

To:	James Stott, CFIA Carol Murray, CFIA	Date:	January 18, 2006 (Revised from November 10, 2005)
From	Martin Redfern	Subject:	Feed Regulation Research

This memorandum provides a summary of public opinion research conducted by Redfern Research on behalf of the Canadian Food Inspection Agency. The results are based on 1,022 telephone interviews with adult Canadians. Questions are reported in the exact order they were asked. A discussion of the survey methodology is provided in the final section.

Summary

- Canadians oppose the use of SRM materials in feeds for animals other than cattle. (77%)
- Canadians strongly believe that government concerns about inadvertent transmission of BSE through animal feed are *reasonable*. (85%)
- They support a government ban on SRM in feed in general (86%), and also when placed in the context of pet food (81%). This support exists despite the possibility of price increases for beef.
- Failure to amend the regulations could undermine confidence in beef safety. (50% would be less confident)
- Canadians say another case of BSE traced to feed could significantly reduce their beef consumption (42% say they would be less likely to purchase beef.)
- Most Canadians (61%) are not willing to tolerate a small risk of BSE, even to protect the cattle industry. One-third (32%) would accept this risk.
- Support for the government's position and plans on this issue is strong in all regions, including the Prairies. Prairie residents, however, do say they have a higher tolerance for small health risks.

Sommaire des résultats

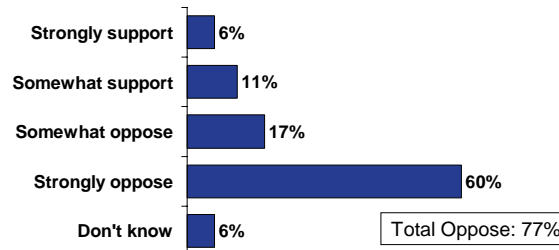
- Les Canadiens s'opposent à l'utilisation de matériels à risques spécifiés pour nourrir d'autres animaux que des bovins. (77%)
- Les Canadiens croient fortement que les inquiétudes du gouvernement à propos d'une propagation accidentelle d'ESB à partir des aliments pour les animaux sont *justifiées*. (85%)
- Ils appuient l'intention du gouvernement de bannir ces parties de la vache de la fabrication des aliments pour les animaux en général (86%) et pour les animaux domestiques en particulier (81%). Cet appui existe même avec la possibilité d'une augmentation du prix du boeuf.
- Une décision de laisser la réglementation telle quelle pourrait miner la confiance des Canadiens en la consommation sécuritaire de boeuf. (50% auraient moins confiance).
- Les Canadiens affirment qu'un autre cas d'ESB causé par un ingrédient infecté faisant partie de l'alimentation des vaches pourrait réduire de façon significative leur consommation de boeuf. (42% disent qu'ils seraient moins susceptibles d'acheter du boeuf.)
- La plupart des Canadiens (61%) ne sont pas prêts à accepter un certain risque, même afin de protéger l'industrie du boeuf. Un tiers (32%) accepteraient ce risque.
- Le résidents de toutes les régions du Canada appuient fortement les positions et plans du gouvernement sur cette problématique, incluant les Provinces des Prairies. Les résidents des Prairies, par contre, affirment avoir une plus grande tolérance pour certains risques sur la santé.

Detailed Findings

When Canadians are told that SRM¹ materials are currently allowed in feed for animals other than cattle, they register strong opposition to the practice. More than three-quarters (77%) oppose the idea, including 60% who *strongly oppose* it.

Support for SRM Material in Animal Feed

As you may know, the BSE disease is concentrated in certain parts of an infected cow, such as its nerve tissue and certain organs. To protect human health, those parts of cows cannot be sold for human consumption in Canada, whether the cow is known to be infected with BSE or not. These parts also cannot be fed back to cows in cattle feed, to prevent the disease from spreading. Right now, farmers are allowed to use these parts of a cow to feed animals other than cattle. Overall, do you strongly support, somewhat support, somewhat oppose, or strongly oppose allowing farmers to do this?



Sample = 1,022 adult Canadians

This first question in the survey may be the most illuminating, as it is presented to respondents without mentioning regulatory change or the relative positions of government and the cattle industry. Without hearing specific arguments for or against the current practice of including SRMs in non-cattle animal feeds, Canadians nonetheless roundly reject the practice.

Opposition to allowing SRMs in non-cattle animal feed exceeds 70% in all regions, peaking in B.C. (84%) and lowest in Québec (70%).

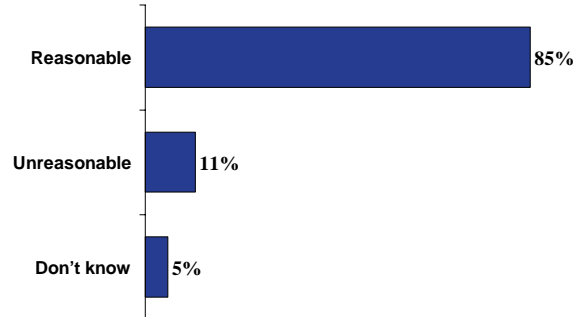
Practice of including SRM material in non-cattle feeds		
Region	Support	Oppose
Atlantic	10%	82%
Québec	26%	70%
Ontario	14%	78%
Manitoba / Saskatchewan	18%	80%
Alberta	15%	81%
British Columbia	11%	84%

Most Canadians (85%) believe that the federal government's concern that infected non-cattle feeds may inadvertently reintroduce BSE disease to cattle is *reasonable*. Only 11% disagree. Thus, very few see this federal concern as excessive or an over-reaction.

¹ The survey questionnaire did not use the terms "SRM" or "Specified Risk Materials", but instead spoke of "the parts of the cow where the BSE disease will concentrate if the cow contracts BSE."

Is Federal Concern Reasonable?

The federal government is concerned that feeds for other animals made from these parts of cows might accidentally reintroduce BSE to the cattle population, due to errors or cross-contamination. Would you say this concern is reasonable or unreasonable?



Sample = 1,022 adult Canadians

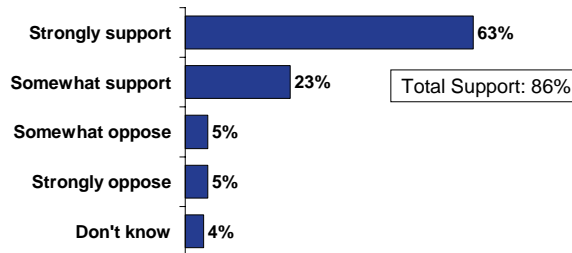
This perception is very high in all regions, and especially in the West. It is equally high across all demographic groups, such as gender, age and income.

Is concern about inadvertent reintroduction of BSE through non-cattle feed reasonable or unreasonable?		
Region	Reasonable	Unreasonable
Atlantic	81%	12%
Québec	77%	16%
Ontario	87%	9%
Manitoba / Saskatchewan	88%	10%
Alberta	90%	8%
British Columbia	90%	6%

When briefly presented with the federal case for banning SRMs from feed, but also with the fact that this ban might increase beef costs, 86% of Canadians support the ban, including 63% who *strongly* support it. About one-in-ten Canadians oppose such a ban.

Support for SRM Feed Ban

The federal government may ban the use of these parts of cows from all animal feeds and fertilizers used in Canada. They say that by eliminating the possibility of accidentally reintroducing BSE to cows, they will control the disease better and eliminate it entirely from Canada much sooner. However, they also say it could lead to an increase of a few cents per pound for beef. Hearing this, do you strongly support, somewhat support, somewhat oppose, or strongly oppose the government plan to ban these cow parts from all animal feed?



Sample = 1,022 adult Canadians

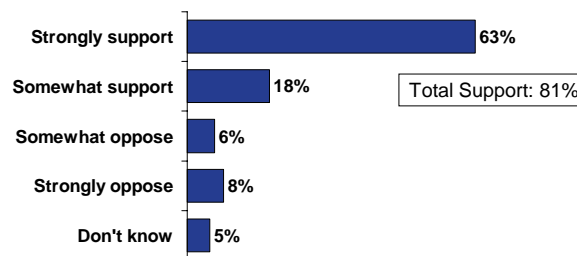
Support for the ban in this context is solid in all regions, including the Prairie Provinces. Support peaks at 92% in British Columbia. Support also increases with income, from 81% among households earning under \$40,000 per year to 91% of those earning more than \$100,000.

Support for ban on SRMs in animal feed, despite cost		
Region	Support	Oppose
Atlantic	86%	9%
Québec	84%	12%
Ontario	87%	9%
Manitoba / Saskatchewan	81%	13%
Alberta	82%	14%
British Columbia	92%	5%

Support for the ban on SRMs in feed is also strong when Canadians are told that this includes pet foods. In this context, 81% support the ban, including 63% who support it strongly.

Support for SRM Feed Ban in Pet Foods

Currently, these parts of cows are used in pet foods. Scientists say that cats could contract a form of BSE from infected pet food, as may other animals. Hearing this, do you strongly support, somewhat support, somewhat oppose, or strongly oppose the government plan to ban these cow parts from all animal feed including pet foods?



Sample = 1,022 adult Canadians

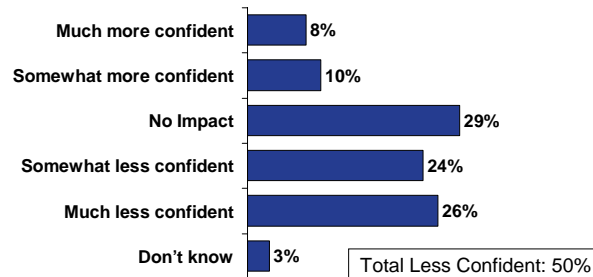
In the context of pet food use, there is strong support for the SRM ban in all regions, including the Prairie Provinces. Support also increases with income, from 74% among households earning under \$40,000 per year to 87% of those earning more than \$100,000.

Support for ban on SRMs in pet foods		
Region	Support	Oppose
Atlantic	79%	15%
Québec	78%	20%
Ontario	83%	11%
Manitoba / Saskatchewan	72%	23%
Alberta	84%	13%
British Columbia	87%	7%

Were the government to *abandon* changes in feed regulations and continue to allow SRMs into non-cattle feed, many Canadians say their confidence in the safety of beef would be shaken. In this situation, one-half of Canadians (50%) say they would have *less confidence* in the safety of beef, including 26% who would have *much less confidence*. For most of the remainder, this would have no impact on their confidence in Canadian beef.

Effect of Leaving Regulations Unchanged

If the government decided to leave regulations as they are and continue to allow these parts of cows to be used in other animal feeds, would you be much more confident, somewhat more confident, somewhat less confident or much less confident in the safety of eating Canadian beef, or would it have no impact?



Sample = 1,022 adult Canadians

Older Canadians are more likely to say they would lose confidence in beef if the regulations were not changed. Fully 57% of those over 55 say they would lose confidence if this happened, compared to 39% of those under 25.

Impact of leaving regulations as they are on confidence in safety of Canadian beef.			
Region	More Confidence	No Impact	Less Confidence
Atlantic	17%	29%	48%
Québec	22%	24%	52%
Ontario	17%	29%	51%
Manitoba / Saskatchewan	12%	37%	48%
Alberta	19%	38%	40%
British Columbia	14%	29%	54%

It is not readily apparent why so many Canadians (18%) would say that leaving regulations alone would *increase* their confidence in beef. However, this question was the first in the survey which moved from the issue of *support for the ban* to the actual *personal consequences* of the ban. These are decidedly different concepts for many Canadians. Evidently, while many would be concerned about beef, others may be more anxious to signal their overall support for the Canadian beef industry.

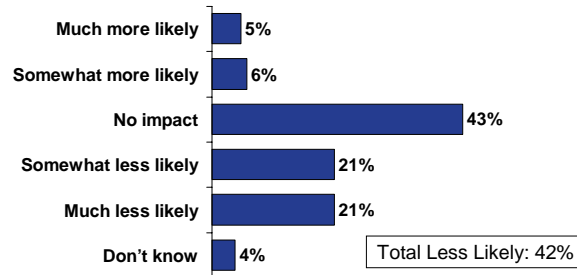
Were another case of BSE to be found in a Canadian cow which could be traced to the (presumably inadvertent) presence of SRMs in its feed, a significant number of Canadians (42%) say they would buy and eat less beef. Specifically 21% say they would be *much less* likely to buy beef, and a further 21% say they would be *somewhat less* likely. A similar number overall (43%) say that this event would have no impact on their purchasing habits.

Once again a number of Canadians (11%) offer the counterintuitive answer that they would buy *more* beef in the wake of another case of BSE. As before, this may stem from a desire to offer the answer that is as supportive as possible to the Canadian beef industry. Others may conceivably regard the detection of another case as evidence of a well-functioning inspection system. As noted below, this response is most common in Québec, where concern is lowest.

These statements indicate only declared intentions, however. Previous sales experience following BSE cases in Canada will also provide useful guidance on this question.

Impact of Another Case Traced to Feed

If another case of BSE was found in a Canadian cow that was caused by infected material in the cow's feed, would you be more or less likely to purchase and eat Canadian beef? Would you be much more likely, somewhat more likely, somewhat less likely or much less likely?



Sample = 1,022 adult Canadians

Between one-third and one-half of Canadians in all regions say they would buy less beef if a feed-related case of BSE was found in Canada.

Impact of a feed-related case of BSE in Canada on likelihood to buy and eat Canadian beef.			
Region	More Likely to Buy	No Impact	Less Likely to Buy
Atlantic	12%	33%	50%
Québec	26%	35%	36%
Ontario	5%	45%	46%
Manitoba / Saskatchewan	9%	52%	33%
Alberta	3%	54%	41%
British Columbia	6%	46%	36%

Women (48%) are significantly more likely than men (36%) to say that they would buy less beef in the aftermath of another case of BSE.

Clearly, the issue of BSE and BSE prevention hinges on the question of *risk tolerance*. Offered the choice between tolerating some small risk of BSE or working toward its complete eradication (with consequent inconveniences and business losses), Canadians generally favour *eradication*.

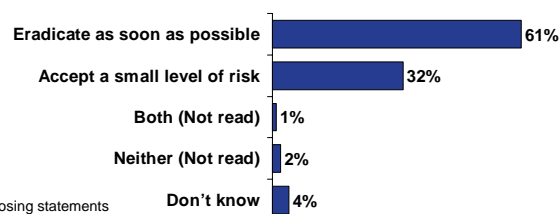
Tolerance for Small Risks

Scientists agree that the overall risk of cattle or humans becoming ill due to BSE disease is small. I'm going to read you a couple of statements people have made about this issue.

Some people say the government should take every measure to eradicate BSE completely and as soon as possible, even if it causes inconvenience and business losses.

Other people say the government and Canadians should be willing to accept a certain small level of risk in order to protect Canada's cattle and beef industries.*

Which comes closest to your own view?



* Two opposing statements were read in random order.

Sample = 1,022 adult Canadians

While 61% say BSE should be eradicated as quickly as possible, only 32% say we should be willing to accept some small risk of BSE. Given that this question was placed in the context of the fact that the risk of BSE transmission is small, it is a clear statement that most Canadians are not ready to embrace a degree of “acceptable risk” when it comes to BSE.

Women (67%) are more likely than men (56%) to say that BSE should be eradicated as quickly as possible, despite inconveniences or business losses.

This question is seen quite differently in different age groups. As the table below shows, older Canadians prefer safety, while younger Canadians are more willing to accept risks. This is remarkable given the few (and smaller) age differences apparent with regard to the other questions in the study. Evidently, this is not solely about BSE, but reflects a different approach to life and risk in these age groups.

Eradicate BSE as quickly as possible, or accept some small degree of risk?		
Age Group	Eradicate	Accept Risk
18-24	44%	46%
25-34	53%	37%
35-44	64%	31%
45-54	63%	31%
55 +	70%	24%

While Prairie Residents show equal levels of concern about BSE and equivalent support for the feed ban, they nonetheless also say they are more willing to accept an ongoing small risk of BSE. As the following table shows, people living in Saskatchewan and Manitoba (and to a lesser extent Alberta) stand out from other Canadians in this regard.

Eradicate BSE as quickly as possible, or accept some small degree of risk?		
Age Group	Eradicate	Accept Risk
Atlantic	63%	27%
Québec	67%	29%
Ontario	60%	32%
Manitoba / Saskatchewan	46%	42%
Alberta	56%	39%
British Columbia	64%	29%

Methodology

The survey was designed and managed by Redfern Research. Fielding was conducted by Decima Research, through the Televox national omnibus survey. Fielding was conducted between November 3 and November 9, 2005.

The results are based on 1,022 telephone interviews with adult Canadians and are considered accurate to within $\pm 3.1\%$, 19 times out of 20. All results are based on representative samples of adult Canadians and have been weighted to reflect the population.

Respondents are chosen randomly from all Canadians using Random Digit Dialing techniques, which ensure that all landline telephones in the country have an equivalent chance of being contacted for the survey.

BSE is a complex subject and survey questions are necessarily long and simplified. SRM material is described in the questionnaire as “the parts of the cow where the BSE disease will concentrate if the cow contracts BSE.” This description was repeated to respondents by interviewers as necessary.

Small numerical discrepancies may be evident due to rounding.

Questions about this report should be directed to Martin Redfern at 613-830-7278 or martin@martinredfern.com.