%) believe it is the food industry.

Most businesses that are primarily wholesalers and distributors either believe it is the food industry (40%) or the federal government (35%).

From a company size perspective, we can see that the larger the company, the more likely they are to believe that the food industry has the most responsibility.

There are not many regional differences – businesses in Atlantic Canada are much more likely to believe the food industry is primarily responsible.

WAVE 1 – RESPONSIBILITY OF FOOD SAFETY									
	Total (n=370)	Industry Sector				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
The food industry	40%	30%	57%	40%	24%	27%	34%	47%	55%
The federal government	24%	20%	16%	35%	27%	31%	23%	22%	26%
Canadian Farmers	11%	40%	3%	8%	6%	13%	10%	12%	7%
The Provincial government	10%	1%	7%	8%	20%	10%	16%	7%	-
Consumers	3%	1%	2%	3%	7%	4%	7%	2%	-
All of the above / everyone	5%	9%	6%	1%	6%	6%	4%	5%	5%
Other	3%	-	5%	2%	5%	5%	4%	2%	3%
Don't know	3%	-	3%	4%	5%	4%	3%	3%	3%

A1: Thinking about food safety in general, who do you think has the most responsibility to ensure the food sold in Canada is safe. Is it... Base: Businesses not exclusively in retail, Wave 1, n=370.

WAVE 1 – RESPONSIBILITY OF FOOD SAFETY					
	Total (n=370)	Region			
		Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
The food industry	39%	67%	33%	41%	38%
The federal government	24%	15%	24%	23%	28%
Canadian Farmers	11%	-	14%	14%	8%
The Provincial government	10%	10%	17%	7%	9%
Consumers	3%	3%	6%	2%	4%
All of the above / everyone	5%	4%	1%	5%	7%
Other	3%	-	4%	4%	2%
Don't know	3%	-	2%	4%	4%

A1: Thinking about food safety in general, who do you think has the most responsibility to ensure the food sold in Canada is safe. Is it... Base: Businesses not exclusively in retail, Wave 1, n=370.

Businesses not exclusively in retail from both waves of surveys were provided with three potential challenges that food businesses might encounter and then asked to select the one that, from their perspective, would be the biggest challenge. Just over two in five food businesses (45%) selected traceability of food products as the biggest food safety challenge. This was followed by written preventive controls (30%), and 16% selected licencing. In Wave 2, nearly 1 in 10 did not know which represented the biggest challenge for food businesses.



B7: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be... Base: Businesses not exclusively in retail, Wave 2, n=500, Wave 1, n=370.

In the most recent wave of surveys, traceability was still most likely to be considered the biggest challenge among businesses in the retail sector. Notably, businesses in the processor/manufacturer segment were split between traceability (37%) and written preventive controls (38%). The larger the company size, the greater the perceived challenge to have written preventive controls (only 22% for micro businesses compared to 41% for large businesses). These results are somewhat similar to those observed in Wave 1.

WAVE 2 - CHALLENGES FOR FOOD BUSINESSES									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/Manufacturer (n=198)	Wholesaler/Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Traceability of food products	45%	47%	37%	36%	56%	53%	47%	41%	42%
Written preventive controls	30%	30%	38%	36%	21%	22%	23%	36%	41%
Licencing	16%	16%	19%	18%	12%	15%	15%	18%	14%
Don't know	9%	7%	6%	10%	11%	10%	15%	6%	3%

B7: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be... Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - CHALLENGES FOR FOOD BUSINESSES									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/Manufacturer (n=170)	Wholesaler/Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Traceability of food products	42%	24%	36%	50%	52%	35%	42%	44%	45%

WAVE 1 - CHALLENGES FOR FOOD BUSINESSES									
	Total (n=370)	Industry Sector				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Written preventive controls	26%	25%	34%	24%	20%	24%	26%	26%	34%
Licencing	24%	41%	18%	19%	24%	28%	26%	22%	15%
None of the above	8%	9%	12%	7%	4%	14%	5%	8%	7%

B7: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be...
Base: Businesses not exclusively in retail, Wave 1, n=370.

From a regional perspective, traceability of food products was the most common challenge in all regions, especially among businesses in Quebec (54%) and in Ontario (49%). Written preventive controls was more likely to be a challenge among businesses in Atlantic Canada compared to businesses in other regions. In Wave 1, traceability was also the most common challenge in all regions, particularly in Quebec and Atlantic Canada.

WAVE 2 - CHALLENGES FOR FOOD BUSINESSES					
	Total (n=500)	Region			
		Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Traceability of food products	45%	26%	54%	49%	38%
Written preventive controls	30%	51%	27%	26%	35%
Licencing	16%	16%	10%	16%	19%
Don't know	9%	6%	9%	9%	9%

B7: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be...
Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - CHALLENGES FOR FOOD BUSINESSES					
	Total (n=370)	Region			
		Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Traceability of food products	42%	52%	49%	43%	36%
Written preventive controls	26%	26%	33%	22%	28%
Licencing	24%	13%	13%	29%	25%
None of the above	8%	9%	6%	7%	11%

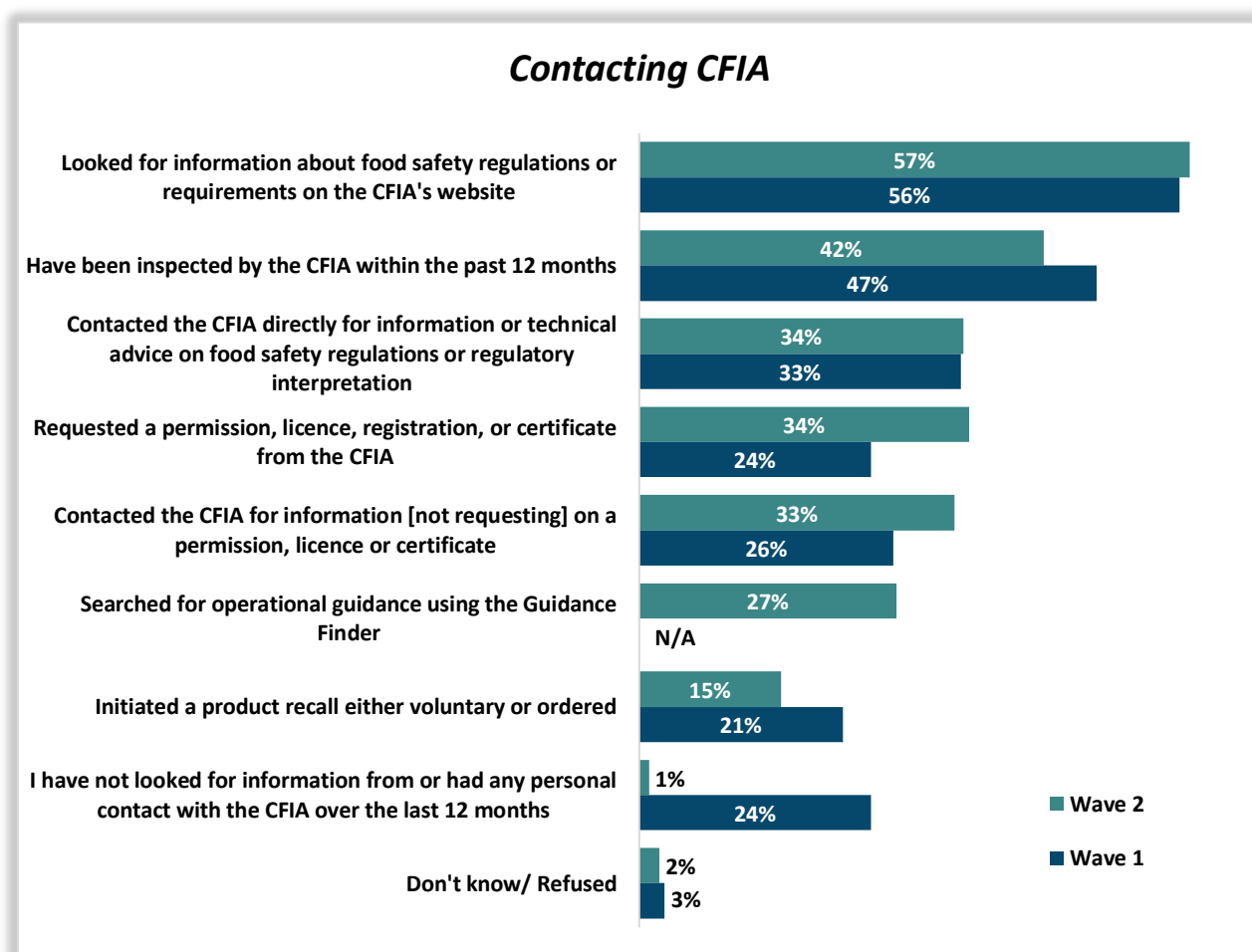
B7: From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be...
Base: Businesses not exclusively in retail, Wave 1, n=370.

Contact with CFIA

Based on results from Wave 2, over 7 in 10 (73%) businesses that are not exclusively in retail have had some sort of contact with CFIA over the past 12 months. The most common interaction with CFIA over the past 12 months was looking for information about food safety regulations or requirements on the CFIA's website (57%) while 42% claim to have been inspected, 34% contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, or requested a permission, licence, registration, or certificate from CFIA, and 33% contacted CFIA for information on (rather than requesting) a permission licence or certificate. Other results include:

- 27% searched for operational guidance using the Guidance Finder (which was not explored in Wave 1);
- 15% initiated a product recall either voluntarily or ordered.

These results are generally quite similar to those observed in Wave 1, except there are less businesses that have not looked for information from or had any personal contact with CFIA in the previous 12 months.



C1a: I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. Base: Businesses not exclusively in retail, Wave 2, n=500, Wave 1, n=370.

The most recent survey results reveal that most of these activities or types of contact with CFIA are more common among businesses in the processor and manufacturer segment and many are also more common among those in the wholesaler and distributor segment. Businesses in the retail segment are the least likely to have contact with CFIA, except for searching for operational guidance using the Guidance Finder (34%). Results also show that product recalls are more common among businesses in the wholesale/distributor segment (24%).

As well, the larger the company, the more likely they are to contact CFIA in many ways, except for searching for operational guidance using the Guidance Finder which seems to be more popular among smaller companies.

WAVE 2 - CONTACT WITH CFIA									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Looked for information about food safety regulations or requirements on the CFIA's website	57%	59%	77%	63%	38%	41%	51%	61%	79%
Have been inspected by CFIA within the past 12 months	42%	44%	53%	42%	33%	28%	30%	49%	63%
Requested a permission, licence, registration, or certificate from CFIA	34%	44%	50%	40%	15%	12%	29%	40%	61%
Contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation	34%	34%	51%	36%	19%	27%	26%	37%	47%
Contacted CFIA for information [not requesting] on a permission, licence or certificate	33%	33%	49%	35%	19%	19%	23%	42%	46%
Searched for operational guidance using the Guidance Finder	27%	29%	18%	24%	34%	32%	34%	23%	14%
I have not looked for information from or had any personal contact with CFIA over the last 12 months	1%	-	1%	2%	-	2%	-	1%	-
Initiated a product recall either voluntary or ordered	15%	8%	8%	24%	16%	11%	12%	15%	23%
Don't know/ Refused	2%	2%	1%	2%	4%		3%	1%	6%

C1a: I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - CONTACT WITH CFIA									
	Total (n=370)	Industry Sector				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Looked for information about food safety regulations or requirements on the CFIA's website	56%	45%	74%	61%	35%	40%	48%	61%	91%
Have been inspected by CFIA within the past 12 months	47%	33%	59%	50%	40%	22%	46%	55%	70%
Contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation	33%	26%	53%	28%	19%	18%	26%	38%	71%
Contacted CFIA for information [not requesting] on a permission, licence or certificate	26%	21%	39%	28%	12%	8%	24%	32%	47%
Requested a permission, licence, registration, or certificate from CFIA	24%	23%	36%	19%	14%	9%	18%	29%	54%
Initiated a product recall either voluntary or ordered	21%	13%	12%	33%	25%	14%	26%	22%	19%
I have not looked for information from or had any personal contact with CFIA over the last 12 months	24%	40%	16%	18%	31%	48%	21%	19%	7%
Don't know/ Refused	3%	2%	-	2%	7%	4%	4%	2%	-

C1a: I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. Base: Businesses not exclusively in retail, Wave1, n=370.

From a regional perspective, contact with CFIA is particularly high among businesses in Atlantic Canada. Businesses not exclusively in retail in Ontario and Western Canada are also more likely to have looked for information about food safety regulations or requirements on CFIA's website.

What is also noteworthy about the extent of contact among businesses in Atlantic Canada is that the incidence of all forms of contact, except recalls and the use of the Guidance Finder, was noticeably higher among these businesses, especially the incidence of inspections, which was noted by 73% of these businesses.

All these results align with what was observed in Wave 1.

WAVE 2 - CONTACT WITH CFIA					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Looked for information about food safety regulations or requirements on the CFIA's website	57%	70%	43%	61%	58%
Have been inspected by CFIA within the past 12 months	42%	73%	36%	43%	38%
Requested a permission, licence, registration, or certificate from CFIA	34%	45%	25%	38%	33%
Contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation	34%	57%	33%	33%	30%
Contacted CFIA for information [not requesting] on a permission, licence or certificate	33%	56%	29%	35%	27%
Searched for operational guidance using the Guidance Finder	27%	11%	39%	23%	26%
I have not looked for information from or had any personal contact with CFIA over the last 12 months	1%	-	-	1%	1%
Initiated a product recall either voluntary or ordered	15%	19%	10%	17%	14%
Don't know/ Refused	2%	7%	2%	-	4%

C1a: I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - CONTACT WITH CFIA					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Looked for information about food safety regulations or requirements on the CFIA's website	56%	68%	43%	64%	51%
Have been inspected by CFIA within the past 12 months	47%	87%	39%	48%	43%
Contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation	33%	59%	24%	33%	34%
Contacted CFIA for information [not requesting] on a permission, licence or certificate	26%	43%	17%	27%	27%
Requested a permission, licence, registration, or certificate from CFIA	24%	63%	22%	21%	22%
Initiated a product recall either voluntary or ordered	21%	19%	14%	24%	21%
I have not looked for information from or had any personal contact with CFIA over the last 12 months	24%	2%	38%	20%	27%
Don't know/ Refused	3%	-	3%	2%	3%

C1a: I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. Base: Businesses not exclusively in retail, Wave 1, n=370.

Additional analysis does in fact reveal that businesses that were inspected over the past 12 months were significantly more likely to have undertaken the other activities, as seen in the tables below. This seems to suggest that the likelihood of contacting CFIA is in large part determined by whether or not a company gets inspected.

WAVE 2 - CONTACT WITH CFIA		
	Was Inspected by CFIA Within the Past 12 Months	
	Yes (n=219)	No (n=281)
Looked for information about food safety regulations or requirements on the CFIA's website	74%	45%
Have been inspected by CFIA within the past 12 months	100%	-
Requested a permission, licence, registration, or certificate from CFIA	56%	19%
Contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation	54%	19%
Contacted CFIA for information [not requesting] on a permission, licence or certificate	55%	17%
Searched for operational guidance using the Guidance Finder	4%	43%
I have not looked for information from or had any personal contact with CFIA over the last 12 months	-	1%
Initiated a product recall either voluntary or ordered	17%	13%
Don't know	-	4%

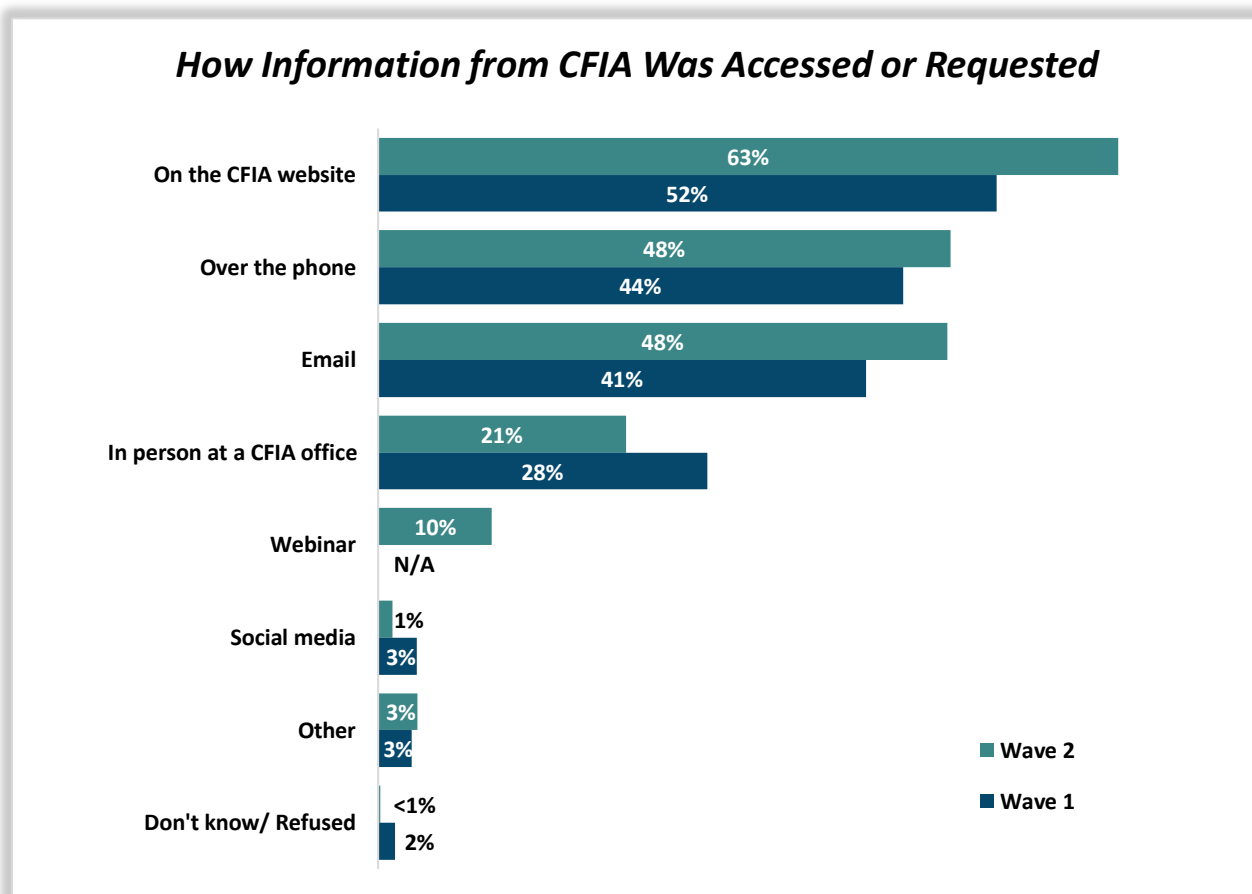
C1a: I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - CONTACT WITH CFIA		
	Was Inspected by CFIA Within the Past 12 Months	
	Yes (n=189)	No (n=181)
Looked for information about food safety regulations or requirements on the CFIA's website	74%	40%
Have been inspected by CFIA within the past 12 months	100%	-
Contacted CFIA directly for information or technical advice on food safety regulations or regulatory interpretation	53%	15%
Contacted CFIA for information [not requesting] on a permission, licence or certificate	44%	11%
Requested a permission, licence, registration, or certificate from CFIA	43%	7%
Initiated a product recall either voluntary or ordered	27%	15%
I have not looked for information from or had any personal contact with CFIA over the last 12 months	-	46%
Don't know/ Refused	-	5%

C1a: I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. Base: Businesses not exclusively in retail, Wave 1, n=370.

Businesses not exclusively in retail having contacted CFIA over the past 12 months most often did so through the CFIA website (63%), followed by contacting CFIA by phone (48%), or by email (48%). A smaller proportion contacted CFIA in person (21%) and only a few did so via social media (1%). These results suggest that businesses in general are using multiple channels to contact CFIA. The preference order of ways to contact CFIA remained similar from Wave 1 to Wave 2, although the proportion of those using the CFIA

website, phone, and email is higher in Wave 2, while contacting CFIA in person was slightly less common in Wave 2. The use of webinars was only asked in Wave 2.



C1: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it... Base: Businesses not exclusively in retail that had an interaction with CFIA, Wave 2, n=348, Wave 1, n=248.

Retailers are the most likely to contact CFIA via the website whereas processors and manufacturers are more likely to use the telephone, contact CFIA in person, or participate in a webinar. Small companies are also more likely to contact CFIA via the website, while medium companies would use email, contact in person or use a webinar, and large companies are most likely to contact CFIA over the phone and are relatively more likely to access a webinar.

WAVE 2 – HOW INFORMATION FROM CFIA WAS ACCESSED OR REQUESTED									
	Industry Sector					Company Size			
	Total (n=348)	Agriculture (n=64)	Processor/ Manufacturer (n=157)	Wholesaler/ Distributor (n=95)	Retailer (n=32)	Micro (n=53)	Small (n=61)	Medium (n=168)	Large (n=64)
On the CFIA website	63%	57%	57%	56%	79%	62%	77%	56%	64%
Over the phone	48%	45%	58%	49%	37%	39%	38%	48%	70%
Email	48%	48%	55%	47%	41%	30%	51%	53%	51%
In person	21%	20%	29%	14%	17%	11%	15%	28%	20%

WAVE 2 – HOW INFORMATION FROM CFIA WAS ACCESSED OR REQUESTED									
	Industry Sector					Company Size			
	Total (n=348)	Agriculture (n=64)	Processor/ Manufacturer (n=157)	Wholesaler/ Distributor (n=95)	Retailer (n=32)	Micro (n=53)	Small (n=61)	Medium (n=168)	Large (n=64)
Webinar	10%	8%	18%	8%	2%	3%	1%	13%	18%
Social media	1%	4%	1%	2%	-	-	2%	2%	-
Other	3%	4%	4%	5%	-	4%	1%	2%	9%
Don't know/ Refused	<1%	-	-	1%	-	-	-	<1%	-

C1: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it? ... Base: Businesses not exclusively in retail that had an interaction with CFIA, Wave 2, n=348.

WAVE 1 - HOW INFORMATION FROM CFIA WAS ACCESSED OR REQUESTED									
	Total (n=248)	Industry Sector				Company Size			
		Agriculture (n=26)	Processor/ Manufacturer (n=140)	Wholesaler/ Distributor (n=57)	Retailer (n=25)	Micro (n=25)	Small (n=54)	Medium (n=133)	Large (n=35)
On the CFIA website	52%	55%	41%	64%	58%	55%	54%	48%	59%
Over the phone	44%	61%	44%	45%	31%	39%	46%	43%	52%
Email	41%	33%	48%	40%	34%	23%	38%	46%	50%
In person	28%	43%	33%	14%	26%	21%	24%	28%	45%
Social media	3%	-	1%	4%	10%	7%	3%	3%	2%
Other	3%	3%	4%	2%	-	3%	3%	3%	-
Don't know/ Refused	1%	-	1%	4%	-	-	-	3%	-

C1: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it? Base: Businesses not exclusively in retail that had an interaction with CFIA, Wave 1, n=248.

Regionally, contact over the phone or email is more likely to happen in Atlantic Canada compared to other regions. Other results reveal that Quebec businesses report using the website more frequently businesses in other regions of the CFIA website and are also more likely to go to a CFIA office.

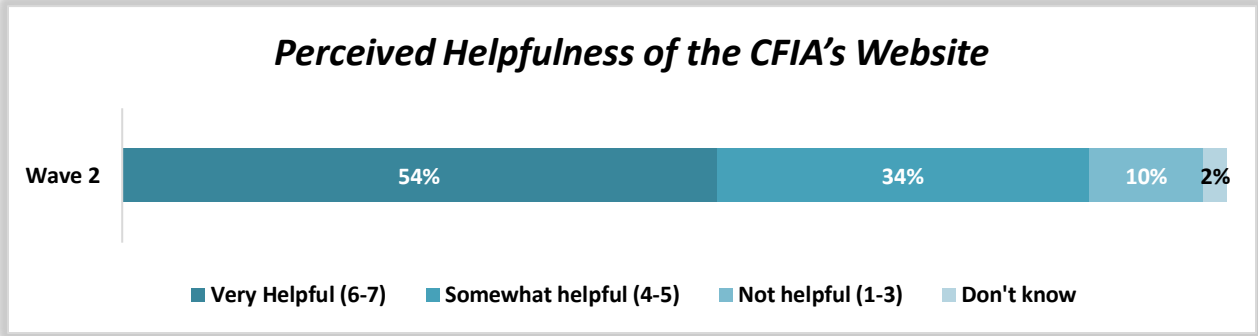
WAVE 2 - HOW INFORMATION FROM CFIA WAS ACCESSED OR REQUESTED					
	Total (n=348)	Region			
		Atlantic (n=37)	Quebec (n=84)	Ontario (n=99)	West (n=128)
On the CFIA website	63%	45%	68%	63%	62%
Over the phone	48%	68%	41%	47%	50%
Email	48%	71%	50%	43%	48%
In person at a CFIA office	21%	24%	31%	19%	17%
Webinar	10%	8%	13%	11%	7%
Social media	1%	-	-	2%	1%
Other	3%	-	8%	2%	3%
Don't know/ Refused	<1%	-	-	-	1%

C1: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it? ... Base: Businesses not exclusively in retail that had an interaction with CFIA, Wave 2, n=348.

WAVE 1 - HOW INFORMATION FROM CFIA WAS ACCESSED OR REQUESTED					
	Total (n=248)	Region			
		Atlantic (n=34)	Quebec (n=30)	Ontario (n=78)	West (n=106)
On the CFIA website	52%	46%	34%	62%	47%
Over the phone	44%	51%	37%	41%	50%
Email	41%	46%	46%	32%	51%
In person	28%	54%	19%	25%	28%
Social media	3%	9%	4%	3%	2%
Other	3%	4%	2%	3%	2%
Don't know/ Refused	1%	-	-	2%	1%

C1: You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it? Base: Businesses not exclusively in retail that reported an interaction with CFIA, Wave 1, n=248.

In Wave 2, businesses were asked to rate the helpfulness of the CFIA website. Half find the website very helpful, giving it a score of 6 or 7. An additional 34% rate the website somewhat helpful (rating of 4 or 5), and 10% found it was not helpful.



QC1B: To what extent was the information on the CFIA's website useful in helping you find the information you were looking for? Base: Businesses that have used the CFIA website, Wave 2, n=239.

Retailers, the largest reported users of the website, are the most likely to find it very helpful, while businesses in the agriculture, processor or manufacturer, wholesaler or distributor sectors find it somewhat helpful. Large businesses rate the website somewhat helpful as well. Micro businesses are more likely to find the website not useful. Regionally, businesses in Quebec and Ontario are more likely to find the website useful.

WAVE 2 - HELPFULNESS OF CFIA WEBSITE									
		Industry Sector				Company Size			
	Total (n=239)	Agriculture (n=40)	Processor/ Manufacturer (n=102)	Wholesaler/ Distributor (n=57)	Retailer (n=40)	Micro (n=38)	Small (n=31)	Medium (n=109)	Large (n=39)
CFIA website									
Very helpful (6-7)	54%	40%	52%	43%	63%	51%	51%	59%	49%
Somewhat helpful (4-5)	34%	53%	40%	43%	21%	19%	39%	32%	49%
Not very helpful (1-3)	10%	7%	7%	14%	12%	21%	10%	8%	2%
Don't know	2%	-	1%	-	4%	9%	-	1%	-

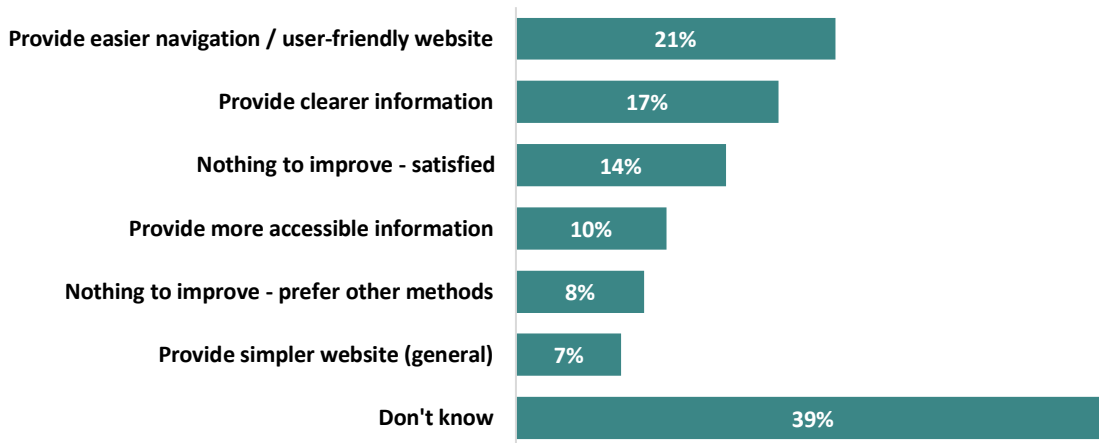
QC1B: To what extent was the information on the CFIA's website useful in helping you find the information you were looking for? Base: Businesses that have used the CFIA website, Wave 2: n=239.

WAVE 2 - HELPFULNESS OF CFIA WEBSITE					
		Region			
	Total (n=239)	Atlantic (n=17)	Quebec (n=71)	Ontario (n=69)	West (n=82)
CFIA website					
Very helpful (6-7)	54%	27%	60%	64%	38%
Somewhat helpful (4-5)	34%	54%	27%	30%	42%
Not very helpful (1-3)	10%	18%	9%	7%	16%
Don't know	2%	-	4%	-	4%

QC1B: To what extent was the information on the CFIA's website useful in helping you find the information you were looking for? Base: Businesses that have used the CFIA website, Wave 2: n=239.

Website users were asked to suggest what could be done to CFIA's inspection.gc.ca site to improve it. The main suggestions included making it easier to navigate and more user-friendly (21%) and providing clearer information (17%). Other suggestions, which also speak to navigation and being user-friendly, included providing more accessible information (10%) and simplifying the website (7%). Nearly two in five (39%) did not have any suggestions while 14% added that they are satisfied with the site as-is.

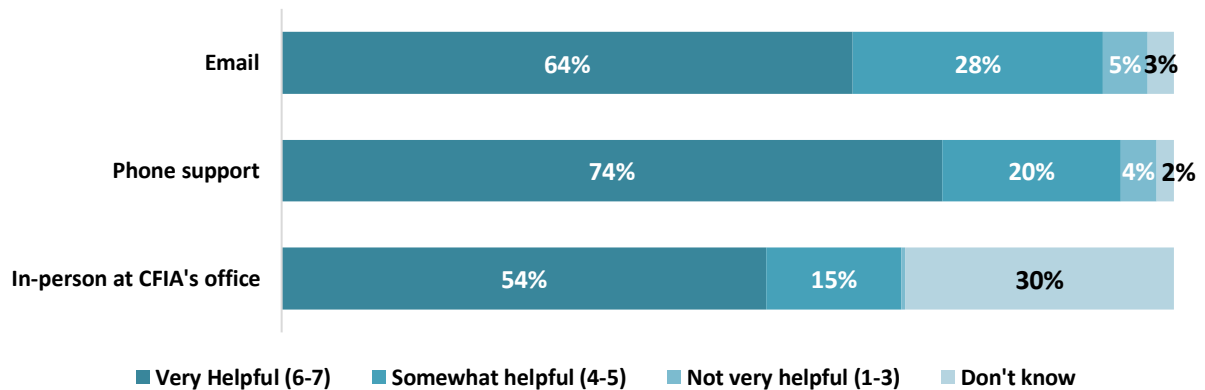
Suggestions to Improve CFIA's Website



C1c. How could the CFIA improve their website? Base: Businesses that have used the CFIA website, Wave 2: n=239.

Respondents were also asked to rate the helpfulness of the Agency's email, phone, and in-person service when contacting CFIA for information. Nearly three quarters (75%) of those who contacted CFIA by phone found the support very useful and an additional 20% found it somewhat useful. Nearly two thirds (64%) of those who used email to contact CFIA found it very useful, and 28% somewhat useful. Of those who contacted CFIA in person, 54% found the information very useful and 15% found it somewhat useful. However, 30% did not know how to rate the service received.

Perceived Helpfulness of Information Obtained via CFIA's Email, Phone and In Person Services



C1D. To what extent was the information provided by email useful in helping you find the information you were looking for? Base: Respondents who have contacted the CFIA by email, Wave 2: n=194. C1E. To what extent was the information provided by phone useful in helping you find the information you were looking for? Base: Respondents who have contacted the CFIA by phone, Wave 2: n=201. C1F. To what extent was the information obtained in person at a CFIA office useful in helping you find the information you were looking for? Base: Respondents who have contacted the CFIA in person, Wave 2: n=88.

Results by various business segments suggest that the perceived helpfulness of email information is similar across all business verticals and sizes. Results are presented in the tables below however caution is warranted since many results are based on small sample sizes.

WAVE 2 - HELPFULNESS OF INFORMATION OBTAINED BY EMAIL									
		Industry Sector				Company Size			
	Total (n=194)	Agriculture (n=35)	Processor/Manufacturer (n=89)	Wholesaler/Distributor (n=45)	Retailer (n=25)	Micro (n=20)	Small (n=37)	Medium (n=98)	Large (n=37)
CFIA Email									
Very helpful (6-7)	64%	75%	70%	70%	51%	74%	56%	66%	65%
Somewhat helpful (4-5)	28%	18%	24%	25%	39%	15%	32%	28%	35%
Not very helpful (1-3)	5%	7%	4%	5%	4%	4%	7%	5%	-
Don't know	3%	-	2%	-	6%	8%	5%	1%	-

C1D. To what extent was the information provided by email useful in helping you find the information you were looking for? Base: Respondents who have contacted the CFIA by email, Wave 2: n=194.

WAVE 2 - HELPFULNESS OF INFORMATION OBTAINED BY EMAIL					
		Region			
	Total (n=194)	Atlantic (n=25)	Quebec (n=49)	Ontario (n=47)	West (n=73)
CFIA Email					
Very helpful (6-7)	64%	87%	53%	71%	58%
Somewhat helpful (4-5)	28%	2%	34%	24%	37%
Not very helpful (1-3)	5%	10%	1%	5%	5%
Don't know	3%	-	11%	-	1%

C1D. To what extent was the information provided by email useful in helping you find the information you were looking for? Base: Respondents who have contacted the CFIA by email, Wave 2: n=194.

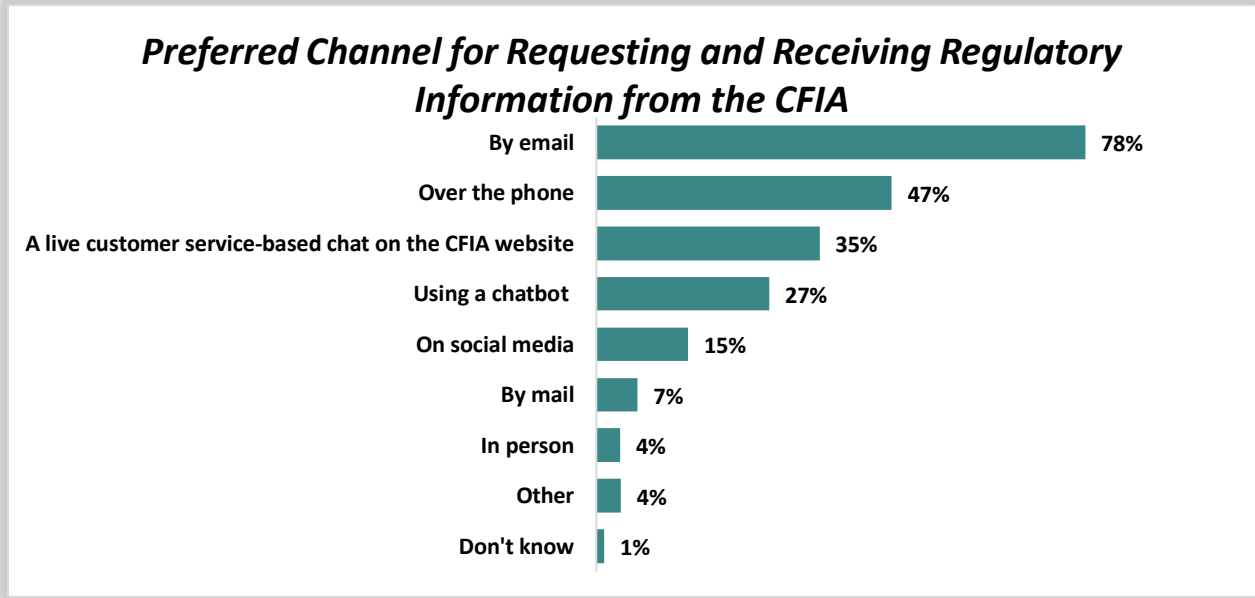
WAVE 2 - HELPFULNESS OF INFORMATION OBTAINED BY PHONE									
		Industry Sector				Company Size			
	Total (n=201)	Agriculture (n=30)	Processor/Manufacturer (n=95)	Wholesaler/Distributor (n=46)	Retailer (n=30)	Micro (n=30)	Small (n=33)	Medium (n=94)	Large (n=43)
CFIA Phone Support									
Very helpful (6-7)	74%	63%	81%	68%	73%	93%	62%	72%	67%
Somewhat helpful (4-5)	20%	21%	12%	24%	24%	1%	34%	23%	23%
Not very helpful (1-3)	4%	10%	7%	7%	-	1%	5%	4%	8%
Don't know	2%	5%	-	2%	3%	4%	-	1%	3%

C1E. To what extent was the information provided by phone useful in helping you find the information you were looking for? Base: Respondents who have contacted the CFIA by phone, Wave 2: n=201.

WAVE 2 - HELPFULNESS OF INFORMATION OBTAINED BY PHONE					
	Region				
	Total (n=201)	Atlantic (n=28)	Quebec (n=48)	Ontario (n=54)	West (n=71)
CFIA Phone Support					
Very helpful (6-7)	74%	90%	83%	68%	71%
Somewhat helpful (4-5)	20%	4%	11%	23%	26%
Not very helpful (1-3)	4%	6%	2%	7%	2%
Don't know	2%	-	5%	1%	1%

C1E. To what extent was the information provided by phone useful in helping you find the information you were looking for? Base: Respondents who have contacted the CFIA by phone, Wave 2: n=201.

Businesses were asked to indicate how they would prefer to request and receive regulatory information from CFIA. The preferred method by far is email, as indicated by 78% of respondents, followed by phone at 47% and a live customer service-based chat on the CFIA website (35%). Just over a quarter (27%) prefer using a chatbot (27%) and 15% mentioned social media (15%). Very few prefer mail (7%) and in person (4%).



QC1G: How would you prefer to request and receive regulatory information from the CFIA? Base: All Respondents Wave 2, n=700.

Businesses in the processor or manufacturer sector are more likely to say they prefer to request and receive regulatory information from CFIA through a live customer service-based chat on the CFIA website, or in person, compared to businesses in other sectors (although by email is the most popular channel for this segment, just as it is for every other segment). Compared to a few other sectors, retailers are more likely to prefer receiving this information by mail. In terms of company size, medium and large businesses are more likely to prefer receiving this information by email, while micro companies are more likely to prefer regular mail.

WAVE 2 - PREFERRED CHANNEL TO REQUEST AND RECEIVE REGULATORY INFORMATION FROM CFIA									
	Industry Sector					Company Size			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
By Email	78%	84%	83%	78%	75%	66%	75%	85%	93%
Over the phone	47%	51%	49%	52%	44%	46%	46%	48%	52%
Live customer service-based chat on the CFIA website	35%	38%	48%	35%	32%	33%	30%	38%	46%
Using a chatbot	27%	27%	30%	22%	28%	26%	29%	26%	35%
Social media	15%	11%	10%	11%	17%	18%	14%	15%	7%
By mail	7%	7%	6%	3%	8%	13%	5%	4%	3%
In person	4%	3%	7%	1%	3%	2%	6%	3%	5%
Other	4%	3%	2%	2%	5%	5%	4%	4%	3%
Don't know	1%			2%	2%	1%	1%	2%	

QC1G: How would you prefer to request and receive regulatory information from the CFIA? Base: All Respondents Wave 2, n=700.

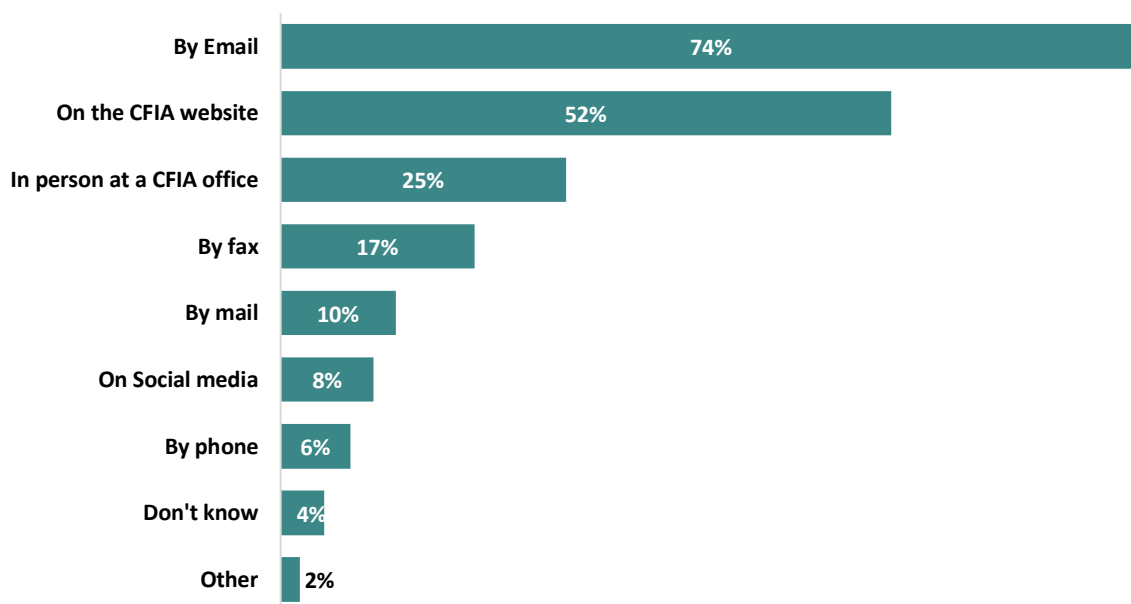
From a regional perspective, businesses in Atlantic Canada are the most likely to prefer receiving regulatory information over the phone, while those in Quebec lean towards using a chatbot or social media. Social media is also relatively more popular in Ontario compared to a few other regions.

WAVE 2 - PREFERRED CHANNEL TO REQUEST AND RECEIVE REGULATORY INFORMATION FROM CFIA					
	Region				
	Total (n=700)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
By Email	78%	84%	76%	79%	76%
Over the phone	47%	62%	50%	42%	46%
Live customer service-based chat on the CFIA website	35%	31%	38%	37%	33%
Using a chatbot	27%	15%	36%	27%	25%
Social media	15%	5%	19%	17%	12%
By mail	7%	4%	5%	7%	8%
In person	4%	1%	3%	5%	3%
Other	4%	2%	5%	4%	4%
Don't know	1%	3%	1%	<1%	2%

QC1G: How would you prefer to request and receive regulatory information from the CFIA? Base: All Respondents Wave 2, n=700.

When asked how they would prefer to receive CFIA services, 74% of businesses prefer to receive them by email, 52% on the CFIA website, 25% prefer to go to a CFIA office and receive them in person, and less than one fifth prefer to receive them by fax (17%), mail (10%), on social media (8%), or by phone (6%).

Preferred Channel to Request and Receive CFIA Services



QC1H: How would you prefer to request and receive CFIA services, such as food licenses or export certificates? Base: All Respondents Wave 2, n=700.

Businesses in the processor/manufacture sector are the most likely to prefer receiving CFIA services by email, on the CFIA website, or in person at a CFIA office, while retailers are the most likely to prefer receiving services by mail. In terms of company size, large companies are more likely to prefer email and the CFIA website. Medium size businesses are also more likely to prefer email, while regular mail is more likely to be popular among micro businesses compared to larger businesses.

WAVE 2 - PREFERRED CHANNEL TO REQUEST AND RECEIVE CFIA SERVICES									
	Industry Sector					Company Size			
	Total (n=700)	Agriculture (n=115)	Processor/Manufacturer (n=227)	Wholesaler/Distributor (n=146)	Retailer (n=212)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
By Email	74%	79%	80%	79%	71%	63%	74%	79%	89%
On the CFIA website	52%	47%	62%	55%	50%	46%	48%	56%	71%
In person at a CFIA office	25%	24%	32%	21%	23%	24%	22%	25%	30%
By fax	17%	22%	16%	20%	15%	16%	18%	17%	13%
By mail	10%	3%	6%	4%	13%	19%	8%	7%	-
On Social media	8%	9%	7%	6%	9%	8%	10%	7%	6%
By phone	6%	6%	4%	4%	7%	8%	5%	7%	2%
Other	2%	-	2%	2%	2%	-	3%	2%	-
Don't know	4%	3%	<1%	4%	5%	5%	5%	3%	3%

QC1H: How would you prefer to request and receive CFIA services, such as food licenses or export certificates? Base: All Respondents Wave 2, n=700.

Businesses in Western Canada are the most likely to prefer receiving CFIA services by regular mail, while those in Ontario and Quebec are the most likely to prefer social media.

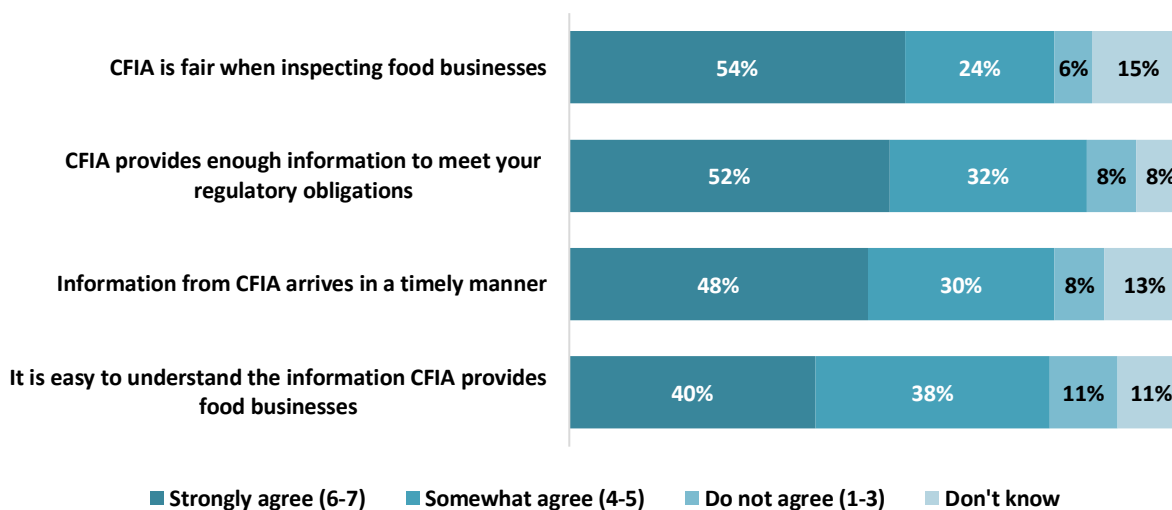
WAVE 2 - PREFERRED CHANNEL TO REQUEST AND RECEIVE CFIA SERVICES					
	Region				
	Total (n=700)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
By Email	74%	77%	72%	78%	71%
On the CFIA website	52%	39%	50%	55%	54%
In person at a CFIA office	25%	25%	27%	24%	23%
By fax	17%	24%	13%	17%	17%
By mail	10%	10%	6%	9%	13%
On Social media	8%	1%	11%	10%	6%
By phone	6%	11%	4%	7%	5%
Other	2%	-	2%	3%	<1%
Don't know	4%	7%	5%	1%	5%

QC1H: How would you prefer to request and receive CFIA services, such as food licenses or export certificates? Base: All Respondents Wave 2, n=700.

General Impressions of CFIA

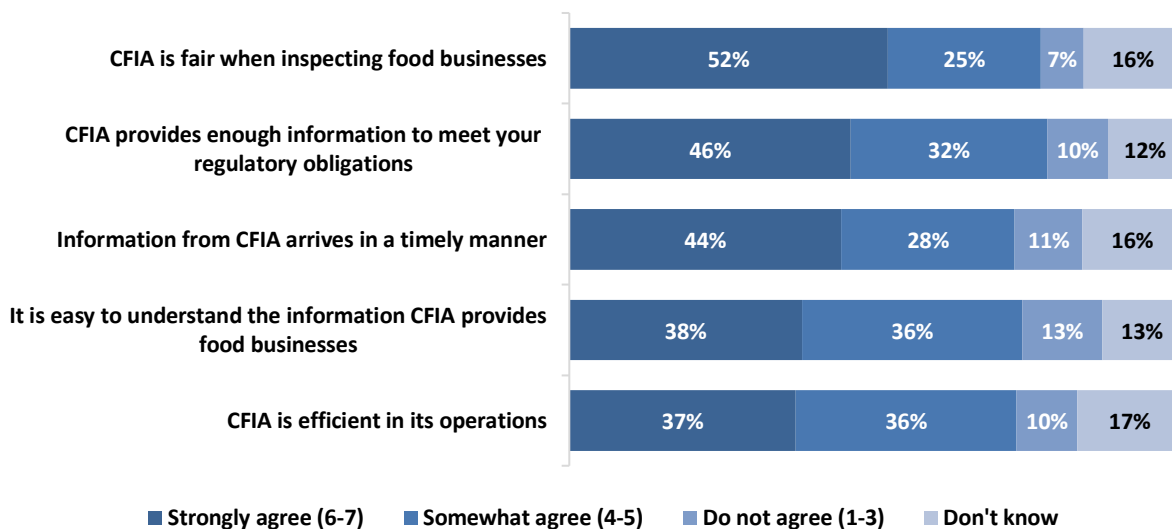
Roughly half of businesses strongly agree that CFIA is fair when inspecting food businesses (54%), that it provides enough information to meet regulatory obligations (52%), and that the information from CFIA arrives in a timely manner (48%). Agreement drops slightly to 40% when asked if it is easy to understand the information CFIA provides to food businesses. Between 8% and 15% of businesses did not know enough about CFIA to be able to rate them across these specific dimensions and about one in ten seem to disagree with each evaluation criteria. Results from Wave 1 are similar to those obtained in Wave 2, although there is an extra dimension tested in Wave 1.

General Impressions CFIA



C2: On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: Businesses not exclusively in retail, Wave 2 n=500.

General Impressions of CFIA



C2: On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? (Efficiency in operations was asked only in Wave 1). Base: Businesses not exclusively in retail, Wave 1 n=370.

Respondents who have been inspected by CFIA and those who have been in contact with CFIA over the past 12 months are more likely to agree with all statements compared to those who have not been inspected by or have not been in contact with CFIA. This is observed in both research waves.

WAVE 2 - GENERAL IMPRESSIONS OF CFIA					
		Was Inspected by the CFIA Within the Past 12 Months		Had Contact with CFIA Within the Past 12 Months	
	Total (n=500)	Yes (n=219)	No (n=281)	Yes (n=348)	No (n=152)
CFIA is fair when inspecting food businesses					
Strongly agree (6-7)	54%	73%	41%	62%	40%
Somewhat agree (4-5)	24%	20%	27%	22%	29%
Do not agree (1-3)	6%	6%	6%	5%	8%
Don't know	15%	1%	25%	11%	23%
It is easy to understand the information CFIA provides food businesses					
Strongly agree (6-7)	40%	50%	32%	45%	29%
Somewhat agree (4-5)	38%	36%	40%	43%	30%
Do not agree (1-3)	11%	12%	11%	10%	14%
Don't know	11%	2%	17%	2%	26%
CFIA provides enough information to meet your regulatory obligations					
Strongly agree (6-7)	52%	61%	45%	61%	59%
Somewhat agree (4-5)	32%	32%	33%	31%	20%
Do not agree (1-3)	8%	7%	8%	6%	21%
Don't know	8%	-	14%	2%	-
Information from CFIA arrives in a timely manner					
Strongly agree (6-7)	48%	54%	43%	57%	30%
Somewhat agree (4-5)	30%	34%	28%	31%	29%
Do not agree (1-3)	8%	8%	9%	7%	11%
Don't know	13%	4%	20%	5%	29%

C2: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - GENERAL IMPRESSIONS OF CFIA					
		Was Inspected by CFIA Within the Past 12 Months		Had Contact with CFIA Within the Past 12 Months	
	Total (n=370)	Yes (n=189)	No (n=181)	Yes (n=281)	No (n=82)
CFIA is fair when inspecting food businesses					
Strongly agree (6-7)	52%	72%	34%	63%	20%
Somewhat agree (4-5)	25%	23%	27%	27%	22%
Do not agree (1-3)	7%	4%	9%	4%	14%
Don't know	16%	1%	30%	6%	43%
CFIA is efficient in its operations					
Strongly agree (6-7)	37%	53%	23%	46%	14%
Somewhat agree (4-5)	36%	35%	37%	37%	33%
Do not agree (1-3)	10%	7%	11%	7%	17%
Don't know	17%	5%	28%	10%	37%
It is easy to understand the information CFIA provides food businesses					
Strongly agree (6-7)	38%	49%	28%	46%	15%

WAVE 1 - GENERAL IMPRESSIONS OF CFIA					
	Total (n=370)	Was Inspected by CFIA Within the Past 12 Months		Had Contact with CFIA Within the Past 12 Months	
		Yes (n=189)	No (n=181)	Yes (n=281)	No (n=82)
Somewhat agree (4-5)	36%	38%	35%	38%	32%
Do not agree (1-3)	13%	12%	14%	13%	13%
Don't know	13%	1%	23%	3%	40%
CFIA provides enough information to meet your regulatory obligations					
Strongly agree (6-7)	46%	61%	32%	55%	22%
Somewhat agree (4-5)	32%	33%	32%	35%	24%
Do not agree (1-3)	10%	5%	14%	6%	19%
Don't know	12%	1%	22%	3%	36%
Information from CFIA arrives in a timely manner					
Strongly agree (6-7)	44%	60%	30%	55%	16%
Somewhat agree (4-5)	28%	27%	30%	30%	23%
Do not agree (1-3)	11%	9%	14%	9%	18%
Don't know	16%	5%	27%	6%	43%

C2: On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: Businesses not exclusively in retail, Wave 1, n=370.

Impressions of CFIA across the four major industry verticals are fairly consistent; although, results show that a relatively higher proportion of processors and manufacturers agree that CFIA is fair when inspecting food businesses, or that the information provided by CFIA arrives in a timely manner. Businesses in the wholesaler or distributor sector are the most likely to disagree with the latter statement. When considering the size of businesses, large companies are the most likely to agree CFIA is fair when inspecting food businesses and that the information from CFIA arrives in a timely manner. Medium, small and micro companies are less likely to be familiar with some aspects of CFIA, which is seen through the higher incidence of “don’t know” ratings among these segments. In Wave 1, results for businesses in the retail sector show a lower familiarity with CFIA than in Wave 2.

WAVE 2 - GENERAL IMPRESSIONS OF CFIA									
	Total (n=500)	Industry Vertical				Company Size			
		Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
CFIA is fair when inspecting food businesses									
Strongly agree (6-7)	54%	57%	65%	56%	44%	51%	45%	56%	72%
Somewhat agree (4-5)	24%	20%	17%	26%	30%	21%	33%	24%	16%
Do not agree (1-3)	6%	5%	6%	5%	7%	7%	6%	7%	3%
Don't know	15%	18%	12%	13%	19%	21%	16%	13%	9%
It is easy to understand the information CFIA provides food businesses									
Strongly agree (6-7)	40%	35%	37%	43%	41%	38%	38%	36%	57%
Somewhat agree (4-5)	38%	36%	46%	37%	35%	41%	29%	43%	36%
Do not agree (1-3)	11%	16%	10%	12%	11%	7%	14%	14%	7%
Don't know	11%	13%	8%	8%	13%	14%	20%	7%	1%

CFIA provides enough information to meet your regulatory obligations									
Strongly agree (6-7)	52%	55%	51%	54%	50%	50%	49%	50%	61%
Somewhat agree (4-5)	32%	27%	34%	32%	33%	33%	29%	34%	33%
Do not agree (1-3)	8%	8%	9%	6%	9%	9%	9%	9%	2%
Don't know	8%	10%	7%	8%	9%	8%	13%	6%	4%
Information from CFIA arrives in a timely manner									
Strongly agree (6-7)	48%	54%	48%	49%	45%	43%	41%	52%	54%
Somewhat agree (4-5)	30%	23%	37%	24%	32%	22%	33%	31%	38%
Do not agree (1-3)	8%	8%	5%	13%	7%	8%	11%	9%	3%
Don't know	13%	15%	9%	13%	16%	26%	15%	8%	6%

C2: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: Businesses not exclusively in retail, Wave 2 n=500.

WAVE 1 - GENERAL IMPRESSIONS OF CFIA									
	Total (n=370)	Industry Vertical				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
CFIA is fair when inspecting food businesses									
Strongly agree (6-7)	52%	48%	59%	59%	39%	41%	44%	57%	78%
Somewhat agree (4-5)	25%	25%	21%	24%	30%	27%	26%	25%	22%
Do not agree (1-3)	7%	10%	8%	7%	3%	9%	8%	6%	-
Don't know	16%	17%	12%	10%	28%	23%	22%	13%	-
CFIA is efficient in its operations									
Strongly agree (6-7)	37%	33%	38%	41%	35%	29%	33%	41%	49%
Somewhat agree (4-5)	36%	44%	37%	36%	30%	37%	33%	36%	46%
Do not agree (1-3)	10%	14%	11%	6%	8%	10%	10%	10%	5%
Don't know	17%	9%	14%	16%	27%	23%	24%	13%	-
It is easy to understand the information CFIA provides food businesses									
Strongly agree (6-7)	38%	35%	34%	44%	38%	34%	30%	42%	49%
Somewhat agree (4-5)	36%	45%	40%	37%	25%	35%	38%	35%	43%
Do not agree (1-3)	13%	7%	19%	9%	13%	15%	14%	13%	9%
Don't know	13%	13%	6%	10%	23%	16%	19%	10%	-
CFIA provides enough information to meet your regulatory obligations									
Strongly agree (6-7)	46%	43%	48%	50%	42%	39%	39%	52%	54%
Somewhat agree (4-5)	32%	32%	38%	30%	27%	31%	33%	30%	44%
Do not agree (1-3)	10%	15%	9%	10%	7%	15%	9%	9%	3%
Don't know	12%	10%	5%	10%	23%	14%	18%	9%	-
Information from CFIA arrives in a timely manner									
Strongly agree (6-7)	44%	38%	45%	44%	46%	31%	42%	49%	52%
Somewhat agree (4-5)	28%	34%	31%	27%	23%	31%	22%	30%	35%
Do not agree (1-3)	11%	15%	13%	14%	5%	14%	11%	11%	10%
Don't know	16%	13%	11%	15%	26%	24%	24%	10%	3%

C2: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: Businesses not exclusively in retail, n=370.

Regionally, impressions are generally more positive among businesses in Atlantic Canada, except for how easy it is to understand the information CFIA provides to food businesses. This trend is similar in Wave 1, when Atlantic Canada businesses also had the most positive impressions.

WAVE 2 - GENERAL IMPRESSIONS OF CFIA					
	Region				
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
CFIA is fair when inspecting food businesses					
Strongly agree (6-7)	54%	79%	51%	55%	50%
Somewhat agree (4-5)	24%	12%	24%	26%	25%
Do not agree (1-3)	6%	-	8%	5%	8%
Don't know	15%	9%	18%	14%	17%
It is easy to understand the information CFIA provides food businesses					
Strongly agree (6-7)	40%	29%	36%	45%	37%
Somewhat agree (4-5)	38%	43%	34%	37%	42%
Do not agree (1-3)	11%	15%	13%	11%	11%
Don't know	11%	13%	17%	8%	10%
CFIA provides enough information to meet your regulatory obligations					
Strongly agree (6-7)	52%	71%	44%	54%	50%
Somewhat agree (4-5)	32%	17%	34%	34%	33%
Do not agree (1-3)	8%	4%	10%	6%	10%
Don't know	8%	8%	13%	7%	7%
Information from CFIA arrives in a timely manner					
Strongly agree (6-7)	48%	55%	44%	50%	45%
Somewhat agree (4-5)	30%	21%	32%	31%	31%
Do not agree (1-3)	8%	8%	10%	8%	7%
Don't know	13%	15%	14%	11%	17%

C2: On a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree", based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: Businesses not exclusively in retail, Wave 2, n=500.

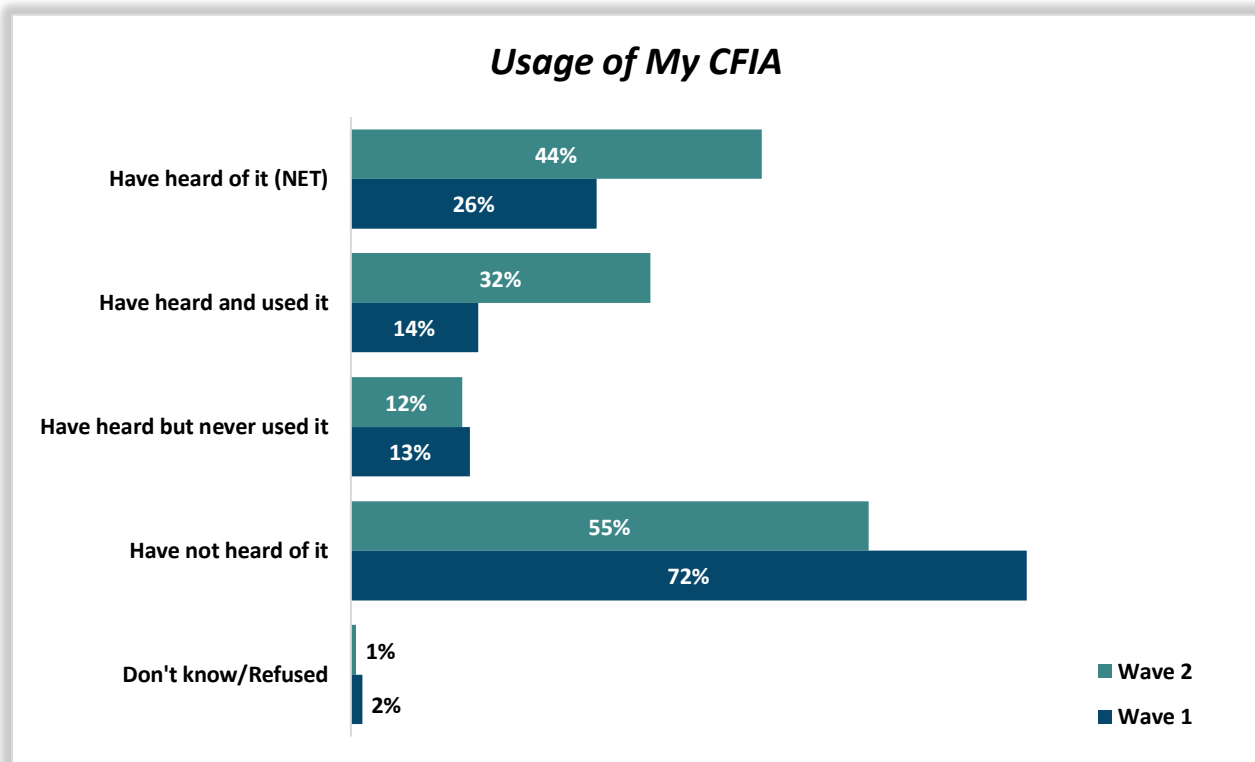
WAVE 1 - GENERAL IMPRESSIONS OF CFIA					
	Region				
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
CFIA is fair when inspecting food businesses					
Strongly agree (6-7)	52%	72%	30%	61%	49%
Somewhat agree (4-5)	25%	22%	37%	20%	26%
Do not agree (1-3)	7%	1%	12%	5%	7%
Don't know	16%	4%	21%	14%	19%
CFIA is efficient in its operations					
Strongly agree (6-7)	37%	58%	33%	36%	37%
Somewhat agree (4-5)	36%	31%	39%	38%	33%
Do not agree (1-3)	10%	2%	13%	7%	13%
Don't know	17%	9%	15%	19%	18%
It is easy to understand the information CFIA provides food businesses					
Strongly agree (6-7)	38%	47%	27%	41%	37%
Somewhat agree (4-5)	36%	40%	37%	38%	33%
Do not agree (1-3)	13%	11%	20%	8%	16%
Don't know	13%	2%	15%	12%	14%

CFIA provides enough information to meet your regulatory obligations					
Strongly agree (6-7)	46%	77%	36%	45%	47%
Somewhat agree (4-5)	32%	15%	35%	37%	28%
Do not agree (1-3)	10%	7%	15%	6%	12%
Don't know	12%	2%	14%	11%	13%
Information from CFIA arrives in a timely manner					
Strongly agree (6-7)	44%	57%	33%	44%	46%
Somewhat agree (4-5)	28%	25%	35%	30%	24%
Do not agree (1-3)	11%	11%	11%	9%	14%
Don't know	16%	7%	21%	17%	15%

C2: On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? Base: Businesses not exclusively in retail, n=370.

My CFIA

The survey also examined awareness and likelihood to use the new digital service developed for convenient service delivery My CFIA. Based on the most recent wave of surveys, nearly half of businesses not exclusively in retail (44%) are aware of the My CFIA portal, with 32% having used it. Those in the retailer sector as well as micro or small companies are the least likely to have heard about the portal. Regionally, awareness is the lowest in Quebec (32%) while awareness in the other three regions ranges between 42% in Western Canada and 60% in Atlantic Canada. Both awareness and usage are significantly higher in Wave 2 than in Wave 1. Awareness increased from 26% to 44%, and usage more than doubled from 14% to 32%.



F1: Have you ever heard, seen or read anything about CFIA’s online portal called “My CFIA?” Base: Businesses not exclusively in retail, Wave 2, n=500, Wave 1, n=370.

WAVE 2 - USAGE OF MY CFIA									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Yes (NET)	44%	43%	68%	54%	20%	28%	34%	52%	62%
Yes, I used it	32%	33%	50%	40%	13%	15%	26%	38%	51%
Yes, but I never used it	12%	9%	17%	14%	7%	13%	9%	14%	11%
No	55%	56%	32%	45%	80%	70%	66%	47%	38%
Don't know/Not sure	1%	2%	<1%	1%	-	2%	-	1%	-

F1: Have you ever heard, seen or read anything about CFIA's online portal called "My CFIA?" Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 2 - USAGE OF MY CFIA					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Yes (NET)	44%	60%	32%	49%	42%
Yes, I used it	32%	40%	20%	37%	31%
Yes, but I never used it	12%	20%	12%	12%	11%
No	55%	40%	68%	50%	58%
Don't know/Not sure	1%	-	<1%	1%	-

F1: Have you ever heard, seen or read anything about CFIA's online portal called "My CFIA?" Base: Businesses not exclusively in retail, Wave 2, n=500.

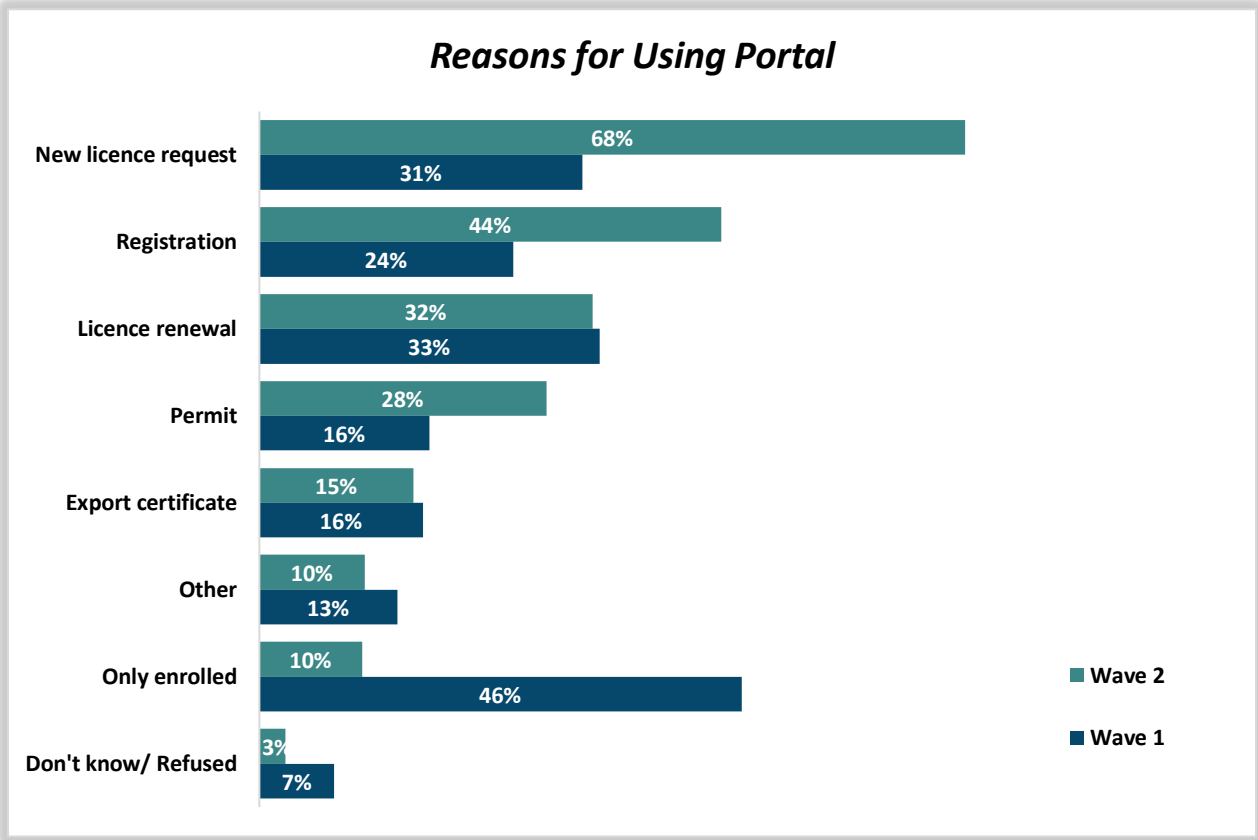
WAVE 1 - USAGE OF MY CFIA									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Yes (NET)	26%	21%	49%	24%	4%	12%	19%	32%	56%
Yes, I used it	14%	10%	26%	14%	-	4%	7%	19%	32%
Yes, but I never used it	13%	10%	23%	10%	4%	8%	12%	13%	24%
No	72%	78%	51%	72%	96%	87%	80%	66%	44%
Don't know/Not sure	1%	1%	-	4%	-	1%	1%	1%	-

F1: Have you ever heard, seen or read anything about CFIA's online portal called "My CFIA?" Base: Businesses not exclusively in retail, Wave 1, n=370.

WAVE 1 - USAGE OF MY CFIA					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Yes	26%	39%	15%	26%	30%
Yes, I used it	14%	19%	8%	13%	16%
Yes, but I never used it	13%	20%	7%	13%	14%
No	72%	61%	85%	72%	69%
Don't know/Not sure	1%	-	-	2%	1%

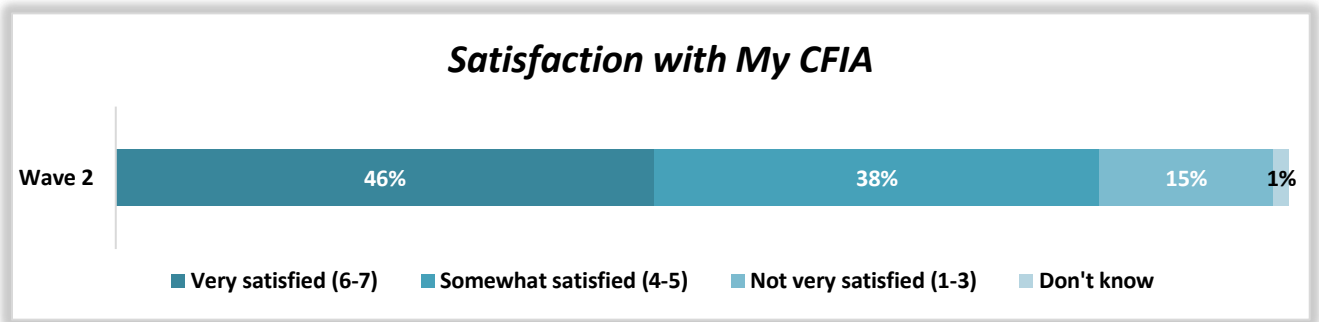
F1: Have you ever heard, seen or read anything about CFIA's online portal called "My CFIA?" Base: Businesses not exclusively in retail, Wave 1, n=370.

Among the 32% of businesses that have used My CFIA, 68% did so to request a new licence, 44% to register their business, 32% to renew their licence, 28% to obtain a permit, 15% to obtain an export certificate, and 10% only to enroll without using any other portal features. The frequency of activities in the portal is similar to results from Wave 1, however, usage in Wave 1 was lower and relatively new to many businesses, since 46% had only enrolled at that time. It should also be noted that results from Wave 1 are only based on 65 respondents. As well, subgroup results have very small sample sizes and potential statistical differences are not highlighted for this question so as to avoid implying or indicating significance that does not exist.

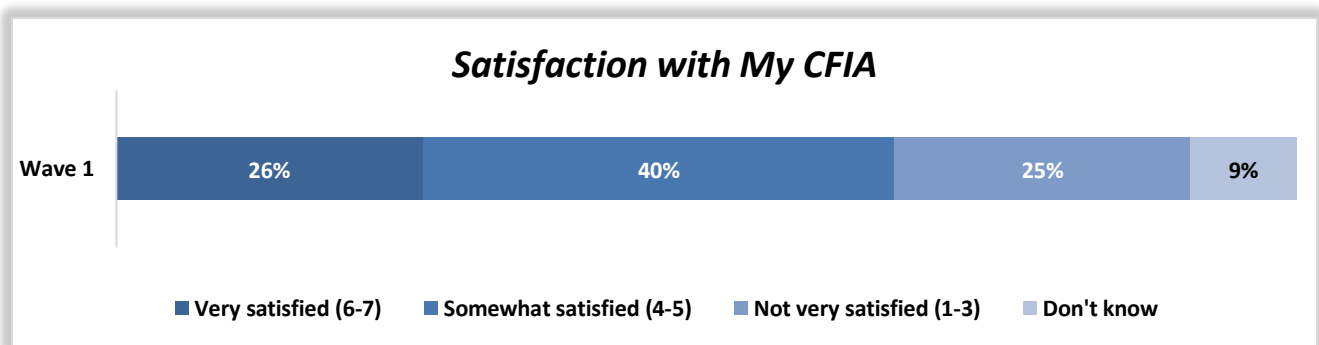


F1A: Have you ever used the portal for a... Base: Businesses not exclusively in retail that have used "My CFIA", Wave 2, n=183, Wave 1, n=65.

Overall, satisfaction with the portal is positive, as nearly half of users (46%) gave a satisfaction rating of 6 or 7 (on a 7-point scale), and 38% a rating of 4 or 5. Satisfaction in Wave 1 was much lower, likely due to the higher number of respondents who had only enrolled and had not had the opportunity to experience the services that are now available.



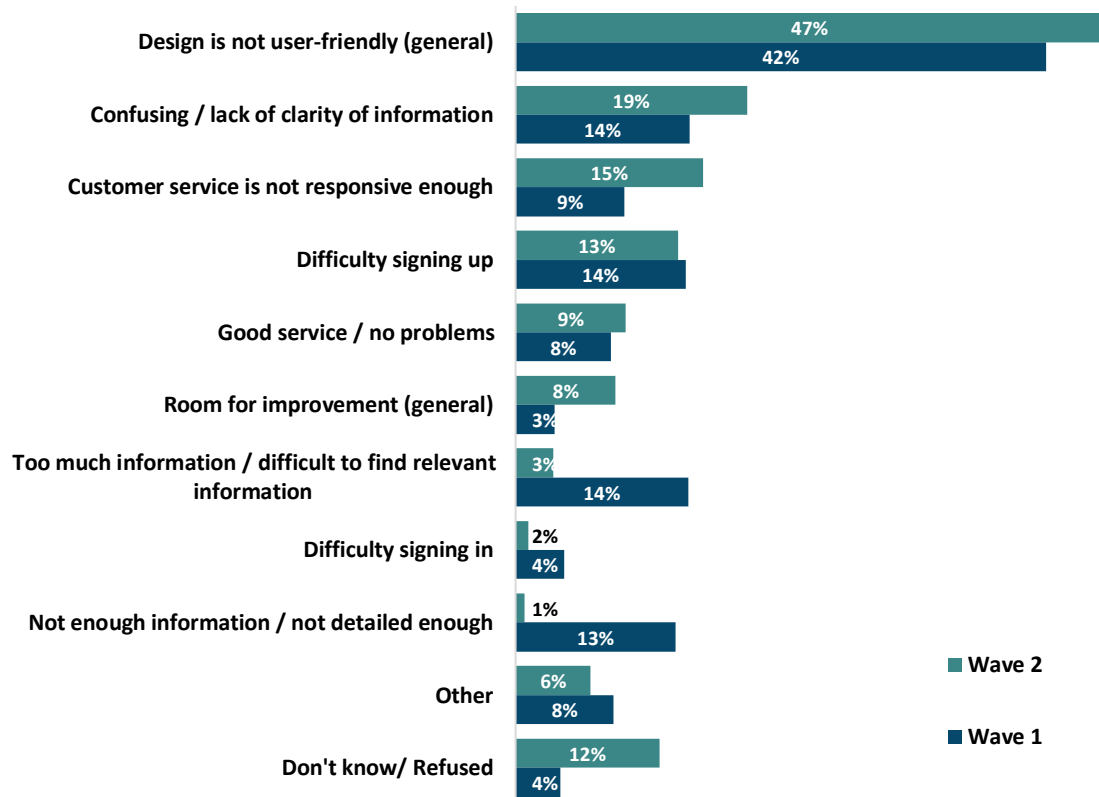
F2: Please rate your overall level of satisfaction with "My CFIA" on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied. Base: Businesses not exclusively in retail that have used "My CFIA", Wave 2, n=183.



F2: Please rate your overall level of satisfaction with "My CFIA" on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied. Base: Businesses not exclusively in retail that have used "My CFIA", Wave 1, n=65.

According to participants who provided a lower satisfaction score for My CFIA (102 businesses in total gave a satisfaction rating from 1 to 5 in Wave 2 and 40 in Wave 1), the most common reason was that the design was not user-friendly. Other attributes are summarized in the graph below. It should be noted that these results are based on a small number of respondents and should be considered directional.

Reasons for "My CFIA" Low Satisfaction Rating (a rating of 1-5)

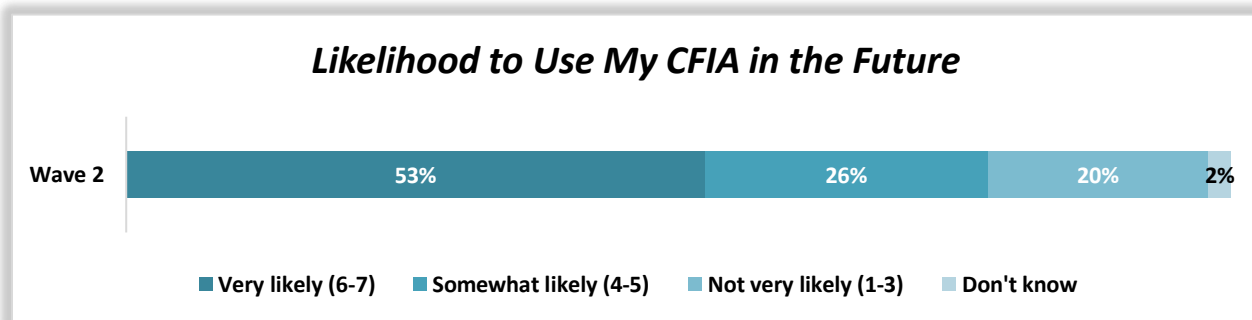


F2A. Please expand on why you provide that rating? Base: Businesses not exclusively in retail that have used "My CFIA" and that provided a satisfaction rating of 1 to 5, Wave 2: n=102, Wave 1 n=40.

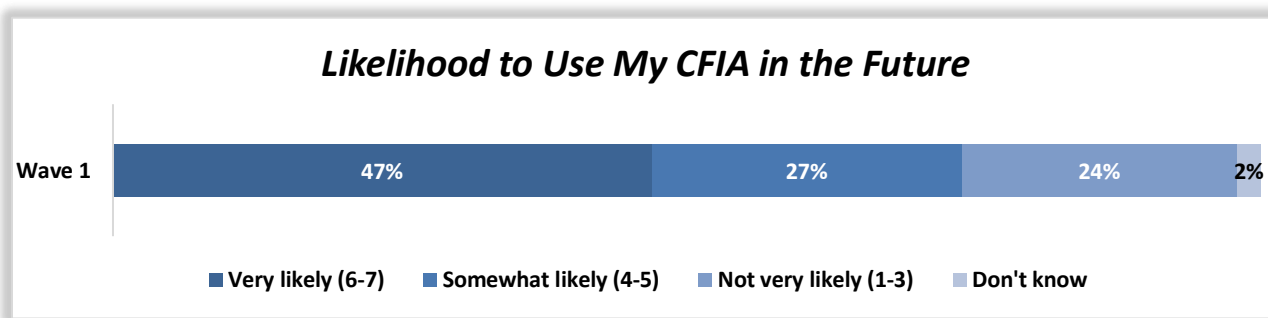
The study explored the likely use of My CFIA in the future. To make sure all respondents had at least some information about the portal, businesses not having read, seen or heard anything about My CFIA were provided the following overview of the portal:

My CFIA is a web portal that provides clients with secure access to a growing number of CFIA services online. It is a convenient and secure way to do business with the CFIA. My CFIA can be used to manage and track service requests online, including permissions such as licences, permits, registrations and export certificates. You can find it at inspection.gc.ca/mycfia.

Based on this description, a little over half (53%) of all businesses not exclusively in retail are very likely to use My CFIA in the future and another 26% are somewhat likely. Interest is weakest among businesses in the processor and manufacturer, wholesaler and distributor, and agriculture segments and is especially weak among retailers, small and micro businesses. These results and trends are similar to those obtained in Wave 1.



F3. How likely would you be to use “My CFIA” in the future on a scale of 17 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 2, n=500.



F3. How likely would you be to use “My CFIA” in the future on a scale of 17 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 1, n=370.

WAVE 2 - LIKELIHOOD TO USE MY CFIA IN THE FUTURE									
	Total (n=500)	Industry Sector				Company Size			
		Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Very likely (6-7)	53%	55%	67%	62%	35%	36%	42%	61%	73%
Somewhat likely (4-5)	26%	17%	18%	23%	36%	34%	33%	21%	13%
Not very likely (1-3)	20%	26%	14%	14%	26%	30%	22%	16%	11%
Don't know	2%	2%	1%	1%	2%	<1%	2%	2%	3%

F3. How likely would you be to use “My CFIA” in the future on a scale of 17 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 2 - LIKELIHOOD TO USE MY CFIA IN THE FUTURE					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Very likely (6-7)	53%	55%	47%	56%	51%
Somewhat likely (4-5)	26%	26%	27%	27%	23%
Not very likely (1-3)	20%	10%	25%	17%	23%
Don't know	2%	9%	1%	0%	2%

F3: How likely would you be to use "My CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - LIKELIHOOD TO USE MY CFIA IN THE FUTURE									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Very likely (6-7)	47%	44%	55%	50%	37%	42%	39%	52%	67%
Somewhat likely (4-5)	27%	28%	23%	29%	29%	25%	29%	27%	20%
Not very likely (1-3)	24%	28%	18%	19%	33%	33%	29%	18%	13%
Don't know	2%	-	4%	1%	1%	-	3%	3%	-

F3: How likely would you be to use "My CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 1, n=370.

WAVE 1 - LIKELIHOOD TO USE MY CFIA IN THE FUTURE					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Very likely (6-7)	47%	55%	42%	49%	46%
Somewhat likely (4-5)	27%	32%	29%	25%	28%
Not very likely (1-3)	24%	13%	28%	24%	24%
Don't know	2%	-	1%	2%	2%

F3: How likely would you be to use "My CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 1, n=370.

Results for likelihood to use the portal in the future were further analyzed based on whether or not the businesses had already signed up and, among those subscribed, whether or not they had actually used the portal.

Results show that the strongest likelihood to use the portal moving forward is among those who have actually signed up and used it in the past. Intentions are also robust among those who have signed up but have not made use of it yet as fully 63% indicated they would be very likely to use it moving forward. This analysis also suggests that the portal has some appeal among those who have not signed up or were not even aware of the portal. Fully 67% of these businesses indicated they would be either very or somewhat likely to use the portal in the future. These results are very similar to those observed in Wave 1.

WAVE 2- LIKELIHOOD TO USE MY CFIA IN THE FUTURE				
	Usage of My CFIA			
	Total (n=500)	Signed Up and Have Used It (n=183)	Signed Up but Have never used it (n=69)	Not aware, have not signed up (n=245)
Very likely (6-7)	53%	77%	63%	36%
Somewhat likely (4-5)	26%	15%	29%	31%
Not very likely (1-3)	20%	8%	7%	30%
Don't know	2%	1%	2%	3%

F3: How likely would you be to use "My CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1- LIKELIHOOD TO USE MY CFIA IN THE FUTURE				
	Usage of My CFIA			
	Total (n=370)	Signed Up and Have Used It (n=65)	Signed Up but Have never used it (n=55)	Not aware, have not signed up (n=246)
Very likely (6-7)	47%	75%	59%	40%
Somewhat likely (4-5)	27%	8%	17%	32%
Not very likely (1-3)	24%	14%	20%	26%
Don't know	2%	3%	4%	1%

F3: How likely would you be to use "My CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely? Base: Businesses not exclusively in retail, Wave 1, n=370.

Respondents were asked to expand on their "likelihood to use the portal" rating. Results in the grid below have been segmented based on future intentions. Businesses most likely to use the portal praise it for being easy to use and convenient as well as for the importance and usefulness of the information it provides. Many also seem to understand that using the portal is mandatory to submit registrations or licencing applications. Those somewhat likely to use the portal in the future will do so out of curiosity or because they are already using it, but an important proportion do not seem to feel there is a need for it. Finally, businesses the least likely to use the portal in the future basically believe they have no need for it. Results are similar from one research wave to the other.

WAVE 2 – REASONS FOR LIKELIHOOD RATING					
AMONG BUSINESSES VERY LIKELY TO USE THE PORTAL IN THE FUTURE (LIKELIHOOD RATING OF 6 OR 7)		AMONG BUSINESSES SOMEWHAT LIKELY TO USE THE PORTAL IN THE FUTURE (LIKELIHOOD RATING OF 4 OR 5)		AMONG BUSINESSES NOT VERY LIKELY TO USE THE PORTAL IN THE FUTURE (LIKELIHOOD RATING OF 1 TO 3)	
	n=284		n=108		n=99
Easy to use / convenient	43%	Curious / interested in using it	26%	No need (general)	57%
Mandatory - have to use for registration / licensing applications	25%	No need (general)	18%	No need - I don't have contact with CFIA	16%
Provides important / useful information	25%	Provides important / useful information	14%	Website isn't user-friendly	10%
Mandatory - have to use for information / regulations	15%	Easy to use / convenient	13%	I don't use the internet	7%
Will use it / continue to use it (general)	14%	Unfamiliar with the site / haven't used before	10%	Curious / interested in using it	4%
Curious / interested in using it	5%	Mandatory - have to use for registration / licensing applications	7%	Unfamiliar with the site / haven't used before	3%
Unfamiliar with the site / haven't used before	3%	Will use it / continue to use it (general)	5%	Mandatory - have to use for registration / licensing applications	3%
Website isn't user-friendly	2%	Website isn't user-friendly	3%	Mandatory - have to use for information / regulations	2%
I don't use the internet	1%	No need - I don't have contact with CFIA	3%	Will use it / continue to use it (general)	1%
No need (general)	1%	I don't use the internet	<1%	Easy to use / convenient	1%
No need - I don't have contact with CFIA	-	Mandatory - have to use for information / regulations	<1%	Provides important / useful information	1%
Other	3%	Other	7%	Other	2%
Don't know/ Refused	4%	Don't know/ Refused	22%	Don't know/ Refused	5%

F4: Please expand on why you provided that score. Base: Businesses not exclusively in retail that provided a valid "likelihood to use" rating, Wave 2, n=491.

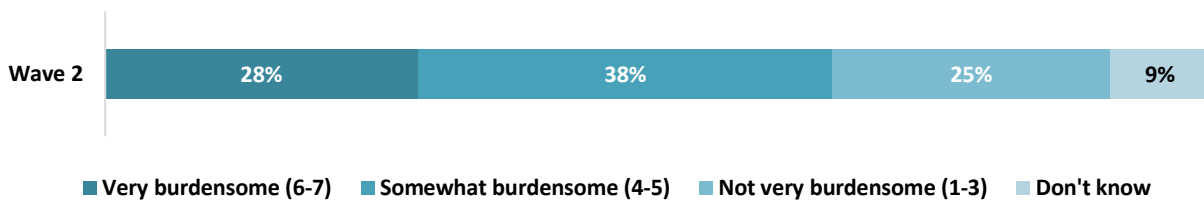
WAVE 1 – REASONS FOR LIKELIHOOD RATING					
AMONG BUSINESSES VERY LIKELY TO USE THE PORTAL IN THE FUTURE (LIKELIHOOD RATING OF 6 OR 7)		AMONG BUSINESSES SOMEWHAT LIKELY TO USE THE PORTAL IN THE FUTURE (LIKELIHOOD RATING OF 4 OR 5)		AMONG BUSINESSES NOT VERY LIKELY TO USE THE PORTAL IN THE FUTURE (LIKELIHOOD RATING OF 1 TO 3)	
	n=184		n=97		n=81
Provides important / useful information	26%	No need (general)	25%	No need (general)	56%
Easy to use / convenient	25%	Curious / interested in using it	15%	No need - I don't have contact with CFIA	7%
Mandatory - have to use for registration / licensing applications	23%	Will use it / continue to use it (general)	11%	I don't use the Internet	6%
Mandatory - have to use for information / regulations	23%	Unfamiliar with the site / haven't used before	10%	Website isn't user-friendly	5%
Curious / interested in using it	12%	Provides important / useful information	9%	Unfamiliar with the site / haven't used before	5%
Will use it / continue to use it (general)	9%	Mandatory - have to use for information / regulations	8%	Mandatory - have to use for information / regulations	4%
No need (general)	3%	Website isn't user-friendly	7%	Mandatory - have to use for registration / licensing applications	4%
Unfamiliar with the site / haven't used before	3%	Mandatory - have to use for registration / licensing applications	7%	Provides important / useful information	4%
Website isn't user-friendly	1%	I don't use the Internet	5%	Will use it / continue to use it (general)	2%
I don't use the Internet	1%	No need - I don't have contact with CFIA	4%	Curious / interested in using it	1%
Other	6%	Easy to use / convenient	2%	Easy to use / convenient	1%
Don't know/ Refused	1%	Other	4%	Other	6%

F4: Please expand on why you provided that score. Base: Businesses not exclusively in retail that provided a valid "likelihood to use" rating, Wave 1, n=362.

Compliance Burden

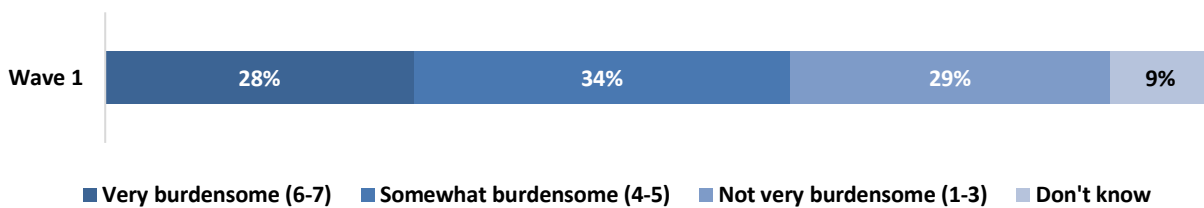
Based on the most recent wave of surveys, results reveal that over a quarter (28%) of businesses find the paperwork associated with food regulations very burdensome while one quarter (25%) find it not very burdensome. It is considered somewhat burdensome by 38% of businesses not exclusively in retail. These results are very similar to what was observed in Wave 1.

Burden of Paperwork with Food Regulations



G1: On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? Base: Businesses not exclusively in retail, Wave 2, n=500.

Burden of Paperwork with Food Regulations



G1: On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? Base: Businesses not exclusively in retail, Wave 1, n=370.

Wave 2 results across all subgroups are relatively the same.

In Wave 1, results among those in the retail vertical stand apart in terms of how many feel the paperwork is not very burdensome (45%) while only 15% consider it very burdensome. In terms of company size, small and medium-sized businesses were the most likely to consider the paperwork very burdensome although it should be noted that 19% of micro businesses did not know how to answer. From a regional perspective, businesses in Ontario were the most likely to feel the paperwork is very burdensome (36%).

WAVE 2 - BURDEN OF PAPERWORK WITH FOOD REGULATIONS									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Very burdensome (6-7)	28%	35%	32%	27%	25%	26%	23%	35%	23%
Somewhat burdensome (4-5)	38%	39%	38%	39%	35%	41%	38%	35%	39%
Not very burdensome (1-3)	25%	23%	22%	24%	28%	24%	20%	25%	35%
Don't know	9%	3%	8%	10%	11%	9%	19%	5%	4%

G1: On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 2 - BURDEN OF PAPERWORK WITH FOOD REGULATIONS					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Very burdensome (6-7)	28%	22%	24%	28%	33%
Somewhat burdensome (4-5)	38%	30%	46%	41%	28%
Not very burdensome (1-3)	25%	33%	22%	24%	27%
Don't know	9%	15%	8%	6%	13%

G1: On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? Base: Businesses not exclusively in retail, Wave 2, n=500.

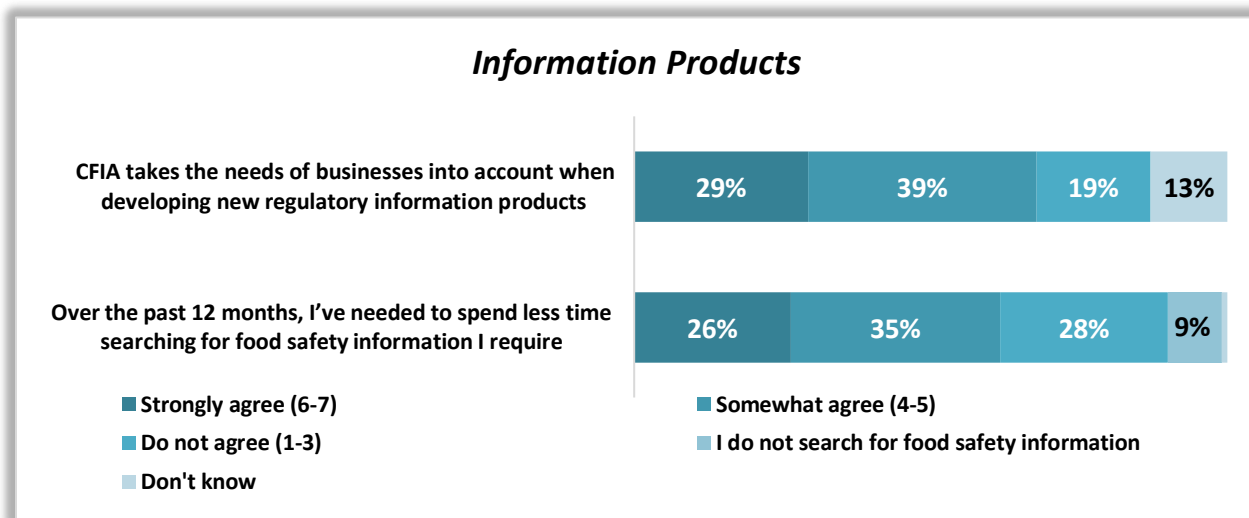
WAVE 1 - BURDEN OF PAPERWORK WITH FOOD REGULATIONS									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Very burdensome (6-7)	28%	32%	32%	34%	15%	15%	32%	33%	21%
Somewhat burdensome (4-5)	34%	31%	42%	35%	26%	32%	31%	35%	47%
Not very burdensome (1-3)	29%	29%	23%	19%	45%	34%	26%	27%	31%
Don't know	9%	8%	3%	12%	13%	19%	11%	4%	-

G1: On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? Base: Businesses not exclusively in retail, Wave 1, n=370.

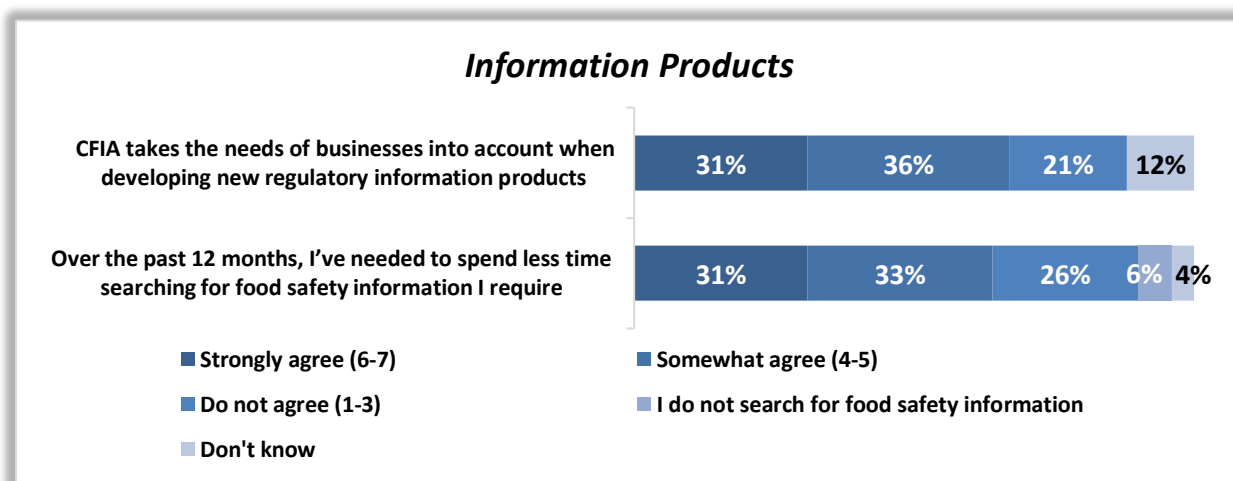
WAVE 1 - BURDEN OF PAPERWORK WITH FOOD REGULATIONS					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Very burdensome (6-7)	28%	20%	16%	36%	26%
Somewhat burdensome (4-5)	34%	51%	34%	31%	35%
Not very burdensome (1-3)	29%	27%	36%	25%	31%
Don't know	9%	2%	14%	8%	8%

G1: On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? Base: Businesses not exclusively in retail, Wave 1, n=370.

Nearly one in three businesses not exclusively in retail (29%) strongly agree that CFIA takes the needs of businesses into account when developing new information products, and a similar proportion (26%) strongly agrees that over the past 12 months they have spent less time searching for food safety information. Results for these two metrics are quite consistent across industry verticals. There is a more noted trend when it comes to company size where results reveal a relatively higher proportion of large businesses strongly agreeing that, over the past 12 months, they've spent less time searching for food safety information they require (48%). Medium-sized companies are more inclined than others to somewhat agree with this statement. For both statements, small businesses are more likely than larger companies to indicate they do not search for food safety information. These results are similar to those obtained in Wave 1.



G1A/G1B: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”. Base: Businesses not exclusively in retail, Wave 2, n=500.



G1A/G1B: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”. Base: Businesses not exclusively in retail, Wave 1, n=370.

WAVE 2 - INFORMATION PRODUCTS									
	Industry Sector					Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
CFIA takes the needs of businesses into account when developing new regulatory information products									
Strongly agree (6-7)	29%	24%	28%	35%	29%	21%	34%	29%	37%
Somewhat agree (4-5)	39%	43%	44%	35%	36%	43%	30%	39%	46%
Do not agree (1-3)	19%	17%	17%	22%	20%	19%	22%	22%	9%
Don't know	13%	17%	11%	8%	16%	18%	14%	10%	8%
Over the past 12 months, I've needed to spend less time searching for food safety information I require									
Strongly agree (6-7)	26%	21%	29%	26%	27%	20%	22%	33%	26%
Somewhat agree (4-5)	35%	32%	38%	33%	36%	41%	35%	32%	36%
Do not agree (1-3)	28%	36%	27%	26%	28%	27%	26%	28%	34%
I do not search for food safety information	9%	6%	5%	14%	10%	11%	15%	6%	4%
Don't know	1%	4%	2%	2%	-	2%	2%	1%	1%

G1A/G1B: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree". Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - INFORMATION PRODUCTS									
	Industry Sector					Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Over the past 12 months, I've needed to spend less time searching for food safety information I require									
Strongly agree (6-7)	31%	36%	32%	25%	32%	31%	27%	30%	48%
Somewhat agree (4-5)	33%	27%	38%	39%	23%	31%	30%	37%	20%
Do not agree (1-3)	26%	28%	24%	21%	35%	18%	32%	27%	26%
I do not search for food safety information	6%	7%	3%	8%	8%	16%	8%	2%	-
Don't know	4%	2%	3%	7%	3%	4%	3%	4%	6%
CFIA takes the needs of businesses into account when developing new regulatory information products									
Strongly agree (6-7)	31%	31%	31%	32%	30%	29%	28%	33%	38%
Somewhat agree (4-5)	36%	36%	39%	39%	30%	29%	30%	42%	42%
Do not agree (1-3)	21%	25%	19%	19%	22%	23%	24%	19%	18%
Don't know	12%	7%	10%	10%	18%	19%	18%	6%	3%

G1A/G1B: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree". Base: Businesses not exclusively in retail, Wave 1, n=370.

Regional results for these two metrics are also quite consistent. Companies in Western Canada are more likely to disagree that they needed to spend less time searching for food safety information in the past 12 months. In Wave 1, Quebec companies stand apart from those in other regions in that they are less likely to “strongly agree” with both metrics.

WAVE 2 - INFORMATION PRODUCTS					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
CFIA takes the needs of businesses into account when developing new regulatory information products					
Strongly agree (6-7)	29%	41%	28%	27%	32%
Somewhat agree (4-5)	39%	33%	40%	43%	34%
Do not agree (1-3)	19%	18%	17%	19%	21%
Don't know	13%	8%	15%	12%	13%
Over the past 12 months, I've needed to spend less time searching for food safety information I require					
Strongly agree (6-7)	26%	27%	27%	27%	25%
Somewhat agree (4-5)	35%	37%	28%	43%	29%
Do not agree (1-3)	28%	25%	29%	22%	36%
I do not search for food safety information	9%	8%	13%	7%	9%
Don't know	1%	3%	2%	1%	1%

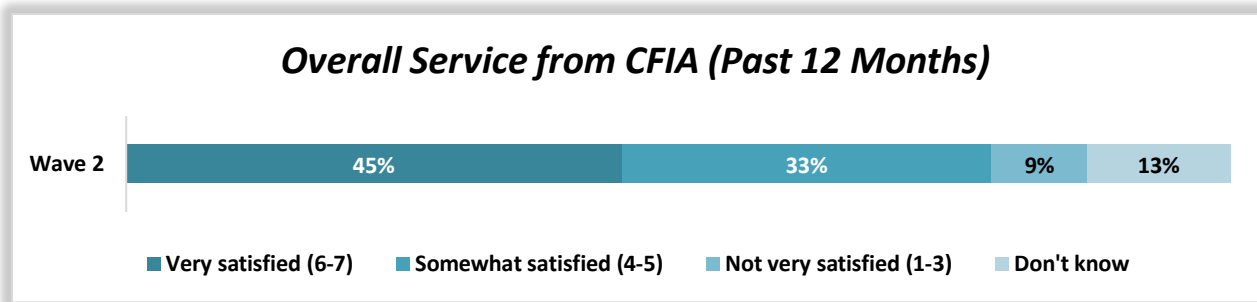
G1A/G1B: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - INFORMATION PRODUCTS					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Over the past 12 months, I've needed to spend less time searching for food safety information I require					
Strongly agree (6-7)	31%	37%	19%	35%	31%
Somewhat agree (4-5)	33%	30%	27%	35%	33%
Do not agree (1-3)	26%	28%	39%	21%	27%
I do not search for food safety information	6%	2%	10%	6%	6%
Don't know	4%	3%	4%	3%	4%
CFIA takes the needs of businesses into account when developing new regulatory information products					
Strongly agree (6-7)	31%	35%	19%	34%	34%
Somewhat agree (4-5)	36%	52%	39%	36%	33%
Do not agree (1-3)	21%	13%	30%	19%	21%
Don't know	12%	-	13%	12%	13%

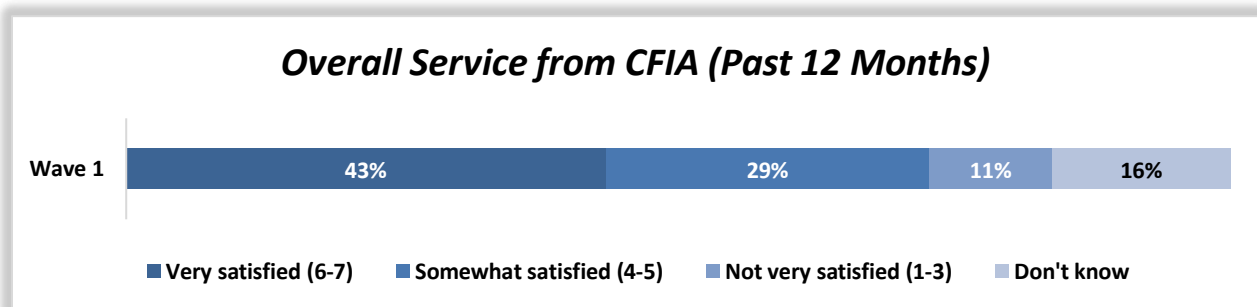
G1A/G1B: With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”. Base: Businesses not exclusively in retail, Wave 1, n=370.

Overall Satisfaction with CFIA

Over 2 in 5 respondents (45%) felt very satisfied with the overall service received from CFIA in the past 12 months. Another 33% were somewhat satisfied and roughly 1 in 10 were not very satisfied. An important proportion (13%) did not provide a rating, possibly because they had not interacted with CFIA over the past 12 months or they never interact with CFIA. Results from Wave 1 are similar to these results.



G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, Wave 2, n=500.



G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, Wave 1, n=370.

Satisfaction ratings are consistent across industry sectors. A noteworthy proportion of micro and small businesses “don’t know” CFIA well enough to provide a rating, although it is also worth noting that 15% of micro businesses indicated they were not very satisfied. In Wave 1, medium and large business satisfaction levels were fairly strong, especially among large companies where 65% indicated they were very satisfied.

WAVE 2 - OVERALL SERVICE FROM CFIA (PAST 12 MONTHS)									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Very satisfied (6-7)	45%	42%	52%	47%	40%	40%	47%	42%	57%
Somewhat satisfied (4-5)	33%	38%	31%	31%	35%	28%	26%	40%	37%
Not very satisfied (1-3)	9%	7%	7%	7%	11%	15%	6%	8%	3%
Don't know	13%	13%	10%	15%	14%	17%	21%	10%	3%

G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - OVERALL SERVICE FROM CFIA (PAST 12 MONTHS)									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Very satisfied (6-7)	43%	36%	50%	44%	39%	31%	38%	48%	65%
Somewhat satisfied (4-5)	29%	36%	31%	29%	24%	35%	20%	33%	29%
Not very satisfied (1-3)	11%	8%	9%	14%	14%	7%	18%	10%	5%
Don't know	16%	20%	10%	13%	24%	27%	24%	9%	-

G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, n=370.

As with Wave 1, regional results show that satisfaction ratings are strong in Atlantic Canada. Sixty-five percent of respondents indicated they were very satisfied. Quebec businesses stand apart from the other regions especially because 24% “don’t know” CFIA well enough to provide a rating.

WAVE 2 - OVERALL SERVICE FROM CFIA (PAST 12 MONTHS)					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Very satisfied (6-7)	45%	65%	43%	43%	45%
Somewhat satisfied (4-5)	33%	21%	26%	37%	36%
Not very satisfied (1-3)	9%	5%	7%	11%	7%
Don't know	13%	8%	24%	9%	12%

G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - OVERALL SERVICE FROM CFIA (PAST 12 MONTHS)					
		Region			
	Total (n=370)	Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Very satisfied (6-7)	43%	62%	27%	47%	43%
Somewhat satisfied (4-5)	29%	33%	30%	27%	30%
Not very satisfied (1-3)	11%	3%	5%	13%	14%
Don't know	16%	2%	37%	12%	13%

G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, n=370.

Satisfaction ratings were also analyzed based on whether or not a business had been inspected by CFIA over the past 12 months. Results show that satisfaction ratings increase among those who have been inspected. Fully 60% of these businesses are very satisfied and another 34% are somewhat satisfied. Among those who have not been inspected, 34% are very satisfied and 33% are somewhat satisfied however fully 22% did not know how to rate CFIA. A similar pattern was observed from Wave 1 results.

WAVE 2 - OVERALL SERVICE FROM CFIA (PAST 12 MONTHS)			
		Inspected by CFIA	
	Total (n=500)	Have been (n=219)	Have not been (n=281)
Very satisfied (6-7)	45%	60%	34%
Somewhat satisfied (4-5)	33%	34%	33%
Not very satisfied (1-3)	9%	5%	11%
Don't know	13%	1%	22%

G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - OVERALL SERVICE FROM CFIA (PAST 12 MONTHS)			
		Inspected by CFIA	
	Total (n=370)	Have been (n=189)	Have not been (n=181)
Very satisfied (6-7)	43%	63%	26%
Somewhat satisfied (4-5)	29%	29%	30%
Not very satisfied (1-3)	11%	7%	15%
Don't know	16%	1%	29%

G2: Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied. Base: Businesses not exclusively in retail, n=370.

Respondents were asked to expand on their satisfaction rating. Results in the grid on the next page have been presented based on respondent satisfaction segments. Those who indicated “don’t know” when asked to rate their satisfaction with CFIA are not included in this analysis.

The quality of customer service, high quality of information provided by CFIA, and its responsive service all seem to be key satisfaction drivers. Among those “very satisfied”, 43% provided this rating because they felt CFIA is helpful and provides good customer service, 20% because of the high quality information CFIA provided and another 20% because the service is seen as responsive. In addition, 29% of these respondents have had no problems or issues with CFIA’s service that would otherwise lead them to provide a lower rating.

Among those who were “somewhat satisfied”, we start seeing room for improvement becoming a prominent reason behind the rating. The quality of the customer service is also a factor, with some indicating it is positive and others indicating the service is poor. We also see more respondents indicating they require more information and have not heard from CFIA and that it is difficult to keep up with regulations and processes.

Finally, those the least satisfied especially argue for better customer service, more information from CFIA and that it is difficult to keep up with regulations and processes.

Many in the two lowest satisfaction segments (19% and 44% respectively) did not provide an explanation for their satisfaction rating. These results and trends are very similar to those obtained in Wave 1.

WAVE 2- REASONS FOR RATING					
AMONG BUSINESSES VERY SATISFIED WITH CFIA		AMONG BUSINESSES SOMEWHAT SATISFIED WITH CFIA		AMONG BUSINESSES NOT VERY SATISFIED WITH CFIA	
(SATISFACTION RATING OF 6 OR 7)		(SATISFACTION RATING OF 4 OR 5)		(SATISFACTION RATING OF 1 TO 3)	
	n=232		n=161		n=38
Helpful / good customer service	43%	Require more information / haven't heard from them	23%	Difficult to keep up with regulations / process	19%
No problems / no issues	29%	Difficult to keep up with regulations / process	18%	Require more information / haven't heard from them	17%
High quality of information provided	20%	Unhelpful / poor customer service	13%	Unhelpful / poor customer service	16%
Responsive service	20%	Helpful / good customer service	13%	No problems / no issues	7%
Require more information / haven't heard from them	8%	No problems / no issues	11%	Room for improvement (general)	5%
Room for improvement (general)	7%	Room for improvement (general)	11%	Helpful / good customer service	3%
Unhelpful / poor customer service	2%	High quality of information provided	10%	Room for improvement - website	2%
Difficult to keep up with regulations / process	1%	Room for improvement - website	6%	Other	3%
Room for improvement - website	1%	Responsive service	6%	Don't know/ Refused	44%
Other	4%	Other	9%		
Don't know/ Refused	9%	Don't know/ Refused	19%		

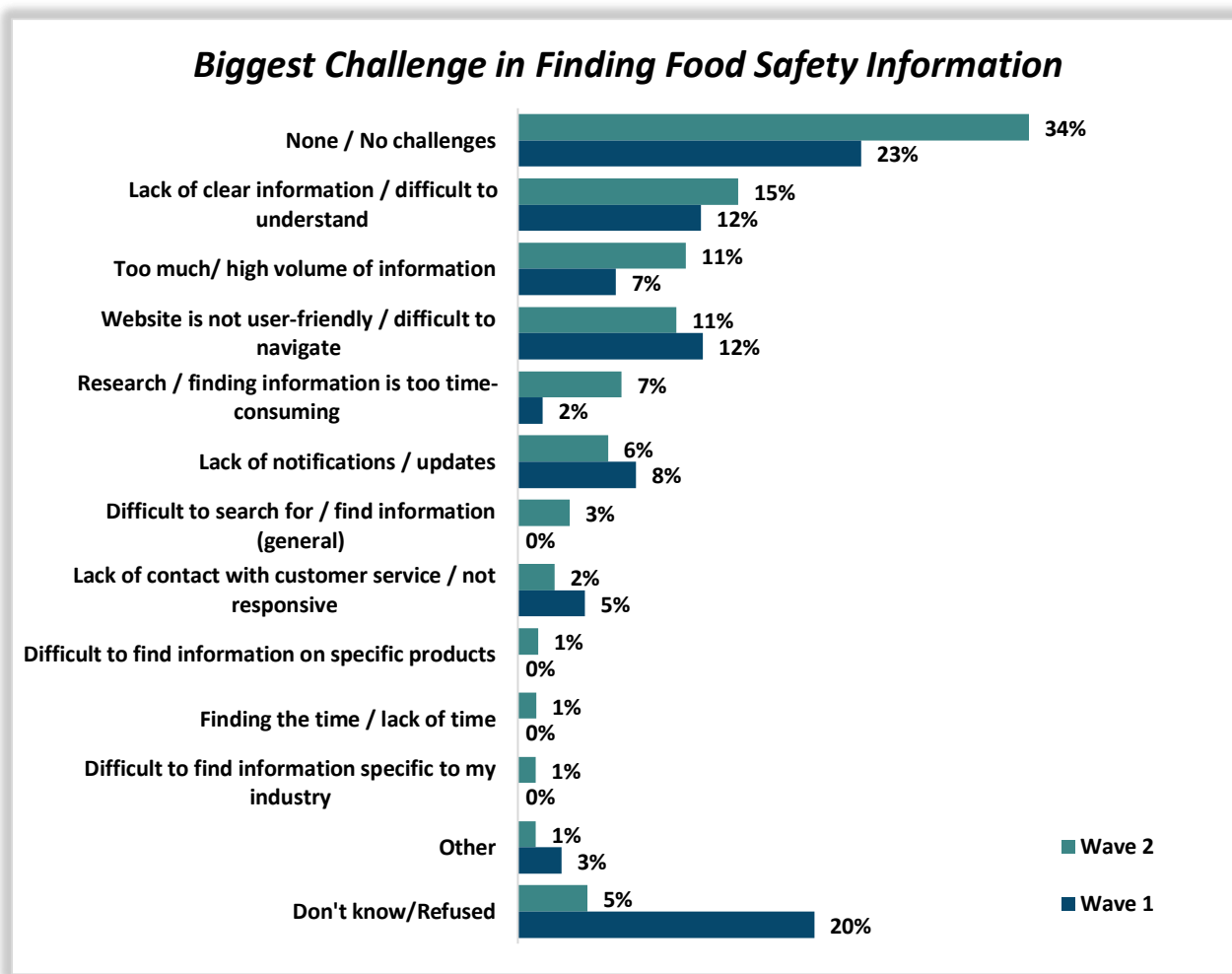
G3: Please expand on why you provided that score. Base: Businesses not exclusively in retail that provided a valid satisfaction rating, Wave 2 n=413.

WAVE 1 - REASONS FOR RATING					
AMONG BUSINESSES VERY SATISFIED WITH CFIA (SATISFACTION RATING OF 6 OR 7)		AMONG BUSINESSES SOMEWHAT SATISFIED WITH CFIA (SATISFACTION RATING OF 4 OR 5)		AMONG BUSINESSES NOT VERY SATISFIED WITH CFIA (SATISFACTION RATING OF 1 TO 3)	
n=169		n=110		n=39	
Helpful / good customer service	50%	Room for improvement (general)	20%	Unhelpful / poor customer service	21%
No problems / no issues	23%	Unhelpful / poor customer service	18%	Require more information / haven't heard from them	18%
High quality of information provided	21%	Helpful / good customer service	12%	Difficult to keep up with regulations / process	17%
Responsive service	17%	Require more information / haven't heard from them	11%	Helpful / good customer service	7%
Room for improvement (general)	7%	Difficult to keep up with regulations / process	10%	Room for improvement (general)	4%
Require more information / haven't heard from them	6%	Responsive service	9%	Room for improvement - website	1%
Unhelpful / poor customer service	4%	No problems / no issues	8%	Other	2%
Difficult to keep up with regulations / process	3%	High quality of information provided	6%	Don't know/ Refused	38%
Room for improvement - website	2%	Room for improvement - website	4%		
Other	3%	Other	4%		
Don't know/ Refused	6%	Don't know/ Refused	20%		

G3: Please expand on why you provided that score. Base: Businesses not exclusively in retail that provided a valid satisfaction rating, Wave 1, n=318.

Finding Food Safety Information

Roughly one in three (34%) respondents indicate that they do not have any challenges when it comes to finding this kind of information. The main challenges for businesses when it comes to finding food safety information are the lack of clear information (15%), too much information (11%), and the CFIA website not being easy to navigate (11%). Other common challenges included the time-consuming nature of researching information, and the lack of notifications, among others.



G4: In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements. Base: Businesses not exclusively in retail, Wave, n=500, Wave 1, n=370.

When it comes to finding information on food safety regulations or requirements, businesses in the processor or manufacturer sector, and those in the agriculture sector are more likely to face the challenge of lack of information or feeling the information is difficult to understand. Businesses in the processor and manufacturer sector are also more likely to find the website not user friendly and feel the task is time-consuming.

In terms of business size, challenges with the high volume of information available pose a challenge to small- and medium-sized businesses.

WAVE 2 - BIGGEST CHALLENGE IN FINDING FOOD SAFETY INFORMATION									
		Industry Sector				Company Size			
	Total (n=500)	Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
Lack of clear information / difficult to understand	15%	20%	22%	15%	8%	12%	9%	18%	19%
Too much information / high volume of information	11%	6%	8%	13%	15%	10%	13%	14%	3%
Website is not user-friendly / difficult to navigate	11%	11%	17%	7%	8%	9%	9%	11%	13%
Research / finding information is too time-consuming	7%	2%	9%	7%	7%	4%	7%	9%	4%
Lack of notifications / updates	6%	3%	4%	4%	10%	9%	7%	3%	10%
Difficult to search for / find information (general)	3%	3%	5%	2%	3%	4%	1%	4%	4%
Lack of contact with customer service / not responsive	2%	2%	4%	5%	-	2%	1%	4%	2%
Difficult to find information on specific products	1%	-	2%	-	2%	-	4%	1%	1%
Finding the time / lack of time	1%	4%	1%	-	1%	1%	2%	1%	1%
Difficult to find information specific to my industry	1%	1%	1%	3%	-	-	1%	2%	2%
Difficult to find import / export information	<1%	2%	-	-	-	-	-	-	1%
Other	1%	3%	1%	1%	1%	3%	-	2%	-
None / No challenges	34%	34%	23%	39%	39%	44%	36%	28%	35%
Don't Know/Refused	5%	8%	3%	4%	5%	2%	9%	3%	4%

G4: In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - BIGGEST CHALLENGE IN FINDING FOOD SAFETY INFORMATION									
		Industry Sector				Company Size			
	Total (n=370)	Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
Difficult to search for / find information (general)	18%	13%	22%	20%	15%	16%	18%	19%	18%
Website isn't user-friendly / is difficult to navigate	12%	11%	12%	13%	12%	6%	11%	14%	23%
Lack of clear information / difficult to understand	12%	24%	10%	13%	7%	10%	11%	14%	15%
Lack of notifications / updates	8%	10%	7%	7%	9%	2%	12%	9%	4%
Too much information / high volume of information	7%	5%	8%	8%	4%	6%	2%	9%	7%
Lack of contact with customer service / not responsive	5%	4%	5%	6%	2%	7%	5%	3%	7%
Difficult to find information on specific products	4%	3%	7%	2%	5%	8%	1%	4%	8%
Difficult to find information specific to my industry	3%	5%	5%	3%	-	3%	1%	5%	3%
Difficult to find import / export information	3%	5%	3%	2%	2%	4%	2%	2%	6%
Finding the time / lack of time	2%	2%	2%	1%	5%	3%	4%	1%	3%
Research / finding information is too time-consuming	2%	-	2%	4%	-	4%	1%	1%	-
Other	3%	2%	2%	-	7%	5%	2%	3%	-
None / no challenges	23%	21%	23%	24%	23%	21%	25%	24%	16%
Don't know/ Refused	20%	21%	15%	25%	20%	24%	20%	19%	15%

G4: In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements. Base: Businesses not exclusively in retail, Wave 1, n=370.

Only a few differences stand out across regions. Too much information and lack of notifications are more of a challenge for businesses in Ontario (15%), while the time-consuming nature of finding information is a challenge for businesses in Quebec (15%).

WAVE 2 - BIGGEST CHALLENGE IN FINDING FOOD SAFETY INFORMATION					
		Region			
	Total (n=500)	Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
Lack of clear information / difficult to understand	15%	13%	15%	17%	12%
Too much information / high volume of information	11%	4%	7%	15%	11%

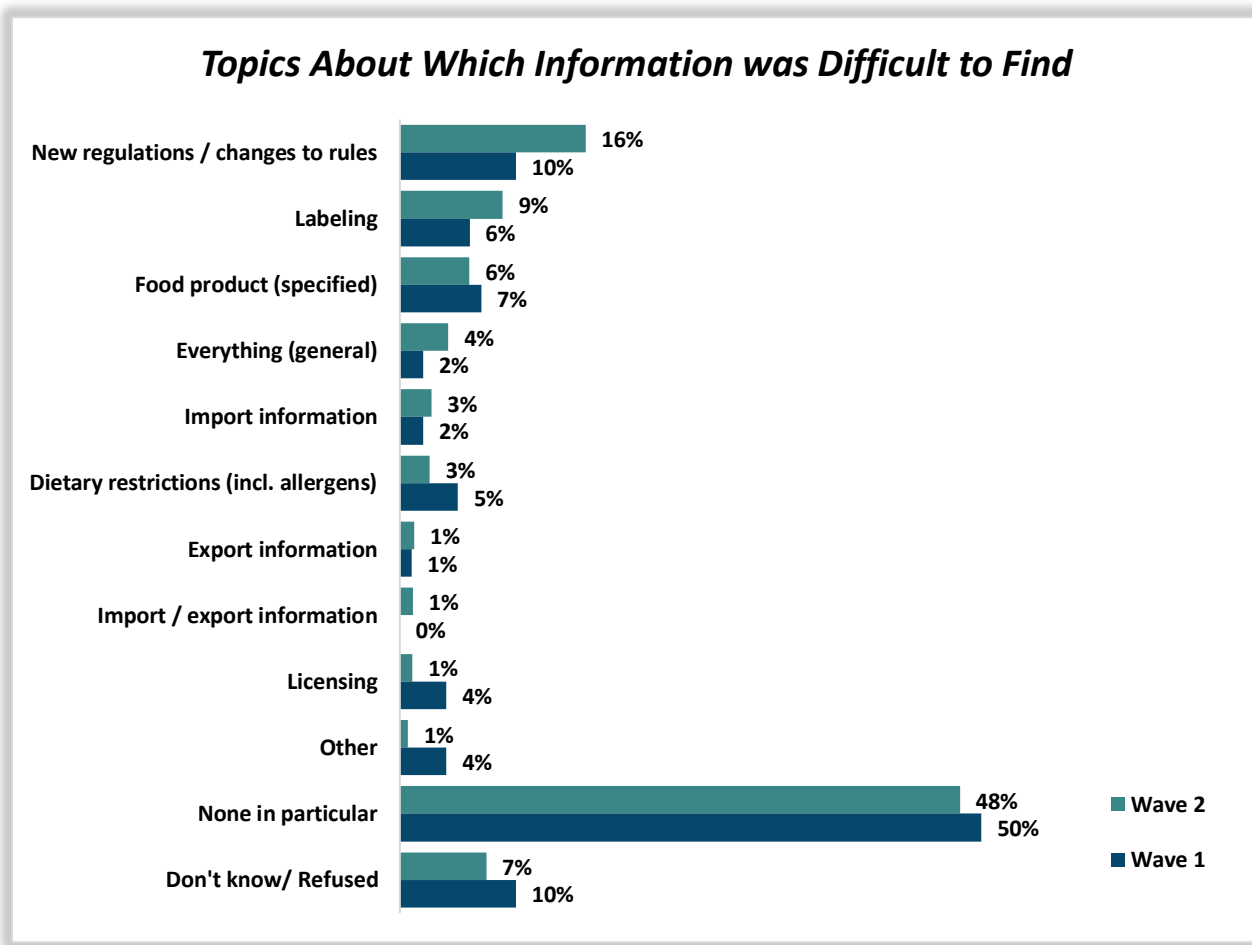
Website is not user-friendly / difficult to navigate	11%	17%	8%	9%	13%
Research / finding information is too time-consuming	7%	5%	15%	6%	4%
Lack of notifications / updates	6%	3%	2%	9%	5%
Difficult to search for / find information (general)	3%	3%	7%	2%	4%
Lack of contact with customer service / not responsive	2%	1%	4%	2%	3%
Difficult to find information on specific products	1%	2%	<1%	2%	1%
Finding the time / lack of time	1%	6%	2%	<1%	<1%
Difficult to find information specific to my industry	1%	-	2%	1%	2%
Difficult to find import / export information	<1%	-	-	<1%	-
Other	1%	-	1%	<1%	2%
None / No challenges	34%	31%	34%	33%	38%
Don't Know/Refused	5%	14%	3%	4%	5%

G4: In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements. Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - BIGGEST CHALLENGE IN FINDING FOOD SAFETY INFORMATION					
	Total (n=370)	Region			
		Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
Difficult to search for / find information (general)	18%	21%	24%	17%	16%
Website isn't user-friendly / is difficult to navigate	12%	24%	10%	14%	10%
Lack of clear information / difficult to understand	12%	12%	6%	16%	11%
Lack of notifications / updates	8%	12%	7%	9%	7%
Too much information / high volume of information	7%	13%	3%	6%	8%
Lack of contact with customer service / not responsive	5%	2%	4%	5%	5%
Difficult to find information on specific products	4%	-	3%	6%	5%
Difficult to find information specific to my industry	3%	-	1%	4%	4%
Difficult to find import / export information	3%	3%	3%	2%	3%
Finding the time / lack of time	2%	-	-	3%	3%
Research / finding information is too time-consuming	2%	-	1%	2%	2%
Other	3%	-	5%	-	6%
None / no challenges	23%	19%	36%	18%	23%
Don't know/ Refused	20%	16%	14%	25%	17%

G4: In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements. Base: Businesses not exclusively in retail, Wave 1, n=370.

When asked specifically to identify the topics for which information was difficult to find, nearly half (48%) of all respondents felt there was no topic in particular. Some topics identified included new regulations or changes to rules (16%), labelling (9%), and food products (6%).



G4A: What were some of the food safety topics you felt were difficult to get clear information on? Base: Businesses not exclusively in retail, Wave 2, n=500, Wave 1, n=370.

Businesses in the processor or manufacturer sector are more likely to say it is difficult to find food product information and export information. Businesses in the agricultural sector are more likely to say there is no topic in particular that is challenging, while those in the wholesale or distribution sector are more likely to say everything was difficult to find.

Micro-, small- and medium-sized businesses are more likely to say labeling information was difficult to find, compared to large companies.

WAVE 2 - TOPICS ABOUT WHICH INFORMATION WAS DIFFICULT TO FIND									
	Total (n=500)	Industry Sector				Company Size			
		Agriculture (n=99)	Processor/ Manufacturer (n=198)	Wholesaler/ Distributor (n=137)	Retailer (n=66)	Micro (n=98)	Small (n=105)	Medium (n=224)	Large (n=70)
New regulations / changes to rules	16%	11%	16%	17%	17%	20%	14%	14%	19%
Labeling	9%	4%	8%	6%	13%	10%	9%	11%	2%
Food product (specified)	6%	4%	10%	9%	2%	5%	6%	8%	2%
Everything (general)	4%	6%	4%	8%	1%	2%	6%	6%	2%
Import information	3%	<1%	3%	3%	4%	2%	4%	3%	2%
Dietary restrictions (incl. allergens)	3%	-	6%	4%	-	2%	2%	3%	4%
Export information	1%	-	4%	<1%	-	-	-	2%	3%
Import / export information	1%	4%	1%	1%	-	-	-	1%	4%
Licensing	1%	3%	2%	1%	-	1%	-	2%	2%
Other	1%	-	1%	-	1%	3%	<1%	-	-
None in particular	48%	59%	42%	46%	50%	52%	51%	44%	48%
Don't know/ Refused	7%	8%	3%	5%	12%	5%	8%	7%	12%

G4A: What were some of the food safety topics you felt were difficult to get clear information on? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - TOPICS ABOUT WHICH INFORMATION WAS DIFFICULT TO FIND									
	Total (n=370)	Industry Sector				Company Size			
		Agriculture (n=49)	Processor/ Manufacturer (n=170)	Wholesaler/ Distributor (n=87)	Retailer (n=64)	Micro (n=63)	Small (n=90)	Medium (n=179)	Large (n=37)
New regulations / changes to rules	10%	5%	18%	8%	4%	4%	4%	13%	28%
Food product (specified)	7%	7%	7%	9%	7%	7%	9%	7%	5%
Labeling	6%	3%	9%	7%	1%	3%	6%	6%	6%
Dietary restrictions (incl. allergens)	5%	-	7%	4%	5%	2%	5%	7%	-
Licensing	4%	4%	4%	5%	2%	3%	3%	5%	-
Everything (general)	2%	-	1%	2%	5%	-	5%	1%	2%
Import information	2%	2%	2%	2%	2%	5%	1%	1%	3%
Export information	1%	1%	2%	-	-	-	1%	1%	-
Other	4%	7%	2%	6%	4%	1%	6%	4%	5%
None in particular	50%	51%	37%	52%	64%	65%	47%	46%	44%
Don't know/ Refused	10%	20%	12%	7%	6%	10%	13%	9%	7%

G4A: What were some of the food safety topics you felt were difficult to get clear information on? Base: Businesses not exclusively in retail, Wave 1, n=370.

Other than information on new regulations and changes to rules in Ontario and Western Canada, there are no other noteworthy differences from a regional perspective.

WAVE 2 - TOPICS ABOUT WHICH INFORMATION WAS DIFFICULT TO FIND					
	Total (n=500)	Region			
		Atlantic (n=47)	Quebec (n=150)	Ontario (n=134)	West (n=169)
New regulations / changes to rules	16%	13%	7%	16%	22%
Labeling	9%	8%	6%	11%	8%
Food product (specified)	6%	5%	9%	6%	4%
Everything (general)	4%	5%	6%	3%	4%
Import information	3%	4%	3%	4%	0%
Dietary restrictions (incl. allergens)	3%	1%	1%	5%	1%
Export information	1%	-	1%	2%	1%
Import / export information	1%	5%	0%	1%	1%
Licensing	1%	-	1%	2%	1%
Other	1%	-	3%	-	-
None in particular	48%	48%	55%	42%	53%
Don't know/ Refused	7%	10%	6%	10%	4%

G4A: What were some of the food safety topics you felt were difficult to get clear information on? Base: Businesses not exclusively in retail, Wave 2, n=500.

WAVE 1 - TOPICS ABOUT WHICH INFORMATION WAS DIFFICULT TO FIND					
	Total (n=370)	Region			
		Atlantic (n=40)	Quebec (n=59)	Ontario (n=106)	West (n=165)
New regulations / changes to rules	10%	5%	11%	6%	14%
Food product (specified)	7%	13%	6%	8%	6%
Labeling	6%	9%	6%	6%	4%
Dietary restrictions (incl. allergens)	5%	-	2%	7%	5%
Licensing	4%	-	-	7%	2%
Everything (general)	2%	1%	5%	1%	1%
Import information	2%	-	3%	1%	3%
Export information	1%	3%	-	-	1%
Other	4%	1%	-	6%	5%
None in particular	50%	57%	56%	48%	48%
Don't know/ Refused	10%	10%	11%	10%	11%

G4A: What were some of the food safety topics you felt were difficult to get clear information on? Base: Businesses not exclusively in retail, Wave 1, n=370.

Study Participant Profile

A variety of questions were asked to study participants to obtain information on their business. This information not only allowed the research team to understand the profile of those participating in the study, but also to weight the data and ensure results are representative of the population.

NOTE: ALL RESULTS IN THIS SECTION ARE WEIGHTED.

WAVE 2 - BUSINESS PROFILE			
Region	Total (n=700)	Business Activities	Total (n=700)
Atlantic Canada (NET)	7%	Sell food products at retail directly to consumers	76%
Newfoundland & Labrador	2%	Import food products	25%
Prince Edward Island	1%	Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors)	25%
Nova Scotia	3%	Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial boundaries	25%
New Brunswick	2%	Grade, label or package food for export or to be sent across provincial or territorial boundaries	19%
Quebec	23%	Export food products or prepare food for export	14%
Ontario	36%	Produce organic food [includes: organic meats, dairy, etc.]	11%
West (NET)	34%	Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries	6%
Manitoba	4%	Company Size	
Saskatchewan	4%	1 (Self-employed)	7%
Alberta	12%	2-4 employees	21%
British Columbia	14%	5-10 employees	28%
Nunavut	<1%	11-99 employees	36%
Northwest Territories	-	100-499 employees	6%
Type of Business		500 employees or more	2%
Retailer	61%	Don't know	<1%
Processor or Manufacturer	17%	Gross Annual Revenue	
Wholesaler or distributor	14%	\$30,000 or less per year	2%
Agriculture	8%	Between \$30,000 and less than \$100,000 per year	11%
Indigenous		Between \$100,000 and less than \$500,000 per year	17%
Yes	6%	Between \$500,000 and less than \$1 million per year	14%
No	92%	Between \$1 million and less than \$5 million per year	21%
Don't know/Not sure	2%	\$5 million or more per year	11%
Import locations		Don't know	19%
United States	75%	Refused	5%
Western Europe	40%	Export locations	
Asia (Pacific)	27%	United States	93%
Central America/ Caribbean	27%	Asia (Pacific)	24%
China	21%	Western Europe	21%
South America	21%	China	20%
Eastern Europe	16%	Eastern Europe	14%
India	12%	Central America/ Caribbean	13%
Australia	12%	South America	11%
Middle East	9%	Africa	6%
Africa	8%	Australia	6%
		Middle East	5%
		India	3%

WAVE 1- BUSINESS PROFILE			
Region	Total (n=670)	Business Activities	Total (n=670)
Atlantic Canada (NET)	7%	Sell food products at retail directly to consumers	78%
Newfoundland & Labrador	2%	Import food products	23%
Prince Edward Island	1%	Send or convey food products across provincial or territorial borders (wholesaler/ distributors)	21%
Nova Scotia	3%	Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	16%
New Brunswick	2%	Export food products or prepare food for export	16%
Quebec	23%	Grade, label or package food for export or to be sent across provincial or territorial borders	14%
Ontario	36%	Produce organic food [includes: organic meats, dairy, etc.]	8%
West (NET)	34%	Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	4%
Manitoba	4%	Company Size	
Saskatchewan	4%	1 (Self-employed)	4%
Alberta	12%	2-4 employees	24%
British Columbia	14%	5-10 employees	33%
Nunavut	<1%	11-99 employees	33%
Northwest Territories	<1%	100-499 employees	5%
Type of Business		500 employees or more	<1%
Retailer	62%	Don't know	1%
Processor or Manufacturer	16%	Gross Annual Revenue	
Wholesaler or distributor	13%	\$30,000 or less per year	2%
Agriculture	8%	Between \$30,000 and less than \$100,000 per year	8%
Indigenous		Between \$100,000 and less than \$500,000 per year	16%
Yes	7%	Between \$500,000 and less than \$1 million per year	16%
No	86%	Between \$1 million and less than \$5 million per year	22%
Don't know/Not sure	7%	\$5 million or more per year	11%
		Don't know	17%
		Refused	9%

S1: Province/territory. S2: Which of the following categories best describes your business? S3: Which of the following activities apply to your business? S5: 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. S6: 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. S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE - REGION									
	Total (n=700)	Industry Sector				Company Size			
		Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler /Distributor (n=146)	Retailer (n=212)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Atlantic (NET)	7%	9%	7%	9%	7%	8%	7%	7%	10%
Newfoundland & Labrador	2%	1%	1%	1%	2%	3%	1%	1%	3%
Prince Edward Island	1%	2%	<1%	<1%	<1%	1%	<1%	1%	-
Nova Scotia	3%	2%	4%	6%	2%	2%	3%	3%	5%
New Brunswick	2%	4%	1%	2%	2%	3%	2%	2%	2%
Quebec	23%	23%	28%	15%	24%	23%	31%	21%	10%
Ontario	36%	42%	38%	51%	31%	36%	31%	35%	54%
West (NET)	34%	26%	27%	26%	38%	33%	31%	38%	26%
Manitoba	4%	6%	3%	2%	4%	2%	3%	6%	1%
Saskatchewan	4%	1%	3%	1%	5%	5%	5%	3%	3%
Alberta	12%	9%	7%	6%	15%	16%	13%	10%	6%
British Columbia	14%	10%	14%	17%	14%	10%	10%	20%	16%
Nunavut	<1%	-	-	-	<1%	<1%	-	-	-
Northwest Territories	-	-	-	-	-	-	-	-	-

S1: Province/territory. Base: All Respondents, n=700.

WAVE 1 BUSINESS PROFILE - REGION									
	Total (n=670)	Industry Sector				Company Size			
		Agriculture (n=52)	Processor/ Manufacturing (n=190)	Wholesaler /Distributor (n=98)	Retailer (n=330)	Micro (n=225)	Small (n=225)	Medium (n=225)	Large (n=225)
Atlantic (NET)	7%	2%	9%	5%	8%	4%	7%	9%	15%
Newfoundland & Labrador	2%	1%	1%	2%	2%	2%	1%	1%	2%
Prince Edward Island	1%	1%	1%	0%	0%	0%	0%	1%	1%
Nova Scotia	3%	-	5%	2%	3%	1%	3%	4%	6%
New Brunswick	2%	-	3%	1%	3%	1%	2%	3%	7%
Quebec	23%	12%	19%	20%	26%	30%	26%	16%	15%
Ontario	36%	48%	36%	48%	32%	36%	37%	35%	35%
West (NET)	34%	38%	36%	27%	34%	30%	30%	40%	35%
Manitoba	4%	5%	7%	3%	3%	3%	4%	4%	2%
Saskatchewan	4%	4%	4%	1%	4%	4%	4%	3%	4%
Alberta	12%	16%	12%	9%	12%	12%	11%	12%	14%
British Columbia	14%	12%	13%	14%	15%	12%	11%	19%	15%
Nunavut	<1%	-	0%	-	-	-	<1%	<1%	-
Northwest Territories	<1%	-	-	-	<1%	-	-	<1%	-

S1: Province/territory. Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – INDUSTRY SECTOR									
	Total (n=700)	Region				Company Size			
		Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Retailer	61%	56%	63%	53%	70%	72%	73%	52%	27%
Processor or Manufacturer	17%	16%	21%	18%	14%	10%	8%	24%	41%
Wholesale or distributor	14%	17%	9%	20%	11%	12%	14%	14%	19%
Agriculture	8%	10%	8%	9%	6%	6%	6%	9%	13%

S2: Which of the following categories best describes your business? Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – INDUSTRY SECTOR									
		Region				Company Size			
	Total (n=670)	Atlantic (n=72)	Quebec (n=144)	Ontario (n=173)	West (n=281)	Micro (n=166)	Small (n=201)	Medium (n=255)	Large (n=45)
Retailer	62%	68%	71%	55%	63%	75%	74%	45%	33%
Processor or Manufacturer	16%	21%	13%	16%	18%	7%	10%	27%	39%
Wholesale or distributor	13%	9%	11%	18%	11%	7%	13%	19%	13%
Agriculture	8%	2%	4%	11%	9%	11%	3%	9%	15%

S2: Which of the following categories best describes your business? Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – COMPANY SIZE									
		Industry Sector				Region			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
1 (Self-employed)	7%	3%	3%	4%	8%		7%	7%	7%
2-4 employees	21%	19%	13%	20%	24%	30%	20%	21%	21%
5-10 employees	28%	20%	13%	27%	33%	27%	37%	24%	25%
11-99 employees	36%	44%	51%	38%	31%	33%	33%	36%	41%
100-499 employees	6%	9%	16%	9%	2%	7%	2%	10%	5%
500 employees or more	2%	4%	3%	2%	1%	4%	2%	2%	1%
Don't know	<1%	1%	1%	-	-	-	<1%	<1%	<1%

S5: Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – COMPANY SIZE									
		Industry Sector				Region			
	Total (n=670)	Agriculture (n=52)	Processor/ Manufacturing (n=190)	Wholesaler /Distributor (n=98)	Retailer (n=330)	Atlantic (n=72)	Quebec (n=144)	Ontario (n=173)	West (n=281)
1 (Self-employed)	4%	13%	2%	4%	3%	3%	2%	5%	4%
2-4 employees	24%	26%	10%	12%	30%	13%	34%	23%	21%
5-10 employees	33%	12%	21%	33%	39%	32%	37%	34%	29%
11-99 employees	33%	39%	54%	47%	24%	40%	23%	33%	39%
100-499 employees	5%	10%	12%	5%	2%	10%	3%	5%	5%
500 employees or more	<1%	-	1%	-	1%	1%	1%	-	<1%
Don't know	1%	-	-	-	1%	-	-	1%	1%

S5: Which of the following best represents the number of people including yourself your company employs in Canada? If you are a franchisee, please only consider your location. Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – COMPANY SIZE									
	Total (n=700)	Industry Sector				Region			
		Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
\$30,000 or less per year	2%	-	1%	0%	3%	3%	7%	1%	-
Between \$30,000 and less than \$100,000 per year	11%	9%	4%	4%	15%	16%	5%	14%	10%
Between \$100,000 and less than \$500,000 per year	17%	17%	15%	6%	19%	16%	17%	13%	20%
Between \$500,000 and less than \$1 million per year	14%	16%	9%	9%	16%	11%	20%	13%	11%
Between \$1 million and less than \$5 million per year	21%	26%	24%	25%	18%	17%	20%	18%	25%
\$5 million or more per year	11%	19%	17%	28%	5%	11%	9%	12%	12%
Don't know	19%	9%	27%	19%	19%	24%	17%	21%	18%
Refused	5%	4%	4%	9%	4%	2%	5%	7%	4%

S6: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – BUSINESS SIZE BY REVENUE									
	Total (n=670)	Industry Sector				Region			
		Agriculture (n=52)	Processor/ Manufacturing (n=190)	Wholesaler/ /Distributor (n=98)	Retailer (n=330)	Atlantic (n=72)	Quebec (n=144)	Ontario (n=173)	West (n=281)
\$30,000 or less per year	2%	2%	2%	1%	2%	2%	3%	2%	3%
Between \$30,000 and less than \$100,000 per year	8%	8%	4%	1%	10%	5%	9%	8%	8%
Between \$100,000 and less than \$500,000 per year	16%	20%	13%	11%	17%	9%	12%	20%	15%
Between \$500,000 and less than \$1 million per year	16%	22%	12%	9%	17%	14%	20%	13%	16%
Between \$1 million and less than \$5 million per year	22%	24%	26%	27%	19%	19%	22%	19%	25%
\$5 million or more per year	11%	10%	24%	28%	4%	15%	6%	11%	13%
Don't know	17%	6%	14%	16%	19%	25%	14%	19%	15%
Refused	9%	8%	6%	6%	11%	10%	14%	9%	6%

S6: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – BUSINESS SIZE BY REVENUE					
	Company Size				
	Total (n=700)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
\$30,000 or less per year	2%	8%	-	-	-
Between \$30,000 and less than \$100,000 per year	11%	24%	15%	1%	-
Between \$100,000 and less than \$500,000 per year	17%	27%	22%	7%	5%
Between \$500,000 and less than \$1 million per year	14%	12%	18%	15%	1%
Between \$1 million and less than \$5 million per year	21%	11%	17%	32%	18%
\$5 million or more per year	11%	2%	5%	17%	39%
Don't know	19%	10%	17%	25%	32%
Refused	5%	6%	6%	4%	5%

S6: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – BUSINESS SIZE BY REVENUE					
	Company Size				
	Total (n=670)	Micro (n=166)	Small (n=201)	Medium (n=255)	Large (n=45)
\$30,000 or less per year	2%	7%	1%	-	-
Between \$30,000 and less than \$100,000 per year	8%	17%	6%	3%	-
Between \$100,000 and less than \$500,000 per year	16%	26%	17%	9%	-
Between \$500,000 and less than \$1 million per year	16%	18%	19%	11%	12%
Between \$1 million and less than \$5 million per year	22%	6%	23%	36%	8%
\$5 million or more per year	11%	1%	4%	23%	29%
Don't know	17%	17%	18%	11%	38%
Refused	9%	9%	12%	6%	14%

S6: And which of the following reflects the approximate size of your business by gross annual revenue for your Canadian operations? Again, if you are a franchisee, please only consider your location. Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – BUSINESS ACTIVITIES									
	Total (n=700)	Industry Sector				Region			
		Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
Sell food products at retail directly to consumers	76%	43%	52%	34%	96%	82%	80%	68%	81%
Import food products	25%	15%	33%	56%	17%	23%	15%	33%	23%
Send or convey food products across provincial or territorial boundaries (wholesaler/distributors)	25%	39%	51%	58%	8%	33%	14%	32%	23%
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial boundaries	25%	33%	71%	32%	9%	25%	25%	27%	22%

WAVE 2 - BUSINESS PROFILE – BUSINESS ACTIVITIES									
		Industry Sector				Region			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
Grade, label or package food for export or to be sent across provincial or territorial boundaries	19%	42%	58%	23%	5%	27%	15%	22%	18%
Export food products or prepare food for export	14%	33%	44%	16%	3%	27%	11%	16%	11%
Produce organic food [includes: organic meats, dairy, etc.]	11%	18%	23%	8%	8%	9%	16%	12%	9%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries	6%	49%	6%	1%	1%	7%	4%	7%	4%

S3: Which of the following activities apply to your business? Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – BUSINESS ACTIVITIES									
		Industry Sector				Region			
	Total (n=670)	Agriculture (n=52)	Processor/ Manufacturing (n=190)	Wholesaler /Distributor (n=98)	Retailer (n=330)	Atlantic (n=72)	Quebec (n=144)	Ontario (n=173)	West (n=281)
Sell food products at retail directly to consumers	78%	34%	48%	39%	99%	74%	84%	75%	78%
Import food products	23%	10%	36%	56%	14%	19%	15%	26%	25%
Send or convey food products across provincial or territorial borders (wholesaler/distributors)	21%	36%	50%	64%	2%	26%	12%	23%	23%
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	16%	37%	62%	14%	2%	22%	13%	17%	15%
Export food products or prepare food for export	16%	33%	48%	28%	2%	26%	8%	18%	16%
Grade, label or package food for export or to be sent across provincial or territorial borders	14%	24%	54%	22%	1%	24%	8%	14%	16%
Produce organic food [includes: organic meats, dairy, etc.]	8%	28%	17%	10%	3%	5%	5%	9%	10%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	4%	34%	6%	2%	-	3%	4%	5%	3%

S3: Which of the following activities apply to your business? Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – BUSINESS ACTIVITIES					
		Company Size			
	Total (n=700)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Sell food products at retail directly to consumers	76%	81%	81%	76%	45%
Import food products	25%	17%	20%	27%	59%
Send or convey food products across provincial or territorial boundaries (wholesaler/distributors)	25%	15%	19%	30%	57%
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial boundaries	25%	12%	21%	31%	48%
Grade, label or package food for export or to be sent across provincial or territorial boundaries	19%	9%	12%	25%	57%
Export food products or prepare food for export	14%	5%	10%	16%	51%
Produce organic food [includes: organic meats, dairy, etc.]	11%	12%	8%	12%	19%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries	6%	2%	2%	7%	21%

S3: Which of the following activities apply to your business? Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – BUSINESS ACTIVITIES					
		Company Size			
	Total (n=670)	Micro (n=166)	Small (n=201)	Medium (n=255)	Large (n=45)
Sell food products at retail directly to consumers	78%	86%	85%	67%	54%
Import food products	23%	15%	18%	30%	38%
Send or convey food products across provincial or territorial borders (wholesaler/distributors)	21%	11%	13%	33%	42%
Prepare, process, treat, manufacture or preserve food for export or to be sent across provincial or territorial borders	16%	6%	8%	28%	39%
Export food products or prepare food for export	16%	6%	12%	22%	48%
Grade, label or package food for export or to be sent across provincial or territorial borders	14%	4%	7%	25%	43%
Produce organic food [includes: organic meats, dairy, etc.]	8%	5%	4%	14%	13%
Grow fruit, vegetables or grains for export or to be sent across provincial or territorial borders	4%	3%	1%	6%	12%

S3: Which of the following activities apply to your business? Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – INDIGENOUS OPERATED									
		Industry Sector				Region			
	Total (n=700)	Agriculture (n=115)	Processor/ Manufacturer (n=227)	Wholesaler/ Distributor (n=146)	Retailer (n=212)	Atlantic (n=66)	Quebec (n=221)	Ontario (n=171)	West (n=242)
Yes	6%	2%	5%	3%	7%	9%	2%	6%	8%
No	92%	97%	93%	93%	92%	90%	97%	92%	91%
Don't know / Not Sure	2%	1%	2%	3%	1%	1%	1%	2%	2%

S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – INDIGENOUS OPERATED									
		Industry Sector				Region			
	Total (n=670)	Agriculture (n=52)	Processor/ Manufacturing (n=190)	Wholesaler /Distributor (n=98)	Retailer (n=330)	Atlantic (n=72)	Quebec (n=144)	Ontario (n=173)	West (n=281)
Yes	7%	7%	4%	12%	7%	6%	3%	11%	6%
No	86%	90%	92%	83%	85%	87%	91%	82%	88%
Don't know / Not Sure	7%	3%	4%	6%	8%	7%	7%	7%	6%

S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=670.

WAVE 2 - BUSINESS PROFILE – INDIGENOUS OPERATED					
		Company Size			
	Total (n=700)	Micro (n=168)	Small (n=168)	Medium (n=290)	Large (n=71)
Yes	6%	7%	7%	4%	8%
No	92%	93%	92%	93%	89%
Don't know / Not Sure	2%	1%	0%	3%	3%

S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=700.

WAVE 1 - BUSINESS PROFILE – INDIGENOUS OPERATED					
		Company Size			
	Total (n=670)	Micro (n=166)	Small (n=201)	Medium (n=255)	Large (n=45)
Yes	7%	9%	7%	6%	5%
No	86%	82%	84%	91%	93%
Don't know / Not Sure	7%	9%	9%	4%	1%

S7: Would you classify your company as Indigenous owned or operated? Base: All Respondents, n=670.

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 survey consisted of two national telephone surveys with businesses in the food industry in Canada based on a selected list of North American Industry Classification System (NAICS) codes provided by CFIA. The sample frames were selected from a list of businesses from InfoCanada, a common and reputable list provider in the industry.

TARGETED INDUSTRIES WITH NAICS CODES			
AGRICULTURE, FORESTRY, FISHING AND HUNTING (11)			
1121101	Potato Farming	11231001	Chicken Egg Production
1121901	Other Vegetable (Except Potato) & Melon Farming	11233001	Turkey Production
1133101	Apple Orchards	11251901	Other Aquaculture
1133103	Apple Orchards	11251903	Other Aquaculture
1133104	Apple Orchards	11251904	Other Aquaculture
1133402	Berry (Except Strawberry) Farming	11292001	Horse & Other Equine Production
1133902	Other Noncitrus Fruit Farming	11293002	Fur-Bearing Animal & Rabbit Production
1141101	Mushroom Production	11293004	Fur-Bearing Animal & Rabbit Production
1141902	Other Food Crops Grown Under Cover	11299001	All Other Animal Production
11199801	All Other Miscellaneous Crop Farming	11299002	All Other Animal Production
11199803	All Other Miscellaneous Crop Farming	11299003	All Other Animal Production
11199804	All Other Miscellaneous Crop Farming	11299007	All Other Animal Production
11199806	All Other Miscellaneous Crop Farming	11299013	All Other Animal Production
11199807	All Other Miscellaneous Crop Farming	11299017	All Other Animal Production
11199808	All Other Miscellaneous Crop Farming	11421001	Hunting & Trapping
11199809	All Other Miscellaneous Crop Farming	11421004	Hunting & Trapping
11199810	All Other Miscellaneous Crop Farming	11421005	Hunting & Trapping
11199811	All Other Miscellaneous Crop Farming	11421006	Hunting & Trapping
11212001	Dairy Cattle & Milk Production	11421009	Hunting & Trapping
11212002	Dairy Cattle & Milk Production		
MANUFACTURING (31)			
31121102	Flour Milling	31161501	Poultry Processing
31121106	Flour Milling	31171001	Seafood Product Preparation & Packaging
31121107	Flour Milling	31171003	Seafood Product Preparation & Packaging
31121301	Malt Manufacturing	31171004	Seafood Product Preparation & Packaging
31122402	Soybean & Other Oilseed Processing	31171007	Seafood Product Preparation & Packaging
31122501	Fats & Oils Refining & Blending	31171008	Seafood Product Preparation & Packaging
31122505	Fats & Oils Refining & Blending	31181101	Retail Bakeries
31122508	Fats & Oils Refining & Blending	31181102	Retail Bakeries
31122511	Fats & Oils Refining & Blending	31181103	Retail Bakeries
31122512	Fats & Oils Refining & Blending	31181104	Retail Bakeries
31122516	Fats & Oils Refining & Blending	31181105	Retail Bakeries
31123001	Breakfast Cereal Manufacturing	31181202	Commercial Bakeries
31131401	Cane Sugar Manufacturing	31182101	Cookie & Cracker Manufacturing
31131403	Cane Sugar Manufacturing	31182403	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour
31135101	Chocolate/Confectionery Mfg From Cacao Beans	31182404	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour
31135201	Confectionery Mfg From Purchased Chocolate	31191102	Roasted Nuts & Peanut Butter Manufacturing
31141102	Frozen Fruit Juice & Vegetable Manufacturing	31191901	Other Snack Food Manufacturing
31141202	Frozen Specialty Food Manufacturing	31191905	Other Snack Food Manufacturing
31141203	Frozen Specialty Food Manufacturing	31191906	Other Snack Food Manufacturing
31141204	Frozen Specialty Food Manufacturing	31192001	Coffee & Tea Manufacturing
31142101	Fruit & Vegetable Canning	31192002	Coffee & Tea Manufacturing
31142103	Fruit & Vegetable Canning	31194101	Mayonnaise Dressing & Other Prepared Sauce Mfg
31142104	Fruit & Vegetable Canning	31194103	Mayonnaise Dressing & Other Prepared Sauce Mfg
31142106	Fruit & Vegetable Canning	31194202	Spice & Extract Manufacturing
31142107	Fruit & Vegetable Canning	31194203	Spice & Extract Manufacturing
31142303	Dried & Dehydrated Food Manufacturing	31199901	All Other Miscellaneous Food Manufacturing
31151201	Creamery Butter Manufacturing	31199902	All Other Miscellaneous Food Manufacturing
31151301	Cheese Manufacturing	31199905	All Other Miscellaneous Food Manufacturing
31151402	Dry Condensed & Evaporated Dairy Products Mfg	31199906	All Other Miscellaneous Food Manufacturing
31152001	Ice Cream & Frozen Dessert Manufacturing	31199908	All Other Miscellaneous Food Manufacturing
31161101	Animal (Except Poultry) Slaughtering	31199910	All Other Miscellaneous Food Manufacturing
31161102	Animal (Except Poultry) Slaughtering	31199913	All Other Miscellaneous Food Manufacturing
31161103	Animal (Except Poultry) Slaughtering	31199917	All Other Miscellaneous Food Manufacturing
31161104	Animal (Except Poultry) Slaughtering	31199919	All Other Miscellaneous Food Manufacturing
31161202	Meat Processed From Carcasses	31199920	All Other Miscellaneous Food Manufacturing
31161205	Meat Processed From Carcasses	31211101	Soft Drink Manufacturing
31161207	Meat Processed From Carcasses	31211102	Soft Drink Manufacturing
31161301	Rendering & Meat Byproduct Processing	31211103	Soft Drink Manufacturing
31161302	Rendering & Meat Byproduct Processing		

WHOLESALE TRADE (42)			
42441003	General Line Grocery Merchant Wholesalers	42449010	Other Grocery & Related Products Merchant Whlsrs
42441004	General Line Grocery Merchant Wholesalers	42449011	Other Grocery & Related Products Merchant Whlsrs
42441005	General Line Grocery Merchant Wholesalers	42449013	Other Grocery & Related Products Merchant Whlsrs
42442001	Packaged Frozen Food Merchant Wholesalers	42449015	Other Grocery & Related Products Merchant Whlsrs
42442002	Packaged Frozen Food Merchant Wholesalers	42449017	Other Grocery & Related Products Merchant Whlsrs
42442003	Packaged Frozen Food Merchant Wholesalers	42449018	Other Grocery & Related Products Merchant Whlsrs
42442004	Packaged Frozen Food Merchant Wholesalers	42449019	Other Grocery & Related Products Merchant Whlsrs
42442005	Packaged Frozen Food Merchant Wholesalers	42449022	Other Grocery & Related Products Merchant Whlsrs
42442006	Packaged Frozen Food Merchant Wholesalers	42449024	Other Grocery & Related Products Merchant Whlsrs
42442007	Packaged Frozen Food Merchant Wholesalers	42449026	Other Grocery & Related Products Merchant Whlsrs
42443009	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449027	Other Grocery & Related Products Merchant Whlsrs
42443010	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449030	Other Grocery & Related Products Merchant Whlsrs
42443012	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449032	Other Grocery & Related Products Merchant Whlsrs
42443013	Dairy Product (Exc Dried Or Canned) Mrchnt Whlsrs	42449033	Other Grocery & Related Products Merchant Whlsrs
42444001	Poultry & Poultry Product Merchant Wholesalers	42449034	Other Grocery & Related Products Merchant Whlsrs
42444002	Poultry & Poultry Product Merchant Wholesalers	42449035	Other Grocery & Related Products Merchant Whlsrs
42444003	Poultry & Poultry Product Merchant Wholesalers	42449037	Other Grocery & Related Products Merchant Whlsrs
42445002	Confectionery Merchant Wholesalers	42449042	Other Grocery & Related Products Merchant Whlsrs
42445004	Confectionery Merchant Wholesalers	42449044	Other Grocery & Related Products Merchant Whlsrs
42445008	Confectionery Merchant Wholesalers	42449046	Other Grocery & Related Products Merchant Whlsrs
42445010	Confectionery Merchant Wholesalers	42449047	Other Grocery & Related Products Merchant Whlsrs
42446001	Fish & Seafood Merchant Wholesalers	42449050	Other Grocery & Related Products Merchant Whlsrs
42446002	Fish & Seafood Merchant Wholesalers	42449055	Other Grocery & Related Products Merchant Whlsrs
42447002	Meat & Meat Product Merchant Wholesalers	42449056	Other Grocery & Related Products Merchant Whlsrs
42447005	Meat & Meat Product Merchant Wholesalers	42449057	Other Grocery & Related Products Merchant Whlsrs
42447006	Meat & Meat Product Merchant Wholesalers	42449061	Other Grocery & Related Products Merchant Whlsrs
42448007	Fresh Fruit & Vegetable Merchant Wholesalers	42449064	Other Grocery & Related Products Merchant Whlsrs
42448008	Fresh Fruit & Vegetable Merchant Wholesalers	42451002	Grain & Field Bean Merchant Wholesalers
42448009	Fresh Fruit & Vegetable Merchant Wholesalers	42451005	Grain & Field Bean Merchant Wholesalers
42448010	Fresh Fruit & Vegetable Merchant Wholesalers	42459003	Other Farm Product Raw Material Merchant Whlsrs
42448011	Fresh Fruit & Vegetable Merchant Wholesalers	42459005	Other Farm Product Raw Material Merchant Whlsrs
42449002	Other Grocery & Related Products Merchant Whlsrs	42459007	Other Farm Product Raw Material Merchant Whlsrs
42449003	Other Grocery & Related Products Merchant Whlsrs	42459008	Other Farm Product Raw Material Merchant Whlsrs
42449005	Other Grocery & Related Products Merchant Whlsrs	42459010	Other Farm Product Raw Material Merchant Whlsrs
42449006	Other Grocery & Related Products Merchant Whlsrs	42459017	Other Farm Product Raw Material Merchant Whlsrs
RETAIL TRADE (44)			
44511001	Supermarkets/Other Grocery (Exc Convenience) Strs	44529902	All Other Specialty Food Stores
44511002	Supermarkets/Other Grocery (Exc Convenience) Strs	44529903	All Other Specialty Food Stores
44511003	Supermarkets/Other Grocery (Exc Convenience) Strs	44529905	All Other Specialty Food Stores
44511005	Supermarkets/Other Grocery (Exc Convenience) Strs	44529906	All Other Specialty Food Stores
44511006	Supermarkets/Other Grocery (Exc Convenience) Strs	44529907	All Other Specialty Food Stores
44511007	Supermarkets/Other Grocery (Exc Convenience) Strs	44529909	All Other Specialty Food Stores
44511008	Supermarkets/Other Grocery (Exc Convenience) Strs	44529910	All Other Specialty Food Stores
44512001	Convenience Stores	44529911	All Other Specialty Food Stores
44521001	Meat Markets	44529912	All Other Specialty Food Stores
44521003	Meat Markets	44529914	All Other Specialty Food Stores
44521004	Meat Markets	44529915	All Other Specialty Food Stores
44521006	Meat Markets	44529917	All Other Specialty Food Stores
44521009	Meat Markets	44529918	All Other Specialty Food Stores
44521010	Meat Markets	44529920	All Other Specialty Food Stores
44521012	Meat Markets	44529921	All Other Specialty Food Stores
44522003	Fish & Seafood Markets	44529923	All Other Specialty Food Stores
44522004	Fish & Seafood Markets	44529924	All Other Specialty Food Stores
44523001	Fruit & Vegetable Markets	44529927	All Other Specialty Food Stores
44523003	Fruit & Vegetable Markets	44529929	All Other Specialty Food Stores
44523005	Fruit & Vegetable Markets	44529930	All Other Specialty Food Stores
44523006	Fruit & Vegetable Markets	44529932	All Other Specialty Food Stores
44529202	Confectionery & Nut Stores	44529934	All Other Specialty Food Stores
44529204	Confectionery & Nut Stores	44529936	All Other Specialty Food Stores
44529205	Confectionery & Nut Stores	44529938	All Other Specialty Food Stores
44529206	Confectionery & Nut Stores		

- Quorus designed the survey instruments in English in conjunction with the CFIA Project Authority. Together, Quorus and CFIA ensured the research objectives were addressed, that plain language was used, and that the questionnaires flowed easily for respondents. Quorus collaborated with

CFIA to then finalize the survey instruments for each wave. Quorus translated the client-approved English versions of the survey. Respondents had the choice to complete the interview in English or French.

- Quorus informed respondents of their rights under the *Privacy and Access to Information Acts* and ensured that 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 at the end of the interview; informing participants that the study will be made available to the public in 6 months after field completion through Library and Archives Canada, informing participants that their participation in the study was voluntary, and that the information provided would be administered according to the requirements of the *Privacy Act*.
- The approved final questionnaires were programmed for computer-based telephone data collection.
- For Wave 2, a total of 700 businesses participated in the survey, from which 200 were “Retail Only”. As for Wave 1, 670 businesses participated in the survey, from which 300 were “Retail Only”. Most of the results in this report are based on businesses that are not exclusively retailers (Wave 2, n=500; Wave 1, n=370), as the key target audience are food businesses that import or prepare food for export or to be sent across provincial or territorial boundaries. These are businesses in the food industry that may or may not have a retail function.
- Data collection for Wave 2 occurred between February 4th, 2019 and March 1, 2019. Wave 1 data collection occurred between October 24 and November 9, 2018.
- In Wave 2, “Retail Only” participants completed a 14-minute questionnaire, while all other businesses completed an 18-minute questionnaire. For Wave 1, “Retail Only” participants completed a 5-minute questionnaire, while all other businesses completed an 18 to 20-minute interview.
- The survey was conducted following the *Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys*.
- For this study, a quota for “Retail Only” businesses was established to minimize the dominance of this segment in the overall sample. Data was monitored also to ensure that multiple locations from the same franchises were overrepresented in the sample.
- The margin of error of this sample size is +/- 3.8%, 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%.

- The data was weighted according to the population counts per industry vertical and province as per InfoCanada information.
- This study saw a response rate of 14% across the entire sample in Wave 1 and of 17% in Wave 2.

WAVE 2 - DIALING DISPOSITION REPORT

Total Numbers Attempted	6872
Out-of-scope - Invalid	647
Unresolved (U)	1955
<i>No answer/Answering machine</i>	1955
In-scope - Non-responding (IS)	1248
<i>Language barrier</i>	92
<i>Incapable of completing (ill/deceased)</i>	167
<i>Callback (Respondent not available)</i>	1382
Total Asked	2096
<i>Refusal</i>	958
<i>Termination</i>	56
In-scope - Responding units (R)	926
<i>Completed Interview</i>	700
<i>NQ - Quota Full</i>	272
<i>NQ - (INT32) BUSINESS IS NOT RELATED TO FOOD BUSINESS</i>	27
Refusal Rate	48.38
Response Rate	17.47
Incidence	75.59

WAVE 1 - DIALING DISPOSITION REPORT

Total Numbers Attempted	7314
Out-of-scope - Invalid	594
Unresolved (U)	3376
<i>No answer/Answering machine</i>	3376
In-scope - Non-responding (IS)	1248
<i>Language barrier</i>	81
<i>Incapable of completing (ill/deceased)</i>	99
<i>Callback (Respondent not available)</i>	1068
Total Asked	2096
<i>Refusal</i>	1127
<i>Termination</i>	43
In-scope - Responding units (R)	926
<i>Completed Interview</i>	670
<i>NQ - Quota Full</i>	191
<i>NQ - (INT32) BUSINESS IS NOT RELATED TO FOOD BUSINESS</i>	65
Refusal Rate	55.82
Response Rate	13.78
Incidence	72.35

Appendices

Wave 2 - Questionnaires 2019 Survey Questionnaire - English

[Programing instructions are in blue font and in square brackets]

[Interviewer instructions are in black font and square brackets and not read]

Introduction

Hello/Bonjour *[pause... In Quebec Bonjour/Hello]*, the Government of Canada is conducting a research survey with businesses in Canada. I am hoping to speak with the person in your company 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, 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 Quorus Consulting, the company hired to do the survey.

The survey will take approximately 12 minutes to complete. Please note that your participation is voluntary, confidential and anonymous and we can call back at a better time if you prefer.

To begin, I would like to confirm some information about your business...

- S1. **[RECORD from sample - not asked]** Province/territory
- S1A. **[RECORD from sample - not asked]**
Full 8-digit North American Industry Classification System (NAICS) code
- S2. Which of the following categories best describes your business? **[READ LIST]**
- | | |
|-------------------------------|----|
| 11) Agriculture | 1 |
| 31) Processor or Manufacturer | 2 |
| 42) Wholesaler or distributor | 3 |
| 44) Retailer | 4 |
| Other (please specify)_____ | 77 |
- S3. Which of the following activities apply to your business **[READ LIST - SELECT ALL THAT APPLY]**?
- | | |
|--|---|
| Import food products | 1 |
| Export food products or prepare, process, treat, manufacture or preserve food for export | 2 |
| Prepare, process, treat, manufacture or preserve food to be sent across provincial or territorial boundaries | 3 |
| Grade, label or package food for export or to be sent across provincial or territorial boundaries | 4 |
| Grow fruit, vegetables or grains for export or to be sent across provincial or territorial boundaries | 5 |
| Send or convey food products across provincial or territorial boundaries (wholesaler/ distributors) | 6 |
| Sell food products at retail directly to consumers | 7 |
| Produce organic food [interviewer note: includes organic meats, dairy, etc.] | 8 |
| None of the above | 9 |
- S3A. **[IF NONE OF THE ABOVE IN S3: Ask]** What would you say is your company's main business activity?
-

[IF BUSINESS IS RELATED TO FOOD BUSINESS RECODE S3 AND CONTINUE, OTHERWISE THANK AND TERMINATE]

S3B1. **[ASK S3B1 IF S3=1]** Which regions do you currently import from **[READ LIST - SELECT ALL THAT APPLY]**?

United States	1
Central America / Caribbean	2
South America	3
Africa	4
Western Europe	5
Eastern Europe	6
Middle East	7
Asia (Pacific)	8
China	9
India	10
Australia	11

S3B2. **[ASK S3B2 IF S3=2]** Which regions do you currently export from **[READ LIST - SELECT ALL THAT APPLY]**?

United States	1
Central America / Caribbean	2
South America	3
Africa	4
Western Europe	5
Eastern Europe	6
Middle East	7
Asia (Pacific)	8
China	9
India	10
Australia	11

[FLAG AS "RETAIL ONLY" IF ONLY SELECTED "G" AT S3]

S5. 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. **[READ LIST] [Just total number of employees is acceptable including part-time and casual]**

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 [DO NOT READ]	8
Refused [DO NOT READ]	9

S6. 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
Refused [DO NOT READ]	9

S7. Would you classify your company as Indigenous owned or operated?

Yes	1
No	2
Don't know / Not Sure [DO NOT READ, PROMPT IF NECESSARY]	9

Food Safety Activities

A1. If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident.

- 1 – Not at all confident
- 2
- 3
- 4
- 5
- 6
- 7 – Very confident
- 9 – Don't know **[DO NOT READ]**

A2. **[IF PROVIDED A SCORE FROM 1 TO 7]** Please expand on why you provided that answer.

Don't know / Refused 99

A3. Which of the following activities, if any, applies at your company: **[READ LIST - SELECT ALL THAT APPLY] - [RANDOMIZE]**?

- [SKIP IF RETAIL-ONLY]** Has written/documented standard operating procedures on food safety. 1
- [SKIP IF RETAIL-ONLY]** Has preventive controls in place, but not written or documented in a plan 2
- [SKIP IF RETAIL-ONLY]** Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program **[IF ASKED: HACCP stands for Hazard Analysis and Critical Control Points and QMP = Quality Management Program]** 3
- Has a traceability program established **[IF NEEDED: written records that trace all food one step back and one step forward, as applicable]** 4
- [SKIP IF RETAIL-ONLY]** Uses a 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]** 5
- [SKIP IF RETAIL-ONLY]** Has a food licence or registration with CFIA 6
- Regularly sends staff on food safety training 7
- Has an internal training program on food safety 8
- None of the above 9

Awareness of CFIA and the Safe Food for Canadians Regulations

B1. On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA?

- 1 – Not at all familiar
- 2
- 3
- 4
- 5
- 6
- 7 – Very familiar
- 9 – Don't know **[DO NOT READ]**

B1a. Over the past three to four weeks, have you seen, read or heard any advertising from the Canadian Food Inspection Agency?

- Yes 1
- No 2 - **SKIP TO B2**

B1b. Thinking specifically about the ad or ads that come to mind, what do you remember about the ads? **[DO NOT READ]**

- Safe Food for Canadians Regulations (SFCR) specific mention 1
- Safe food or new regulations /rules general mention 2
- Other CFIA program 3
- Other (Record) _____ 7

B2. **[ASK IF NOT MENTIONED AT B1b]** Have you heard, seen or read anything about the *Safe Food for Canadians* Regulations, which introduces new requirements for food safety and came into force January 15, 2019?

- Yes 1
- No 2
- Don't know / Not Sure **[DO NOT READ, PROMPT IF NECESSARY]** 9

B2a. **[IF B1b=1 OR B2=YES]** Where did you hear, see or read about the regulations?

Don't know / Refused 99

B3. On a scale from 1 to 7, where 1 means "not at all clearly" and 7 means "very clearly", how well do you feel that you understand the food safety regulations that apply to your business?

- 1 – Not at all clearly
- 2
- 3

4

5

6

7 – Very clearly

9 – Don't know **[DO NOT READ]**

B7. **[SKIP IF RETAIL-ONLY]** From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be...

[Randomize 1-3] [Read 1-3]

Licencing	1
Written preventive controls	2
Traceability of food products	3
Other – Please	77
specify: _____	

Contact with CFIA

I'm now going to ask you about any contact you have had with the CFIA in the last year.

C1a. I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. **[SELECT ALL THAT APPLY, REMIND RESPONDENT OF TIME FRAME AS NECESSARY]**

Looked for information about food safety regulations or requirements on the CFIA's website	1
Contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, not including permissions, licences, registrations or certifications.	2
Contacted the CFIA for information [not requesting] on a permission, licence or certificate	3
Requested a permission, licence, registration, or certificate from the CFIA	4
Have been inspected by the CFIA within the past 12 months	5
Initiated a product recall either voluntary or ordered	6
Searched for operational guidance using the Guidance Finder	7
I have not looked for information from or had any personal contact with the CFIA over the last 12 months	8
Don't know/ Refused [DO NOT READ]	9

[ASK C1 IF ANY INTERACTION WITH CFIA AT C1A (1-4)]

C1. You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it... **[READ LIST - SELECT ALL THAT APPLY]**

In person at a CFIA office	1
Over the phone	2
On the CFIA website	3
Email	4
Social media	5
Webinar	6
Other (please specify)_____	77

C1b. **[ASK IF WEBSITE USED AT C1]** To what extent was the information the CFIA's website useful in helping you find the information you were looking for? Use a scale of 1 to 7, where 1 means "not at all helpful" and 7 means "very helpful".

- 1 – Not at all helpful
- 2

- 3
- 4
- 5
- 6
- 7 – Very helpful
- 9 – Don't know **[DO NOT READ]**

C1c. **[ASK IF WEBSITE USED AT C1]** How could the CFIA improve their website?

C1d. **[ASK IF EMAIL USED AT C1]** To what extent was the information provided by email useful in helping you find the information you were looking for? Use a scale of 1 to 7, where 1 means “not at all helpful” and 7 means “very helpful”.

- 1 – Not at all helpful
- 2
- 3
- 4
- 5
- 6
- 7 – Very helpful
- 9 – Don't know **[DO NOT READ]**

C1e. **[ASK IF PHONE USED AT C1]** To what extent was the information provided by phone useful in helping you find the information you were looking for? Use a scale of 1 to 7, where 1 means “not at all helpful” and 7 means “very helpful”.

- 1 – Not at all helpful
- 2
- 3
- 4
- 5
- 6
- 7 – Very helpful
- 9 – Don’t know **[DO NOT READ]**

C1f. **[ASK IF “IN PERSON” AT C1]** To what extent was the information obtained in person at a CFIA office useful in helping you find the information you were looking for? Use a scale of 1 to 7, where 1 means “not at all helpful” and 7 means “very helpful”.

- 1 – Not at all helpful
- 2
- 3
- 4
- 5
- 6
- 7 – Very helpful
- 9 – Don’t know **[DO NOT READ]**

C1g. How would you prefer to request and receive regulatory information from the CFIA? **[READ LIST - SELECT ALL THAT APPLY]**

- | | |
|---|----|
| Using a chatbot – an interactive chat with computer-activated responses on the CFIA website | 1 |
| A live customer service-based chat on the CFIA website | 2 |
| Over the phone | 3 |
| By Email | 4 |
| On Social media | 5 |
| Other (please specify) _____ | 77 |

C1h. How would you prefer to request and receive CFIA services, such as food licences or export certificates? **[READ LIST - SELECT ALL THAT APPLY]**

- On the CFIA website 1
- By Email 2
- On Social media 3
- By fax 4
- In person at a CFIA office 5
- Other (please specify): _____ 77

C2. On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? **[ROTATE STATEMENTS]**

	1 Do not agree at all	2	3	4	5	6	7 Strongly agree	Don't know [DO NOT READ]
a) The CFIA is fair when inspecting food businesses.								
b) It is easy to understand the information the CFIA provides food businesses.								
c) The CFIA provides enough information to meet your regulatory obligations.								
d) Information from the CFIA arrives in a timely manner.								

My CFIA

F1. Have you ever heard, seen or read anything about CFIA’s online portal called “My CFIA?”

- Yes, I used it **[PROMPT FOR USE IF YES]** 1
- Yes, but never used it 2
- No 3
- Don't know/Refused **[DO NOT READ]** 9

[IF F1= 'YES, I USED IT" ASK F1A TO F2A]

F1a. Have you ever used the portal for a... **[READ LIST - SELECT ALL THAT APPLY]**

New licence request	1
Licence renewal	2
Permit	3
Export certificate	4
Registration	5
Only enrolled	6
Other (please specify)_____	77

F2. Please rate your overall level of satisfaction with "My CFIA" on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied.

- 1 – Not at all satisfied
- 2
- 3
- 4
- 5
- 6
- 7 – Very satisfied
- 9 – Don't know **[DO NOT READ]**

F2a. Please expand on why you provide that rating?

Don't know / Refused 99

F3. **[IF F1= YES, DO NOT READ STATEMENT]:** My CFIA is a web portal that provides clients with secure access to a growing number of CFIA services online. It is a convenient and secure way to do business with the CFIA. My CFIA can be used to manage and track service requests online, including permissions such as licences, permits, registrations and export certificates. You can find it at inspection.gc.ca/mycfia (Francais: inspection.gc.ca/monacia)

How likely would you be to use "My CFIA" in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely?

- 1 – Not at all likely
- 2
- 3
- 4
- 5
- 6

- 7 – Very likely
- 9 – Don't know **[DO NOT READ]**

F4. **[IF PROVIDED A SCORE FROM 1 TO 7]** Please expand on why you provided that score

Don't know / Refused 99

Compliance Burden

G1. On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? **[IF NEEDED: "Burdensome" is defined as unnecessary and undue compliance burden – that is, the time and resources spent by business to demonstrate compliance with the federal government regulations.]**

- 1 – Not at all burdensome
- 2
- 3
- 4
- 5
- 6
- 7 – Very burdensome
- 9 – Don't know **[DO NOT READ]**

[SKIP IF RETAIL-ONLY] With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree".

G1A. Over the past 12 months, I've needed to spend less time searching for food safety information I require.

- 1 – Do not agree at all
- 2
- 3
- 4
- 5
- 6
- 7 – Strongly agree
- 8 - I do not search for food safety information **[DO NOT READ]**
- 9 – Don't know **[DO NOT READ]**

G1B. **[SKIP IF RETAIL-ONLY]** The CFIA takes the needs of businesses into account when developing new regulatory information products.

- 1 – Do not agree at all
- 2
- 3
- 4
- 5
- 6
- 7 – Strongly agree
- 9 – Don't know **[DO NOT READ]**

G2. Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied.

- 1 – Not at all satisfied
- 2
- 3
- 4
- 5
- 6
- 7 – Very satisfied
- 9 – Don't know **[DO NOT READ]**

G3. **[IF PROVIDED A SCORE FROM 1 TO 7]** Please expand on why you provided that score.

Don't know / Refused 99

G4. In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements? **[PROBE FOR HOW THEY GET INFORMATION, - THE TYPE OF INFORMATION IS ASKED NEXT AT G4A. – DO NOT READ, SELECT ONLY ONE]**

Website is not user-friendly / difficult to navigate	1
Lack of clear information / difficult to understand	2
Lack of notifications / updates	3
Too much information / high volume of information	4
Lack of contact with customer service / not responsive	5
Research / finding information is too time-consuming	6
Other (please specify): _____	7
None / No challenges	88
Don't know / Refused	99

G4a. What were some of the food safety topics you felt were difficult to get clear information on?

None in particular	98
Don't know / Refused	99

That concludes the interview. On behalf of the Canadian Food Inspection Agency thank you very much for your participation in this research. If you are interested in learning more about the CFIA and food safety please consult inspection.gc.ca/SafeFood. The CFIA Toolkit for Businesses has informative digital tools that can answer whether or not you need a licence and the required timelines, whether or not you need a written preventive control plan, and also outlines any traceability requirements that may apply to your business.

Wave 1 - Questionnaires 2018-19 Survey Questionnaire - English

[Programming instructions are in blue font and in square brackets]

[Interviewer instructions are in black font and square brackets and not read]

Introduction

Hello/Bonjour *[pause... In Quebec Bonjour/Hello]*, the Government of Canada is conducting a research survey with businesses in Canada. I am hoping to speak with the person in your company 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, 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 Quorus Consulting, the company hired to do the survey.

The survey will take approximately 12 minutes to complete. Please note that your participation is voluntary, confidential and anonymous and we can call back at a better time if you prefer.

To begin, I would like to confirm some information about your business...

S1. ***[RECORD from sample - not asked]*** Province/territory

S1A. ***[RECORD from sample - not asked]***

Full 8-digit North American Industry Classification System (NAICS) code

S2. Which of the following categories best describes your business? ***[READ LIST]***

11) Agriculture 1

31) Processor or Manufacturer 2

42) Wholesaler or distributor	3
44) Retailer	4
Other (please specify) _____	77

S3. Which of the following activities apply to your business **[READ LIST - SELECT ALL THAT APPLY]**?

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

S3A. **[IF NONE OF THE ABOVE IN S3: Ask]** What would you say is your company's main business activity?

[IF BUSINESS IS RELATED TO FOOD BUSINESS RECODE S3 AND CONTINUE, OTHERWISE THANK AND TERMINATE]

[FLAG AS "RETAIL ONLY" IF ONLY SELECTED "G" AT S3]

[ASK S4 AND S4A AND S4B FOR RETAIL ONLY COMPANY]

S4. Do you have a process in place that will allow you to trace back your food to the company that supplied it?

Yes	1
No	2
Not sure	3

S4A. Have you heard of the Safe Food for Canadians Regulations?

Yes	1
No	2
Not sure	3

S4B. Do you know that the Safe Food for Canadians Regulations that come into force January 15, 2019 require most food companies to be able to trace where their food products were purchased?

Yes	1
-----	---

No

2

S5. 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. **[READ LIST] [Just total number of employees is acceptable including part-time and casual]**

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 [DO NOT READ]	8
Refused [DO NOT READ]	9

S6. 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
Refused [DO NOT READ]	9

S7. Would you classify your company as Indigenous owned or operated?

Yes	1
No	2
Don't know / Not Sure [DO NOT READ, PROMPT IF NECESSARY]	9

[TERMINATE IF RETAIL ONLY QUOTA TARGET IS REACHED - TARGET QUOTA TBD AFTER FIRST ~200 INTERVIEWS ARE COMPLETED]

A1. Thinking about food safety in general, who do you think has the most responsibility to ensure the food sold in Canada is safe. Is it... **[READ LIST]**

[RANDOMIZE]

The Federal government	1
The food industry	2
The Provincial government	3
Canadian Farmers	4
Consumers	5
Or someone else? (please specify) [DON'T RANDOMIZE] _____	77
DK [DON'T RANDOMIZE]	99

A2. On a scale of 1 to 7, where 1 means not at all and 7 means very clearly, how well do you feel that you understand the food safety regulations that apply to your foods?

- 1 – Not at all
- 2
- 3
- 4
- 5
- 6
- 7 – Very clearly
- 9 – Don't know **[DO NOT READ]**

A3. Which of the following activities, if any, applies at your company: **[READ LIST - SELECT ALL THAT APPLY] - [RANDOMIZE]?**

Has written/documented standard operating procedures on food safety.	1
Has preventive controls in place, but not written or documented in a plan	2
Has preventive controls in place, which are outlined in a written plan such as a HACCP based plan, QMP or other program [IF ASKED: HACCP stands for Hazard Analysis and Critical Control Points and QMP = Quality Management Program]	3
Has a traceability program established [IF NEEDED: written records that trace all food one step back and one step forward, as applicable]	4
Uses a 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]	5
Follows six sigma quality control	6
Regularly sends staff on food safety training	7
Has an internal training program on food safety	8

None of the above

9

Awareness of CFIA and the Safe Food for Canadians Regulations

B1. On a scale of 1 to 7, where 1 means not at all familiar and 7 means very familiar, how familiar would you say that you are with the Canadian Food Inspection Agency, also known as the CFIA?

1 – Not at all familiar

2

3

4

5

6

7 – Very familiar

9 – Don't know **[DO NOT READ]**

B2. Have you heard, seen or read anything about the *Safe Food for Canadians* Regulations, which introduces new requirements for food safety and comes into force January 15, 2019?

Yes 1

No 2

Don't know / Not Sure **[DO NOT READ, PROMPT IF NECESSARY]** 9

B2A **[IF B2=YES]** Where did you hear, see or read about the regulations?

Don't know / Refused 99

B3. As far as you know, do you think the new *Safe Food for Canadians* Regulations will apply to your business?

Yes 1

No 2

Not Sure 9

Were you aware that the proposed *Safe Food for Canadians* Regulations require most businesses regulated by CFIA to:

B4. Have a licence from the CFIA

Yes 1

No 2

Don't know 9

B5. Have a written preventive control plan

Yes 1

No	2
Don't know	9

B6. Have product traceability processes

Yes	1
No	2
Don't know	9

B7. From your perspective which of the following three key food safety elements would be the biggest challenge for food businesses? Would it be...

[Randomize 1-3] [Read 1-3]

Licencing	1
Written preventive controls	2
Traceability of food products	3
None of the above	9

Contact with CFIA

I'm now going to ask you about any contact you have had with the CFIA in the last year.

C1a. I will read several statements. Please tell me which activities apply to you or your business over the last 12 months. **[SELECT ALL THAT APPLY, REMIND RESPONDENT OF TIME FRAME AS NECESSARY]**

Looked for information about food safety regulations or requirements on the CFIA's website	1
Contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation, not including permissions, licences, registrations or certifications.	2
Contacted the CFIA for information [not requesting] on a permission, licence or certificate	3
Requested a permission, licence, registration, or certificate from the CFIA	4
Have been inspected by the CFIA within the past 12 months	5
Initiated a product recall either voluntary or ordered	6
I have not looked for information from or had any personal contact with the CFIA over the last 12 months	7
Don't know/ Refused [DO NOT READ]	9

[ASK C1 IF ANY INTERACTION WITH CFIA AT C1A (1-4)]

C1. You stated that you contacted the CFIA for information or a service. How did you access or request the service or information from the CFIA? Was it... **[READ LIST - SELECT ALL THAT APPLY]**

- In person 1
- Over the phone 2
- On the CFIA website 3
- Email 4
- Social media 5
- Other (please specify)_____ 77

C2. On a scale of 1 to 7, where 1 means “do not agree at all” and 7 means “strongly agree”, based on your general impressions of the CFIA, how would you rate the following statements about the CFIA? **[ROTATE STATEMENTS]**

	1 Do not agree at all	2	3	4	5	6	7 Strongly agree	Don't know [DO NOT READ]
e) The CFIA is fair when inspecting food businesses.								
f) The CFIA is efficient in its operations.								
g) It is easy to understand the information the CFIA provides food businesses.								
h) The CFIA provides enough information to meet your regulatory obligations.								
i) Information from the CFIA arrives in a timely manner.								

My CFIA

F1. Have you ever heard, seen or read anything about CFIA’s online portal called “My CFIA?”

- Yes, I used it **[PROMPT FOR USE IF YES]** 1
- Yes, but never used it 2
- No 3
- Don’t know/Refused **[DO NOT READ]** 9

[IF F1=“YES, I USED IT” ASK F1A TO F2A]

F1A Have you ever used the portal for a... **[READ LIST - SELECT ALL THAT APPLY]**

- New licence request 1
- Licence renewal 2
- Permit 3
- Export certificate 4
- Registration 5
- Only enrolled 6

Other (please specify) _____

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F2. Please rate your overall level of satisfaction with “My CFIA” on a scale of 1 to 7, where 1 means not at all satisfied and 7 means very satisfied.

- 1 – Not at all satisfied
- 2
- 3
- 4
- 5
- 6
- 7 – Very satisfied
- 9 – Don’t know **[DO NOT READ]**

F2a. Please expand on why you provide that rating?

Don’t know / Refused 99

F3. **[IF F1= YES, DO NOT READ STATEMENT]**: My CFIA’ is a web portal that provides clients with secure access to a growing number of CFIA services online. It is a convenient and secure way to do business with the CFIA. My CFIA can be used to manage and track service requests online, including permissions such as licences, permits, registrations and export certificates. You can find it at inspection.gc.ca/mycfia (Francais: inspection.gc.ca/monacia)

How likely would you be to use “My CFIA” in the future on a scale of 1-7 where 1 is not at all likely and 7 is very likely?

- 1 – Not at all likely
- 2
- 3
- 4
- 5
- 6
- 7 – Very likely
- 9 – Don’t know **[DO NOT READ]**

F4. **[IF PROVIDED A SCORE FROM 1 TO 7]** Please expand on why you provided that score

Don't know / Refused 99

Compliance Burden

G1. On a scale of 1 to 7 where 1 is not at all burdensome and 7 is very burdensome, how burdensome is the paper work associated with the food regulations in Canada? **[IF NEEDED: "Burdensome" is defined as unnecessary and undue compliance burden – that is, the time and resources spent by business to demonstrate compliance with the federal government regulations.]**

- 1 – Not at all burdensome
- 2
- 3
- 4
- 5
- 6
- 7 – Very burdensome
- 9 – Don't know **[DO NOT READ]**

With respect to your business, please indicate the extent to which you agree with the following statements. Please use a scale of 1 to 7, where 1 means "do not agree at all" and 7 means "strongly agree".

G1A. Over the past 12 months, I've needed to spend less time searching for food safety information I require.

- 1 – Do not agree at all
- 2
- 3
- 4
- 5
- 6
- 7 – Strongly agree
- 8 - I do not search for food safety information **[DO NOT READ]**
- 9 – Don't know **[DO NOT READ]**

G1B. The CFIA takes the needs of businesses into account when developing new regulatory information products.

- 1 – Do not agree at all
- 2
- 3
- 4

- 5
- 6
- 7 – Strongly agree
- 9 – Don't know **[DO NOT READ]**

G2. Thinking about the overall service received from the CFIA in the last 12 months, rate your overall satisfaction. Use a scale from 1-7 where 1 is not at all satisfied and 7 is very satisfied.

- 1 – Not at all satisfied
- 2
- 3
- 4
- 5
- 6
- 7 – Very satisfied
- 9 – Don't know **[DO NOT READ]**

G3. **[IF PROVIDED A SCORE FROM 1 TO 7]** Please expand on why you provided that score.

Don't know / Refused 99

G4. In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements. **[PROBE FOR HOW THEY GET INFORMATION, - THE TYPE OF INFORMATION IS ASKED NEXT AT G4A.]**

Don't know / Refused 99

G4a. What were some of the food safety **topics** you felt were difficult to get clear information on?

None in particular 98
 Don't know / Refused 99

G5. If your business was subject to a CFIA inspection today, how confident are you that you would meet food safety regulations and requirements? Please rate your view on a scale of 1 to 7 where 1 means not at all confident and 7 means very confident.

- 1 – Not at all confident
- 2
- 3

- 4
- 5
- 6
- 7 – Very confident
- 9 – Don't know **[DO NOT READ]**

G6. **[IF PROVIDED A SCORE FROM 1 TO 7]** Please expand on why you provided that answer.

Don't know / Refused 99

That concludes the interview. On behalf of the Canadian Food Inspection Agency thank you very much for your participation in this research. If you are interested in learning more about the CFIA and food safety please consult inspection.gc.ca/SafeFood. The CFIA toolkit for businesses has informative digital tools that can answer whether or not you need a licence and the required timelines, whether or not you need a written preventive control plan, and it outlines any traceability requirements that may apply to your business.