

Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations Final Report

Prepared for the Canadian Food Inspection Agency

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Canada

Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations

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March 2020

This public opinion research report presents the results of focus groups and a telephone survey conducted by Earnscliffe Strategy Group on behalf of the Canadian Food Inspection Agency. The quantitative research was conducted from January 27 to February 12, 2020 and the qualitative from February 18 to 20, 2020.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique auprès des entreprises du secteur alimentaire pour soutenir le respect de la réglementation en matière de salubrité des aliments.

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Executive summary

In January 2017, the CFIA published the proposed *Safe Food for Canadians Regulations* (SFCR) in the Canada Gazette Part I for consultation. The Regulations were revised based on feedback from stakeholders and published in Canada Gazette II in June 2018 and had a graduated coming into force schedule that started in January 2019. The 2020 milestone dates for coming into force were January 15, 2020, when Fresh Fruit or Vegetables businesses were required to comply with SFCR, and July 15, 2020, when requirements come into force for businesses in the manufactured food sector. Small and micro businesses in the manufactured food sector may have unique challenges in meeting their regulatory obligations.

As part of the CFIA's commitment to delivering timely information and guidance to regulated parties, the Agency has developed a suite of compliance promotion tools and services to help industry in meeting food safety regulations. The new regulations are expected to affect a large number of companies in the manufactured food sector that previously had minimal exposure to the CFIA. Therefore, they are also likely to be unaware of the services and tools the Agency makes available to industry to help them comply with their regulatory obligations. Consequently, the CFIA conducted research to gain insight into food businesses' views about food safety regulations to inform effective implementation of, and compliance with, the SFCR.

Previous CFIA research with food businesses has identified topics about which food businesses are reasonably knowledgeable when it comes to food safety regulations and noted gaps in awareness and understanding. This research sought to explore some of those gaps - for example, small businesses' confidence in their ability to meet food safety regulations compared to larger industry members (the latter is typically more familiar with requirements). Awareness of the name of the Act, *Safe Food for Canadians*, is on the rise, but past research shows that knowledge is still limited. Respondents know more about the specific food safety requirements within the SFCR than they do about the Act and Regulations themselves. Many businesses already follow food safety practices comparable to the requirements of SFCR through third-party food safety certifications (e.g., Global Food Safety Initiative, or GFSI). However, small businesses were less likely to report having a written preventive control plan.

Previous research indicates that while the majority of businesses go to the CFIA website for regulatory guidance or use third-party organizations, like their industry associations, there remains demand for easier and quicker means of getting answers. Past studies also point to concern around getting answers to specific food safety questions businesses may have.

The objective of the research was to gain insight into the Canadian food industry's views on food safety and food safety regulations. Feedback was required from the food industry – with a focus on small food businesses, food and food importers – to determine their awareness and use of products as well as services available to them to support their understanding and compliance. Additionally, the investigation aimed to discover whether or not the CFIA's products and services are effective, clear and meet their needs. This research will be used to inform effective implementation, communications and compliance with the SFCR by supporting the refinement of current products and services as well as the development and promotion of new communications products, services, guidance and tools for regulated parties.

This project included both quantitative and qualitative methodologies. The contract value for this project was \$112,951.22 including HST.

The specific objectives of the research were designed to gain a better understanding of industry’s awareness, motivations, perceptions and attitudes towards:

- The various roles and responsibilities within the food safety system, in particular to measure the level of awareness of their own responsibilities in the system;
- Resource needs and barriers to complying with regulatory requirements, to identify root causes of non-compliance and support development as well as implementation of compliance promotion, communications, and support service activities;
- Current services and expectations on future services and programs; and,
- Gather feedback on specific messaging, as well as compliance promotion tools and communications products.

To meet these objectives, Earncliffe conducted a two-phased research program: quantitative and qualitative.

The first phase was quantitative and involved a telephone survey of 400 individuals who own a food business or work at one in a role such as food safety manager or quality control. Surveys were conducted between January 27 and February 12, 2020 in English and French. The survey took an average of 17 minutes to complete.

Our fieldwork subcontractor for the quantitative portion was Léger. The survey was conducted via telephone from Léger’s centralized call-centre using their state of the art Computer Aided Telephone Interviewing (CATI) system. Léger relied on sample provided by InfoCanada, pre-screened by NAICS codes provided by the CFIA. The following quotas for business size were set:

Micro and small businesses	300
Medium & large businesses	100
TOTAL	400

The wave of qualitative research that followed the quantitative portion consisted of a series of six focus groups with food business owners or individuals who hold a food safety manager or quality control related position in their company. For each group, 6 individuals were recruited as participants. In total, 29 people participated in the focus group discussions. Two sessions were conducted in each of the following cities: Vancouver (February 18, 2020); Mississauga (February 19, 2020); and Montreal (February 20, 2020). The groups in Montreal were conducted in French, while the groups in the other two locations were conducted in English. Please refer to the Recruitment Screener in the Appendix of this report for all relevant screening and qualifications criteria.

In each city, the first group began at 5:30 pm and the second at 7:00 pm. The sessions were approximately 1.5 hours in length. Focus group participants were given an honorarium of \$250 in appreciation of their participation. Appendix B provides greater detail on how the groups were recruited, while Appendix C provides the discussion guide used for the focus groups and Appendix D provides the screener used for recruiting the focus groups.

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

The key findings from the research are presented below.

Quantitative findings

- Half (53%) are very familiar with the CFIA, while another third (32%) are somewhat familiar. When it comes to businesses not exclusively in retail, the proportion who are very familiar may have rebounded slightly from the declining measure from March 2019 (51%), but still is slightly lower than the measure from November 2018 (58%).
- Two-thirds of businesses surveyed (66%) are aware of the Safe Food for Canadians Regulations (SFCR). Awareness of SFCR has risen wave-to-wave since January 2017, when just 39% of businesses had heard of the regulations. Among businesses not exclusively in retail, the previously “registered sector”, awareness has risen too. In November 2018, 52% had heard of the SFCR, compared to 77% this wave.
 - Among those who know of the SFCR, 78% believe the regulations apply to their business.
 - Over half of businesses seem familiar with the SFCR requirements for a preventive control plan and a CFIA licence (61%).
 - Almost three-quarters (72%) claim they know of the requirement to have product traceability processes.
- When it comes to their opinion of the biggest challenges posed by SFCR, businesses are divided. Roughly a quarter say either traceability (28%) or written preventive controls (25%), or do not feel any of the requirements listed are particularly challenging (28%). One in five (19%) say licensing.
- Overall, the businesses surveyed report to understanding the food safety regulations that apply to them. More than three-quarters (79%) say they understand them very clearly. They are also very confident (81%) that their business would pass a CFIA inspection.
- When it comes to existing food safety measures, two-thirds or more of businesses have an internal training program (80%), documented standard food safety procedures (78%), a traceability program (72%) and regularly send staff on food safety training (66%). More than half (59%) have preventive controls in place outlined in a written plan. Forty-seven percent have controls in place, but they are not documented in writing. Over a third (38%) use a food certification or quality control system, while one-in-five use technology such as blockchain (22%).
 - Processors/manufacturers (79%) and wholesalers/distributors (81%) are more likely to have established traceability programs. Processors/manufacturers are also more likely to have written preventive control programs in place (71%). Retailers more frequently send their staff on training courses (71%) compared to other business sectors.
- Overall, attitudes towards the CFIA are generally positive. CFIA inspections are viewed as fair (58% strongly agree) and half strongly agree (50%) that they follow “rigorous logic”. Over half agree (45% strongly, 21% somewhat) they are conducted in a consistent manner. Almost three-quarters agree that guidance is easy to understand (44% strongly agree, 27% somewhat agree).
- The most common ways businesses have come in contact with the CFIA are when looking for information on the CFIA website (43%) or as a result of inspections (41%). Roughly a quarter have contacted the CFIA directly for information or technical advice or initiated a product recall (both 26%). One-in-five have requested a licence,

permission, registration or certificate (22%) or contacted the CFIA for general information about these things (21%).

- Processors and manufacturers seem to have the most frequent interactions with the CFIA, particularly compared to retailers. For example, almost half (47%) of processors and manufacturers have contacted the CFIA for advice compared to just 11% of retailers. More processors and manufacturers also report having been inspected in the last 12 months (48%) compared to retailers (36%).
 - Those who have contacted the CFIA are most likely to do so via the website (51%), followed by over the phone (39%) and via email (37%).
- Knowledge and use of My CFIA varies by industry. A third (30%) of processors and manufacturers say they have used My CFIA while 11% have heard of it but have not used it. In contrast, just 1% of retailers have used it, while 10% are aware, but have not used it.
 - Those who have used the My CFIA portal are generally satisfied with it – 40% are very satisfied and 47% are somewhat satisfied.
 - Two-thirds agree that the CFIA takes the needs of businesses into account when developing new regulatory information products (40% strongly agree).
 - Over half agree (38% strongly) that over the last 12 months, they have spent less time searching for food safety information.
 - The greatest challenge to finding food safety information is that the CFIA website is not clear or difficult to navigate, however just 10% raise this concern, while a quarter claim they have no challenges.

Qualitative findings

Earnscliffe conducted two focus groups in Vancouver, Mississauga and Montreal with individuals who have primary responsibility for the food safety of the food products their business sells or produces. All the participants either worked for or owned a small business (99 employees or less).

- Overall impressions of the CFIA were generally favourable. Those who had interacted with CFIA representatives described them as professional, responsive (as best they could); and, helpful, although, on this point there were some differences of opinion. According to participants, some inspectors are more understanding/collaborative than others.
- Detailed knowledge of SFCR was quite low. When provided with a description of the regulations and asked for their overall impressions, participants understood and agreed with the spirit of the regulations to ensure the safety of Canada's food system, but raised a few concerns in practice, namely:
 - The burden (both in terms of cost and time) the regulations may impose on small businesses with fewer resources to implement new traceability measures, for example.
 - That they may be redundant for larger businesses.
 - That finding information about licensing (both whether they require one and how to obtain one quickly) has proved difficult in the past.
- When it came to non-compliance and penalties, while specific knowledge was limited, most had the sense that the CFIA relied on a number of enforcement activities ranging from warnings, fines, penalties, closures, etc.
 - Most felt the severity of the infraction should dictate the enforcement activity. The majority agreed that

businesses and specific circumstances needed to be treated on a case-by-case basis and within reason.

- The overwhelming majority were comfortable with publishing the names of businesses that were found guilty of a very serious infraction that put the health and safety of Canadians at risk. However, most did not believe it would be fair to publish the names of businesses that were non-compliant on something less serious (i.e., not having a poster hung up on the wall, not using the right jar sizes, etc.).
- While the research specifically explored perceptions of the CFIA’s website, it is worth noting that participants often spontaneously raised the topic at the outset of the groups when explaining their interactions with the CFIA and described it in an unfavourable light because they have had difficulty accessing the information they are looking for.
 - Many participants have relied on Google searches or bookmarks to find what they are looking for on the CFIA’s website, rather than navigating from the main page.
 - When prompted to review the main page, participants tended to agree that most of the information they would be looking for (i.e., information about imports and exports; labelling; recalls; etc.) appeared to be included, but that because of the way it was organized, what they would be looking for was not immediately apparent.
 - Suggestions to improve the website included separating information for consumers and for industry, on the industry page, categorizing the information either by industry sector or food product type, a live chat or dedicated support phone line, and significant improvements to the search function.
- The focus group discussions explored reactions to a variety of draft advertising concepts. Participants were shown three concepts that were designed for distribution via social media – We’re Ready (1 concept) and New Rules for Food Businesses (2 concepts).
- Reactions to the We’re Ready concept were mostly negative. Most were generally confused about the main message and purpose of the ad. Most interpreted the main message as, “We’re ready for an inspection”. However, the image did not imply the people in it were ready, and participants did not feel the message was directed at them.
- Reactions to the New Rules for Food Businesses concept were generally much more favourable. Participants felt the main message was very clear in both executions: that there were new rules in place and that food businesses should learn more about whether they meet the requirements.
 - Reactions to the tone of the first execution of this concept depicting an inspector’s jacket tended to be polarized. Some appreciated the gravity that was implied, while others found it menacing and in contradiction with either their experience with inspectors.
 - The second execution was described as more inviting, welcoming and friendlier.

Research Firm:

Earncliffe Strategy Group Inc. (Earncliffe)
Contract Number: 39903-200798/001/CY
Contract award date: January 7, 2020

I hereby certify as a Representative of Earncliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do

not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed: 

Date: March 31, 2020

Doug Anderson
Principal, Earnscliffe

Introduction

In January 2017, the CFIA published the proposed *Safe Food for Canadians Regulations* (SFCR) in the Canada Gazette Part I for consultation. The Regulations were revised based on feedback from stakeholders and published in Canada Gazette II in June 2018 and had a graduated coming into force schedule that started in January 2019. The 2020 milestone dates for coming into force were January 15, 2020, when Fresh Fruit or Vegetables businesses were required to comply with SFCR, and July 15, 2020, when requirements come into force for businesses in the manufactured food sector. Small and micro businesses in the manufactured food sector may have unique challenges in meeting their regulatory obligations.

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Detailed findings

The findings from the quantitative and qualitative research are presented separately, with the exception of a few brief qualitative insights used to expand upon the results of the survey. Note that the survey included micro, small, medium and large businesses, while the qualitative research included only participants working for micro or small businesses.

Quantitative findings

In addition to the findings of the survey undertaken in January-February 2020, this report also includes tracking data from previous CFIA studies with similar audiences on the same topic. It is important to note that as CFIA information requirements continue to evolve the composition of the overall sample is modified from wave to wave. Many of the questions posed to respondents in November 2018 and March 2019 were not relevant to companies that only sold goods at retail (and did not import, export or produce food products) and were only asked of respondents whose businesses were not exclusively retail. One of the findings of previous waves was that the vast majority of producers also have a retail presence so this wave did not require such separate segments. Consequently, the topline total sample results of this study are not directly comparable in many instances, although they are helpful from a directional view. Unless otherwise noted, any data from the March 2019 and November 2018 studies includes solely responses from businesses not exclusively in retail.

Bolded results presented in this report indicate that the difference between some types of business sectors (agriculture, processor/manufacturer, wholesaler/distributor and retailer) analysed are significantly higher than results found for some other sectors. Unless otherwise noted, differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test. Note that since samples varied wave-to-wave, statistical testing was not conducted for results between waves.

Details about the survey design, methodology, sampling approach, and weighting of the results may be found in the Survey Methodology Report in Appendix A. Percentages may not add up to 100% due to rounding. “Don’t know” and “no response” are denoted by DK and NR respectively.

Section A: Awareness of the CFIA and Safe Food for Canadians Regulations

Half of businesses surveyed (53%) claim to be very familiar with the CFIA, while another third (32%) are somewhat familiar. Over half of processors/manufacturers (55%), wholesalers/distributors (57%) and retailers (52%) are very familiar. Familiarity is highest in Atlantic Canada (65%) and Ontario (59%), and among medium (75%) and large (86%) businesses. In contrast, just over a third (37%) of micro businesses and half of small businesses (49%) report that they are very familiar.

Familiarity among all businesses remains similar to February 2018 – slightly over half then were very familiar (55%) while a third (32%) were somewhat familiar. When it comes to businesses not exclusively in retail, the proportion who are very familiar may have rebounded slightly since March 2019 (51%) but is still lower than results measured in November 2018 (58%).

Qualitative insights: familiarity with the CFIA

- *Familiarity with the CFIA varied between participants in the qualitative research. Typically, food importers and exporters were more familiar, citing the need to deal with a broad range of regulations in their day-to-day business as the reason they had most often come into contact with the CFIA.*

Exhibit A1 – 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?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)	Feb 2018 (n=1533)	Jan 2017 (n=1506)
Very familiar (6-7)	53%	37%	55%	57%	52%	60%	51%	58%	55%	44%
Somewhat familiar (4-5)	32%	63%	31%	28%	31%	27%	33%	29%	31%	34%
Not very familiar (1-3)	14%	N/A	14%	15%	16%	12%	17%	12%	13%	20%
DK/NR	3%	2%	N/A	5%	2%	N/A	N/A	1%	1%	1%

Two-thirds have heard about the SFCR. The proportion who have heard of the regulations is notably higher among agriculture businesses (79%), processors/manufacturers (79%) and wholesalers/distributors (75%), than among retailers (54%). As with familiarity with the CFIA overall, fewer micro (57%) and small businesses (64%) say they have heard of the SFCR than medium (77%) or large (84%) businesses. Awareness of SFCR has risen wave-to-wave since January 2017. For example, in January 2017, just 39% of businesses had heard of the regulations, whereas now, two-thirds have. Among businesses not exclusively in retail, awareness has risen too. In November 2018, 52% had heard of the SFCR, compared to 77% this wave.

Exhibit A2 – S4A. Have you seen, read or heard anything about the Safe Food for Canadians Regulations?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	Nov 2018 (n=370)	Feb 2018 (n=1533)	Jan 2017 (n=1506)
Yes	66%	79%	79%	75%	54%	77%	52%	35%	39%
No	26%	17%	15%	20%	36%	16%	42%	63%	57%
Not sure	8%	4%	6%	5%	11%	7%	6%	2%	4%

*Note the Jan 2017 study asked respondents if they had heard anything about the Safe Food for Canadians Act

The most common places businesses have heard of SFCR are at work/during in-house training (17%), course/training in general (17%), the CFIA website (15%) and online (15%). Retailers in particular are more likely to report hearing of the regulations during in-house training (26%). They are much less likely to have heard of it from the CFIA website (4%), compared to processor/manufacturers (25%) and wholesalers/distributors (23%).

Exhibit A3 - B2A. [IF HEARD ANYTHING ABOUT SFCR] Where did you hear, see or read about the regulations?

	Total (n=264)	Agriculture (n=12)	Processor or manufacturer (n=107)	Wholesaler or distributor (n=29)	Retailer (n=115)
At work/In house training	17%	N/A	12%	9%	26%
Courses / Training	17%	N/A	6%	23%	26%
CFIA Website	15%	20%	25%	23%	4%
Online	15%	5%	15%	12%	17%
CFIA inspector(s)	8%	24%	14%	3%	2%
Ministry of Agriculture, Fisheries and Food (training, emails)	8%	9%	7%	5%	8%
Seminar / Industry meetings	6%	6%	9%	3%	4%
Media (news, newspaper)	4%	N/A	4%	N/A	7%
Newsletter (various)	4%	-	5%	3%	4%
Email / Newsletter from CFIA	4%	18%	2%	3%	4%
Industry magazines	4%	9%	4%	4%	2%
At work / Inhouse training	4%	N/A	12%	9%	26%
At school	3%	N/A	5%	-	2%
Health inspectors	3%	N/A	2%	3%	4%
Manuals	3%	6%	1%	3%	5%
Emails	3%	15%	3%	N/A	1%
Health sector	1%	N/A	N/A	N/A	3%
Government official	1%	N/A	2%	3%	N/A
Public Health Agency of Canada	1%	N/A	N/A	N/A	2%
Health and Safety	1%	N/A	N/A	4%	1%
The City / municipality	1%	N/A	N/A	N/A	2%
Social media	1%	N/A	1%	4%	N/A
Manufacturer	1%	N/A	1%	3%	N/A
Other	5%	5%	6%	8%	3%
DK/NR	3%	9%	1%	7%	3%

Overall, two-thirds believe the SFCRs apply to them. Among non-retail businesses, 74% believe the SFCRs apply to them, up by 11% from November 2018. Three-quarters of processors and manufacturers (76%) believe they apply, significantly higher than the half of retailers (54%) who feel they do. Fewer micro (51%) and small (61%) businesses think SFCR apply to their business compared to medium (83%) and large (81%) businesses. Over a third of micro businesses are unsure if the regulations apply to them (38%) along with 30% of small businesses, significantly more than medium (16%) and large (10%) businesses.

Exhibit A4 – B3. As far as you know, do you think the new Safe Food for Canadians Regulations apply to your business?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	November 2018 (n=370)
Yes	64%	59%	76%	69%	54%	74%	63%
No	8%	12%	9%	5%	8%	8%	11%
DK/NR	28%	29%	15%	26%	37%	17%	26%

Six of the nine fruit, vegetable and grain growers know that new requirements of the SFCR came into force on January 15, 2020.

Exhibit A5 – S4C. Did you know that new requirements of the Safe Food for Canada Regulations came into force for the Fresh Fruit and Vegetable sector on January 15?

	Fruit, vegetable, grain growers (n=9)
Yes	6
DK/NR	3

Almost half (48%) of businesses in the manufactured food sector do not know that new requirements for their sector come into force on July 15, 2020.

Exhibit A6 – S4D. Did you know that new requirements for this sector come into force on July 15, 2020?

	In manufactured food sector (n=67)
Yes	42%
No	48%
Not sure	10%

Well over half of businesses are aware that the SFCR requires them to have a licence from the CFIA (61%) and a written preventive control plan (61%). Almost three-quarters (72%) are aware that the SFCR requires them to have traceability processes. Overall, the non-retail only businesses have a better understanding of what is required than those in retail exclusively. Their knowledge has also grown since November 2018. For example, in 2018, just 52% were aware of the requirement to have a licence from the CFIA, compared to 74% now.

Overall, small and micro businesses are significantly more likely to say they are not aware of SFCR requirements. For example, 41% of micro and 39% of small businesses do not know about the licence requirement, compared to just 7% of medium and 5% of large businesses.

Exhibit A7 – B4-B6. Were you aware that the Safe Food for Canadians Regulations require most businesses regulated by CFIA to: (% YES)

	Total (n=400)	Agriculture (n=16)	Processor or manufac- urer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	Nov 2018 (n=370)
Have a licence from the CFIA	61%	71%	72%	68%	51%	74%	52%
Have a written preventive control plan	61%	78%	74%	72%	49%	72%	60%
Have product traceability processes	72%	83%	83%	72%	63%	80%	74%

Qualitative Insights: Awareness and Understanding of SFCR

- *Many in the focus groups had heard of SFCR, but detailed, unprompted knowledge was limited. It is worth noting that focus groups were conducted solely with micro and small businesses, and their lack of familiarity may reflect some of the uncertainty in the quantitative portion among respondents in the same categories.*
- *Once provided with a description of the regulations (see the discussion guide in Appendix D) it appeared that there was a difference when considering the regulations from an aspirational vs. practical perspective. Participants agreed with the spirit of the regulations to ensure the safety of Canada’s food system, but thought they may be difficult for small businesses to comply with and, on the other hand, may be redundant for big businesses already doing what the regulations require.*

When it comes to the biggest challenges posed by SFCR, opinions are divided. About a quarter say either traceability (28%) or written preventive controls (25%), while one in five say licensing (19%). A quarter (28%) do not feel any of those three are the biggest challenge. Retailers (30%) and processors/manufacturers (30%) are more likely than those in agriculture (25%) or wholesalers/distributors (12%) to report that traceability would be the biggest challenge. Medium and large businesses are more likely to report that none of the elements are challenging (40% and 62%, respectively) compared to micro (32%) and small (22%) businesses.

Compared to previous waves, a greater proportion of non-retail only respondents do not feel any of the elements will be the biggest challenge for them (34%, compared to 9% in 2019 and 8% in 2018).

Qualitative insights: biggest challenges of SFCR

- Unlike in the quantitative phase of research, participants in the qualitative phase implied slightly more pronounced concerns about the challenges meeting the requirements of SFCR. Although many felt that they were prepared because they had routinized many elements before the requirements were introduced, those who were concerned were often uncertain about whether and how they were impacted.
- Most participants in the focus groups cited traceability requirements as the most challenging element of SFCR. They explained the amount of paperwork, knowledge, training, monitoring, etc. is a huge burden. To meet this challenge, many spoke of having hired dedicated staff and/or outside consultants to manage this element specifically, which not all could afford.
- Second to traceability, licensing was also cited as a challenging element of the SFCR. For some, there appeared to be confusion about whether they required a licence. For others, there appeared to be confusion about how to acquire a licence and how quickly.

Exhibit A8 – B7. From your perspective which of the following three key food safety elements of the SFCR would be your biggest challenge? Is it...

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)
Traceability of food products	28%	25%	30%	12%	30%	24%	45%	42%
Written preventive controls	25%	25%	25%	43%	22%	27%	30%	26%
Licensing	19%	14%	17%	22%	20%	15%	16%	24%
None of the above	28%	37%	28%	24%	27%	34%	9%	8%

Section B: Understanding of food safety regulations and existing food safety measures

Most (79%) feel they very clearly understand the food safety regulations that apply to their food. Retailers are particularly confident (86%). Overall, three-quarters of non-retail only businesses (76%) feel they understand regulations that apply to their food very clearly, an increase from March 2019 (69%) and in line with November 2018 (78%).

Exhibit B1 – 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?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	March 2019 (n=500)	Nov 2018 (n=370)	Feb 2018 (n=1533)	Jan 2017 (n=1506)
Very clearly (6-7)	79%	76%	69%	79%	86%	69%	78%	80%	73%
Somewhat clearly (4-5)	17%	24%	25%	16%	12%	23%	18%	18%	22%
Not very clearly (1-3)	3%	N/A	4%	5%	2%	16%	3%	1%	3%
DK/NR	1%	N/A	1%	N/A	N/A	1%	N/A	1%	1%

Most (83%) have a traceability process in place. In November 2018, when the question was asked only of those whose business is exclusively retail, 74% reported having such a process, compared to 81% this wave.

Exhibit B2 – S4. Do you have a process in place that will allow you to trace back your food to the company that supplied it?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Retail only (n=213)	Nov 2018 Retail only (n=300)
Yes	83%	75%	84%	82%	82%	81%	74%
No	15%	25%	13%	18%	16%	18%	24%
Not sure	2%	N/A	2%	N/A	2%	2%	2%

Two-thirds or more have an internal training program (80%), documented standard food safety procedures (78%), a traceability program (72%) and regularly send staff on food safety training (66%). Over half (59%) have preventive controls in place outlined in a written plan. Fewer have controls in place that are not documented in writing (47%). Over a third (38%) use a food certification or quality control system, while one in five use technology such as blockchain (22%). Processors/manufacturers (79%) and wholesalers/distributors (81%) are more likely to have established traceability programs. Processors/manufacturers are also more likely to have written preventive control programs in place (71%). Retailers more frequently send their staff on training courses (71%) compared to other business sectors. Compared to March 2019 and November 2018, when the question was asked only of respondents not exclusively in retail, the proportion of businesses not exclusively in retail who have internal training, written standard operating procedures, traceability programs, written preventive controls and a food safety or quality control system has increased. Compared to February 2018, when the question was asked of all respondents, the proportion of businesses who do each activity listed below has risen.

Overall, larger businesses are more likely to do most of these activities than smaller ones. For example, 95% of large and 94% of medium business have a traceability program, compared to 69% of small businesses and 57% of micro businesses. Similarly, over 80% of large and medium businesses have written preventive control plans, compared to 59% of small and 25% of micro businesses.

Exhibit B3 – A3. Which of the following activities, if any, applies at your company:

	Total (n=400)	Agriculture (n=16)	Processor or manufactur er (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non- retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)	Feb 2018 (n=1533)
Has an internal training program on food safety	80%	80%	87%	70%	76%	83%	71%	77%	63%
Has written/docu mented standard operating procedures on food safety.	78%	80%	82%	69%	77%	86%	43%	78%	64%
Has a traceability program established	72%	68%	79%	81%	66%	83%	62%	77%	56%
Regularly sends staff on food safety training	66%	43%	63%	59%	71%	68%	54%	54%	51%
Has preventive controls in place, which are outlined in a written plan (HACCP based plan, QMP or other)	59%	58%	71%	59%	51%	71%	33%	64%	45%
Has preventive controls in place, but not written or documented in a plan	47%	43%	39%	37%	53%	35%	24%	41%	43%
Uses a food safety or quality control certification system such as GFSI, ISO or QMP	38%	39%	50%	39%	30%	48%	22%	47%	33%

Uses technology such as blockchain or similar digital systems to assist food safety	22%	9%	16%	26%	26%	22%	N/A	N/A	N/A
None of the above	2%	14%	1%	4%	2%	3%	8%	3%	8%

Whether or not they participate in one, most (79%) support the role of private certification schemes in achieving compliance with food safety regulations.

Exhibit B4 – A31. Whether or not you participate in a private certification scheme, do you support their role in achieving compliance with food safety regulations?

	Total (n=400)	Agriculture (n=16)	Processor or Manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)
Yes	79%	89%	80%	72%	78%
No	8%	N/A	7%	8%	10%
DK	13%	11%	13%	20%	12%

Section C: Confidence in ability to meet food safety regulations

An overwhelming majority (80%) are very confident in their ability to pass a CFIA inspection. Confidence is high across all business sectors. In February 2018, businesses were more confident (94%), though this wave’s results are in keeping with those from January 2017, when 83% were very confident. When it comes to businesses not exclusively in retail, confidence is almost unchanged from November 2018, when 86% were very confident, compared to 84% today.

Exhibit C1 – 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.

	Total (n=400)	Agriculture (n=16)	Processor or manufacur er (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non- retail only (n=187)	Nov 2018 (n=370)	Feb 2018 (n=1533)	Jan 2017 (n=1506)
Very confident (6-7)	80%	84%	77%	69%	85%	84%	86%	82%	83%
Somewhat confident (4-5)	15%	16%	18%	20%	11%	12%	11%	15%	12%
Not very confident (1-3)	2%	N/A	2%	5%	2%	3%	2%	2%	1%
DK/NR	2%	N/A	1%	5%	2%	2%	1%	2%	3%

The most often cited reasons for businesses’ confidence in their ability to pass inspection are that they have received positive feedback in the past (35%), they follow the rules (34%) and have a food safety program in place (25%). It is worth noting that a greater proportion of small and medium sized businesses link the fact that they have a full food safety program in place (25% and 34%, respectively) compared to micro businesses (13%). Businesses in Ontario and the West were more likely to base their confidence in having recently passed an audit (13% and 12%) compared to respondents in Quebec (2%).

Exhibit C2 - G6. [IF VERY CONFIDENT, PROVIDED A SCORE FROM 6 TO 7] Please expand on why you provided that answer.

	Total (n=322)	Agriculture (n=14)	Processor or manufacturer (n=103)	Wholesaler or distributor (n=26)	Retailer (n=178)
We are inspected regularly/have received positive feedback	35%	43%	40%	23%	34%
We follow the rules/comply with regulations	34%	27%	32%	43%	35%
We have a full food safety program in place	25%	25%	23%	28%	26%
We have recently passed an audit	10%	N/A	12%	N/A	11%
We keep everything clean/organized	7%	N/A	7%	11%	8%
We keep our documentation/paperwork	5%	14%	5%	5%	4%
We have never had an issue in the past	5%	N/A	4%	N/A	7%
Always room for improvement	3%	N/A	3%	N/A	4%
Not fully aware of all the regulations	2%	N/A	2%	N/A	2%
Inspectors always find something to improve upon	2%	N/A	4%	N/A	1%
We only carry low-risk products	1%	N/A	N/A	6%	1%
We are a small business	1%	N/A	N/A	3%	N/A
Other	3%	8%	1%	N/A	4%
DK/NR	1%	N/A	5%	N/A	2%

Section D: Familiarity with establishment risk analysis

Few have heard a great deal about Establishment-based Risk Analysis (16%), particularly among retailers (11%). Over half of businesses have not heard much (31%) or have not heard anything (25%). Businesses in Atlantic Canada and Quebec (both 29%) are more likely to have heard a great deal than those in Ontario (11%) and the West (9%). The few large businesses in the sample (45%), the medium-sized businesses (24%) and small businesses (15%) are all more likely to have heard a great deal about Establishment-based Risk Analysis compared to micro businesses (6%). Those who have contacted the CFIA are more likely to have heard a great deal (21%) or some (30%) about Establishment-based Risk Analysis (30%) than those who have not (11% have heard a great deal and 21% have heard some).

Exhibit D1 – B1A. As you may know the CFIA assesses risk to help determine which types of companies need to be inspected. This is often referred to as Establishment-based Risk Assessment. How much have you read or heard about Establishment Risk Analysis.

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)
A great deal	16%	22%	21%	23%	11%
Some	26%	42%	30%	21%	22%
Not much	31%	37%	29%	29%	33%
Nothing at all	25%	N/A	18%	23%	30%
Rather not say	3%	N/A	3%	4%	3%

Section E: Impressions of the CFIA

CFIA inspections are viewed as fair (58% strongly agree) and generally logical (50%). Over half agree (45% strongly, 21% somewhat) they are conducted in a consistent manner. Almost three-quarters agree that guidance is easy to understand (44% strongly agree, 27% somewhat agree), and significantly fewer find regulatory guidance inconsistent (6% strongly agree, 17% somewhat agree) than do not (48% disagree).

There are a few differences in attitudes between sectors. For example, retailers are more likely to agree than agriculture and processor/manufacturer businesses to agree that CFIA guidance is easy to understand. Processors and manufacturers may be slightly more frustrated by the CFIA's responsiveness, as 11% strongly agree that the Agency is not responsive, compared to just 2% of wholesalers/distributors and 4% of retailers.

Medium sized businesses are more likely than micro, small and large businesses to strongly agree that it is easy to understand CFIA guidance (62%) and that inspections follow rigorous logic (65%). They are also more likely than micro and small businesses to strongly agree that the CFIA is fair when inspecting businesses (80%), that they are consistent in inspections (67%), and that information arrives in a timely manner (68%).

Compared to previous waves, more businesses that are not exclusively retail strongly agree the CFIA is fair when conducting inspections (65% compared to 55% in March 2019 and 52% in November 2018). Similarly, more strongly agree that information arrives in a timely manner this wave (53%) than in November 2018 (44%). Compared to November 2018, more (43% vs 38%) strongly agree that guidance is easy to understand, though an even greater proportion strongly agreed in March 2019 (53%).

Qualitative insights: impressions of the CFIA

- Overall impressions of the Agency were favourable.
- Those who had been inspected described CFIA representatives as professional and responsive. However, it is worth noting that participants' experience with inspectors in terms of the consistency of their inspections varied. Participants explained that some inspectors were better than others (i.e., more understanding, more helpful, more collaborative, etc.).

Exhibit E1 – 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? (% Agree, 6-7)

The CFIA is fair when inspecting food businesses.	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)
	58%	36%	60%	66%	57%	65%	55%	52%
The CFIA inspections are conducted in a consistent manner.	45%	27%	41%	49%	48%	48%	N/A	N/A
It is easy to understand the guidance the CFIA provides food businesses.	44%	22%	37%	43%	51%	43%	53%	38%
The CFIA is not responsive when I ask regulatory questions	6%	4%	11%	2%	4%	8%	N/A	N/A
Information from the CFIA arrives in a timely manner.	47%	34%	49%	59%	46%	53%	N/A	44%
CFIA inspections follow rigorous logic	50%	37%	47%	57%	52%	53%	N/A	N/A
CFIA regulatory guidance is inconsistent	11%	6%	15%	13%	9%	11%	N/A	N/A

Section F: Contact with CFIA

The most common ways businesses have come in contact with the CFIA are looking for information on the CFIA website (43%) or as a result of inspections (41%). Roughly a quarter have contacted the CFIA directly for information or technical advice or initiated a product recall (both 26%). One-in-five have requested a licence, permission, registration or certificate (22%) or contacted the CFIA for general information about these things (21%). Processors and manufacturers seem to have the most frequent interactions with the CFIA. For example, almost half (47%) have contacted the CFIA for advice, and more report having been inspected in the last 12 months (48%). Retailers are the least likely of the food business sectors to have had contact with the CFIA. In fact, over a third (36%) have not contacted the Agency in the last 12 months. Micro (43%) and small (32%) businesses are much more likely to not have contacted the CFIA than medium (9%) and large (13%) businesses.

The proportion who have looked for information on the CFIA website is steady across all waves. An identical proportion in January 2017 had looked for information on the website (43%), just slightly less than in February 2018. When it comes to businesses not exclusively in retail, the trend holds. Over half (58%) this wave have looked for information on the website, similar to March 2019 (57%) and November 2018 (56%).

Exhibit F1 – C1A. I'm now going to ask you about any contact you have had with the CFIA in the last year. I will read several statements. Please tell me which activities apply to you or your business over the last 12 months.

	Total (n=400)	Agriculture (n=16)	Processor or manufacur er (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non- retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)	Feb 2018 (n=1533)	Jan 2017 (n=1506)
Looked for information about food safety regulations or requirements on the CFIA's website	43%	65%	62%	57%	27%	58%	57%	56%	46%	43%
Have been inspected by the CFIA within the past 12 months	41%	37%	48%	43%	36%	50%	42%	47%	38%	41%
Contacted the CFIA directly for information or technical advice on food safety regulations or regulatory interpretation	26%	37%	47%	30%	11%	39%	34%	33%	23%	N/A
Initiated a product recall either	26%	N/A	18%	17%	35%	26%	15%	21%	N/A	N/A

voluntary or ordered										
Requested a permission, licence, registration, or certificate from the CFIA	22%	39%	38%	44%	6%	38%	34%	24%	21%	N/A
Contacted the CFIA for general information [not requesting] on a permission, licence or certificate	21%	27%	37%	32%	9%	35%	33%	26%	N/A	N/A
I have not looked for information from or had any personal contact with the CFIA over the last 12 months	29%	31%	18%	28%	36%	20%	1%	35%	23%	28%
DK/NR	3%	N/A	1%	6%	4%	1%	2%	N/A	2%	6%

Those who have contacted the CFIA are most likely to do so via the website (51%), followed by over the phone (39%) and via email (37%). Processors and manufacturers’ preferences are slightly different, with half (50%) reporting that they contact the CFIA for information over the phone, more than the website (46%) or email (45%). Of note, a smaller proportion of non-retail only businesses this wave (44%) contacted the CFIA through the website than in March 2019 (63%) and November 2018 (52%).

Exhibit F2 – C1. [IF CONTACTED CFIA FOR ADVICE/INFO] 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...

	Total (n=195)	Agriculture (n=11)	Processor or Manufacturer (n=92)	Wholesaler or distributor (n=23)	Retailer (n=69)	Non-retail only (n=119)	March 2019 (n=348)	Nov 2018 (n=248)	Feb 2018 (n=514)
CFIA Website	51%	58%	46%	42%	61%	44%	63%	52%	26%
Over the phone	39%	46%	50%	37%	23%	45%	48%	44%	37%
Email	37%	33%	45%	45%	23%	42%	48%	41%	22%
In person	21%	57%	26%	16%	9%	28%	21%	28%	8%
Social media	1%	N/A	1%	N/A	2%	N/A	1%	3%	1%
Other	5%	N/A	3%	3%	8%	2%	3%	3%	2%

Those who contacted the CFIA for advice or information are generally satisfied with the overall service they received. In fact, three-quarters (74%) are very satisfied. Retailers in particular (85%) are very satisfied. Satisfaction among all businesses has risen from 2018, when 61% were very satisfied. It appears to have increased significantly for non-retail only businesses, though this may be due to the fact that the question was asked of all respondents, rather than just those who had interacted with the CFIA, in 2019 and November 2018.

Qualitative insights: satisfaction with the CFIA website

- *The CFIA website was often raised spontaneously at the outset of the focus groups because it is a common way in which most have interacted with the CFIA.*
- *Unlike survey respondents’ overall satisfaction with the service they have received from the CFIA, most participants’ views initially were unfavourable, largely because they previously had found the site difficult to navigate.*
- *When prompted to review the homepage, most agreed that the information they might need could be found there (i.e., information about imports and exports; labelling; recalls; etc.). However, they felt they might have difficulty finding the information because of the way the site is organized. They explained that one is required to read all of the links to discern which might best fit with their information needs, which requires more time and energy than they were willing to commit.*

Exhibit F3 – G2. [IF CONTACTED CFIA FOR ADVICE/INFO] 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.

	Total (n=195)	Agriculture (n=11)	Processor or manufactur er (n=92)	Wholesaler or distributor (n=23)	Retailer (n=69)	Non- retail only (n=119)	March 2019 (n=500*)	Nov 2018 (n=370*)	Feb 2018 (n=514)
Very satisfied (6-7)	74%	63%	67%	77%	85%	73%	45%	43%	61%
Somewhat satisfied (4-5)	22%	37%	27%	24%	12%	23%	33%	29%	25%
Not satisfied (1-3)	4%	N/A	5%	N/A	3%	4%	9%	11%	5%
DK/NR	1%	N/A	1%	N/A	N/A	N/A	13%	16%	9%

**Note that in March 2019 and November 2018, this question was asked of all respondents (whose businesses were not exclusively retail) rather than just those who said they had an interaction with CFIA.*

Those who are very satisfied with service from CFIA cite the high quality of information (35%), good customer service (31%) and responsive service (24%) as key drivers of their positive impression.

Exhibit F4 – G3. [IF CONTACTED CFIA FOR ADVICE/INFO, VERY SATISFIED W SERVICE] Please expand on why you provided that score.

	Total (n=148)	Agriculture (n=7)	Processor or manufacturer (n=65)	Wholesaler or distributor (n=18)	Retailer (n=58)
High quality of information provided	35%	33%	30%	18%	48%
Helpful / good customer service	31%	47%	22%	40%	37%
Responsive service	24%	26%	30%	42%	11%
No problems / no issues	17%	N/A	20%	15%	16%
Room for improvement (general)	7%	N/A	13%	N/A	4%
Room for improvement (website)	4%	10%	8%	N/A	1%
Require more information / haven't heard from them	1%	10%	2%	N/A	N/A
Difficult to keep up with regulations / process	1%	N/A	3%	N/A	N/A
Other	0%	N/A	1%	N/A	N/A
DK/NR	2%	N/A	N/A	N/A	5%

Note that in March 2019 and November 2018, this question was asked of all respondents (whose businesses were not exclusively retail) rather than just those who said they had an interaction with CFIA.

Section G: My CFIA

Few (16%) have used My CFIA and almost three-quarters (72%) have not heard of it. However, the proportion who have used it overall is dragged down by the small percentage of retailers (1%) who say they have. In contrast, 30% of processors and manufacturers say they have used My CFIA, along with half (53%) of the few agriculture businesses surveyed and 35% of wholesalers/distributors. Overall awareness is up to 26% from 6% in January 2017 and 11% in February 2018. Awareness among businesses not exclusively in retail is almost identical to March 2019. Identical proportions in 2019 had used it (32%) or heard of it but not used it (12%).

Exhibit G1 – F1. Have you ever heard, seen or read anything about CFIA's online portal called "My CFIA"?

	Total (n=400)	Agriculture (n=16)	Processor or Manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)	Feb 2018 (n=1533)	Jan 2017 (n=1506)
Total Yes	26%	59%	41%	49%	11%	44%	44%	26%	11%	6%
Yes, I used it	16%	53%	30%	35%	1%	32%	32%	14%	3%	N/A
Yes, but never used it	10%	6%	11%	14%	10%	12%	12%	13%	8%	N/A
No	72%	33%	58%	51%	88%	54%	55%	72%	88%	91%
DK/NR	1%	7%	1%	N/A	2%	2%	1%	1%	1%	2%

Those who have used the My CFIA portal report most often doing so to request a new licence (69%), for registration (45%) and licence renewal (32%). A quarter have used it to obtain an export certificate (24%) while 16% used it to obtain a permit. A quarter (24%) claim they have only enrolled, and not used it for anything else yet. Compared to November 2018, use of the portal among non-retail only businesses for some activities other than simply enrolling (e.g. new licence requests and registration) has risen. However, this wave's results mirror those from March 2019 fairly closely. Almost identical proportions used the portal to request a new licence, for registration, or to renew a licence. Slightly more used it to obtain an export certificate or permit.

Exhibit G2 – F1A. [IF USED PORTAL] Have you ever used the portal for a...

	Total (n=64)	Agriculture (n=8)	Processor or manufacturer (n=42)	Wholesaler or distributor (n=12)	Retailer (n=2)	Non-retail only (n=59)	March 2019 (n=183)	Nov 2018 (n=65)
New licence request	69%	49%	70%	80%	50%	70%	68%	31%
Registration	45%	43%	54%	22%	N/A	46%	44%	24%
Licence renewal	32%	22%	40%	16%	N/A	33%	32%	33%
Only enrolled	24%	14%	26%	21%	50%	23%	28%	46%
Export certificate	24%	30%	29%	6%	N/A	24%	15%	16%
Permit	16%	14%	16%	9%	100%	16%	10%	16%
Other	6%	N/A	5%	5%	50%	6%	10%	13%
DK/NR	7%	14%	5%	9%	N/A	4%	3%	7%

Those who have used the portal are generally satisfied with it – 40% are very satisfied and 47% are somewhat satisfied. Very few (10%) are not satisfied. Satisfaction among non-retail only businesses is higher than November 2018, when just 26% were very satisfied, but is lower than it was in March 2019. Last year, 46% were very satisfied, compared to 40% this year.

Exhibit G3 – F2. [IF USED PORTAL] 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.

	Total (n=64)	Agriculture (n=8)	Processor or Manufacturer (n=42)	Wholesaler or distributor (n=12)	Retailer (n=2)	Non-retail only (n=59)	March 2019 (n=183)	Nov 2018 (n=65)	Feb 2018 (n=52)
Very satisfied (6-7)	40%	57%	30%	61%	50%	40%	46%	26%	76%
Somewhat satisfied (4-5)	47%	30%	56%	28%	50%	49%	38%	40%	20%
Not satisfied (1-3)	10%	14%	10%	11%	N/A	8%	15%	25%	3%
DK/NR	2%	N/A	4%	N/A	N/A	3%	1%	9%	1%

Those who are very satisfied with the portal for the most part say this is because they have not encountered any problems and have had good service using it. Those who are somewhat satisfied are more critical of the design, with 59% reporting it is not user friendly.

Exhibit G4 – F2A. [IF VERY SATISFIED, 6-7] Please expand on why you provide that rating.

	Total (n=24)	Agriculture (n=4)	Processor or Manufacturer (n=12)	Wholesaler or distributor (n=7)	Retailer (n=1)
Good service/no problems	70%	100%	72%	45%	100%
Too much/difficult to find relevant info	6%	N/A	N/A	21%	N/A
Customer service is not responsive enough	6%	N/A	13%	N/A	N/A
Design not user-friendly	5%	N/A	10%	N/A	N/A
Confusing/not clear	4%	N/A	N/A	15%	N/A
Room for improvement	3%	N/A	6%	N/A	N/A
Other	3%	N/A	N/A	11%	N/A
DK/NR	3%	N/A	N/A	9%	N/A

Exhibit G5 – F2A. [IF SOMEWHAT SATISFIED, 4-5] Please expand on why you provide that rating.

	Total (n=24)	Agriculture (n=4)	Processor or manufacturer (n=12)	Wholesaler or distributor (n=7)	Retailer (n=1)
Design not user-friendly	59%	100%	61%	32%	N/A
Not enough info	13%	N/A	10%	45%	N/A
Confusing/not clear	11%	N/A	12%	N/A	100%
Too much/difficult to find relevant info	11%	N/A	4%	N/A	N/A
Good service/no problems	11%	N/A	15%	9%	N/A
Difficulty signing up	3%	N/A	N/A	24%	N/A
Customer service is not responsive enough	3%	N/A	4%	N/A	N/A
Room for improvement	2%	N/A	3%	N/A	N/A
Other	2%	N/A	3%	N/A	N/A
DK/NR	4%	N/A	5%	N/A	N/A

The plurality (42%) of those who have not used the portal are under the impression that their company does not have a Safe Food for Canadians Licence, a food export certificate or another type of certification from the CFIA. Just under a third (31%) believe their business has a Safe Food for Canadians Licence. Few believe they have a food export certificate (7%) or another type of licence/certificate from the CFIA (11%).

Exhibit G6 – F1B. [IF DID NOT USE PORTAL] To the best of your knowledge which of the following licences or permissions does your company have from the CFIA?

	Total (n=331)	Agriculture (n=7)	Processor or manufacur er (n=91)	Wholesaler or distributor (n=25)	Retailer (n=207)
Safe Food for Canadians Licence	31%	N/A	30%	48%	30%
Food export certificate	7%	N/A	14%	16%	3%
Another type of licence/certifi cate from CFIA	11%	11%	13%	19%	10%
None of the above	42%	72%	43%	27%	42%
DK/NR	19%	17%	20%	16%	19%

Section H: CFIA information

Over a third strongly agree (38%) while 22% somewhat agree that over the last 12 months, they have needed to spend less time searching for food safety information. Retailers are significantly more likely than processors and manufacturers (44% vs 28%) to strongly agree. A greater proportion of non-retail only respondents strongly agree that they have had to spend less time looking for information (37%) compared to March 2019 (26%) and November 2018 (31%).

Small (42%) and medium (44%) sized businesses are more likely than micro businesses (20%) to strongly agree they had to spend less time searching for information. A plurality of importers (42%) also agree they have spent less time searching for information.

Well over a third (40%) strongly agree that the CFIA takes the needs of businesses into account when developing information products, while almost half (47%) somewhat agree. Of note, wholesalers and distributors are most likely to strongly agree (59%). Non-retail only businesses' views have improved from March 2019, when just 29% strongly agreed, compared to 47% now. Medium sized businesses are much more likely (61%) to strongly agree that the CFIA takes businesses into account than micro (33%) and small (36%) businesses.

Exhibit H1 – 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". [STRONGLY AGREE]

	Total (n=400)	Agriculture (n=16)	Processor or manufac- er (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non- retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)
Over the past 12 months, I've needed to spend less time searching for food safety information I require.	38%	27%	28%	44%	44%	37%	26%	31%
The CFIA takes the needs of businesses into account when developing new regulatory information products.	40%	33%	37%	59%	40%	47%	29%	31%

For those who find there are challenges accessing information on food safety regulations, the biggest problems seem to be website navigability (10%) and a general lack of clear information (9%). Exporters in particular seem to have issues with the website - 20% cite it as an issue, compared to 12% of importers and 9% of retailers. Despite the concerns of some, one quarter explicitly state they have had no issues, while a third (36%) do not know or do not offer a response. It is worth noting that retailers are most likely to report not having any issues finding information (31%). When it comes to businesses not exclusively in retail, both the issues and proportion who experience them have not changed drastically from March 2019.

Exhibit H2 – G4. In your opinion, what is the biggest challenge in finding information on food safety regulations or requirements?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)
Website is not user-friendly/difficult to navigate	10%	19%	11%	13%	8%	11%	11%	12%
Lack of clear information/difficult to understand	9%	N/A	14%	8%	6%	11%	15%	12%
Too much information/high volume of information	5%	27%	6%	5%	2%	7%	11%	7%
Difficult to search for/find information	5%	N/A	7%	6%	4%	7%	3%	18%
Research/finding information is too time-consuming	4%	N/A	4%	7%	3%	3%	7%	2%
Finding the time/lack of time	2%	N/A	3%	N/A	1%	1%	1%	2%
Difficult to find information on specific products	2%	7%	1%	2%	1%	2%	1%	4%
Lack of notifications/updates	1%	N/A	1%	N/A	N/A	1%	6%	8%
Lack of contact with customer service/not responsive	1%	N/A	2%	4%	1%	1%	2%	5%
Difficult to find information specific to my industry	1%	N/A	5%	N/A	N/A	2%	1%	3%
Other mention	6%	7%	9%	8%	2%	6%	1%	3%

DK/NR	36%	40%	27%	19%	43%	31%	5%	20%
None	25%	7%	18%	28%	31%	23%	34%	23%

Over half (58%) do not feel there are any food safety topics that are hard to get clear information on. Retailers (72%) and wholesalers and distributors (60%) are most likely to report that there are no topics in particular that are hard to get information on. Processors are more likely to find information on labelling (12%) difficult to obtain compared to wholesalers (2%) and retailers (4%).

Non-retail only businesses’ views on this topic have not changed much since 2019. Almost half (48%) do not have any topics they found challenging to obtain information about, the same proportion as 2019 and almost identical to 2018 (50%). Of note, fewer (6%) reported that information about new rules is hard to obtain compared to 2019 (16%).

Exhibit H3 – G4A. What were some of the food safety topics you felt were difficult to get clear information on?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)	Non-retail only (n=187)	March 2019 (n=500)	Nov 2018 (n=370)
Labeling	7%	16%	12%	2%	4%	10%	9%	6%
New regulations/changes to rules	4%	7%	8%	6%	1%	6%	16%	10%
Food product (specified)	3%	11%	3%	N/A	2%	3%	6%	7%
Food storage (refrigeration, temperatures, etc.)	2%	N/A	2%	N/A	2%	N/A	N/A	N/A
Dietary restrictions (incl. allergens)	2%	N/A	4%	N/A	N/A	2%	3%	5%
Recalls	2%	N/A	N/A	6%	3%	2%	N/A	N/A
Information on food safety	2%	N/A	3%	6%	1%	3%	N/A	N/A
Licensing	2%	N/A	2%	6%	2%	4%	N/A	4%
Export information	2%	N/A	5%	N/A	1%	3%	1%	1%
Everything (general)	1%	N/A	1%	2%	N/A	1%	4%	2%
Preventive Control Program	1%	14%	1%	N/A	N/A	2%	N/A	N/A
Certification	1%	7%	1%	N/A	1%	2%	N/A	N/A
Import information	1%	N/A	3%	N/A	1%	3%	1%	2%
None in particular	58%	33%	39%	60%	72%	48%	48%	50%
DK/NR	9%	11%	9%	8%	9%	7%	7%	10%
Other mention	9%	14%	15%	3%	5%	13%	1%	4%

When businesses are looking for information, the most common source is the CFIA website (29%), followed by Internet or Google searches (24%). Of note, processors/manufacturers (45%) and wholesalers/distributors (47%) rely more heavily on the website than retailers, who tend to look more to their company website (30%).

Exhibit H4 – G4B. Where do you look, when looking for regulatory information?

	Total (n=400)	Agriculture (n=16)	Processor or manufacur er (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)
CFIA website	29%	27%	45%	47%	15%
Internet / Google	24%	14%	26%	15%	24%
Company website / head office	18%	4%	5%	6%	30%
Inspector	8%		11%	2%	8%
Government website (unspecified)	7%	11%	6%	5%	8%
Ministry of Agriculture, Fisheries and Food website	5%	7%	5%	4%	5%
Local health unit	5%	N/A	1%	N/A	7%
Website (unspecified)	4%	7%	6%	6%	2%
Food safety websites	3%	11%	1%	2%	4%
Health Canada website	3%	7%	2%	N/A	4%
Colleagues / Industry meetings	2%	N/A	1%	4%	2%
Phone call to CFIA	1%	4%	1%	7%	0%
Wholesaler / Manufacturer / Distributor	1%	N/A	1%	2%	1%
Other mention	6%	21%	8%	10%	2%
DK/NR	6%	N/A	4%	11%	8%

Very few (9%) follow the CFIA on social media. Those who do are more likely to follow on Facebook than any other platform. Those who offer an opinion as to what kind of content they would like to see on the CFIA’s website most often mention recalls (12%) and new and changing regulations (11%).

Qualitative insights: social media

- *When asked whether social media was an effective way to reach them, some indicated that they follow the CFIA on LinkedIn but that mostly they use it for getting contact information rather than reading out of interest. In keeping with the quantitative findings, few actually followed the CFIA on social media.*
- *Many explained that their industry associations would be a better way to reach them as they rely on them as a resource.*

Exhibit H5 – QSoc. Do you follow CFIA on any of the following social media platforms?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)
Facebook	5%	7%	8%	9%	3%
Twitter	2%	4%	2%	6%	1%
LinkedIn	2%	N/A	5%	N/A	N/A
Instagram	2%	N/A	2%	2%	1%
YouTube	1%	N/A	N/A	7%	N/A
None of the above	91%	89%	86%	81%	97%

Exhibit H6 – QSoc2. What kind of content do you prefer to see on CFIA social media channels?

	Total (n=400)	Agriculture (n=16)	Processor or manufacturer (n=134)	Wholesaler or distributor (n=37)	Retailer (n=212)
Recalls	12%	7%	10%	17%	13%
New or changing regulations	11%	14%	12%	13%	11%
Food safety	5%	N/A	4%	2%	6%
General information	2%	N/A	5%	4%	N/A
Other information	7%	5%	8%	14%	5%
Don't follow social media	11%	16%	10%	14%	11%
None/Nothing	30%	30%	29%	19%	33%
DK/NR	22%	28%	22%	18%	21%

Qualitative findings

Details about the qualitative methodology, sampling approach, and focus groups may be found in the Focus Group Methodology Report in Appendix B.

Section I: Views of the CFIA and the Safe Food for Canadians Regulations

The focus groups began with a general discussion about participants' impressions of and experiences with the CFIA. We also explored their awareness of and experiences with the SFCR. Some were much more aware of and have had more interactions with CFIA, typically food importers/exporters who have to deal with a broader range of regulations.

Overall impressions of the CFIA were generally favourable. One participant in Montreal explained that, "I have always had good dealings with CFIA. They're very polite, professional. I don't have any problems with them." Those who interacted with CFIA representatives largely echoed this sentiment, and described them as professional, responsive (as best they could be). When it came to the helpfulness of CFIA representatives, however, responses were more varied and there were differences of opinion. Some described having had varying experiences with different CFIA representatives (mostly inspectors); explaining that some were better than others (i.e., more understanding, more helpful, more collaborative, etc.). As one participant in Montreal stated, "I have noticed not all inspectors are the same. Some are helpful and try to help you find the answers. Others just tell you what to do but don't offer to help." In contrast, others had only positive feedback about their inspectors. One participant in Vancouver explained, "My experience with them has been really positive. My inspector is friendly. They help us understand and improve our process overall." Where everyone could agree was that more support and collaboration from the CFIA would go a long way in helping them improve their processes and compliance.

Despite the fact that many had heard of the SFCR, detailed knowledge was quite low. Those with limited knowledge questioned how these regulations fit with existing practices and standards they already had in place. Those with more knowledge felt that they were navigating the new regulations as best they could.

Provided with a brief description of the regulations (please refer to Appendix C), it appeared that there was a difference when considering the regulations from an aspirational vs. practical perspective. When asked what they thought of the new regulations overall, participants understood and agreed with the spirit of the regulations to ensure the safety of Canada's food system. In fact, participants were very passionate about this and their commitment to ensuring the safety of the product(s) they deliver. As one participant in Vancouver explained, "My overall reactions to the regulations are positive. They're necessary. No one wants contamination." However, many questioned the regulations in practice, especially as it relates to the requirement (and their ability) to ensure the same level of food safety controls for foods imported from outside Canada. A participant in Mississauga explained, "It's getting tough to bring stuff into Canada. You have to be careful. It's hard now too because even suppliers from other countries are skeptical." Another elaborated that the regulations, coupled with the relatively small size of Canada's market, could compound this challenge. They stated, "Exporters have to register to make sure it's ok to send product to Canada. Canada is a smaller market, so putting lots of regulations make it harder for us."

The overwhelming majority were definitely of the view that the regulations made it particularly difficult for small businesses. Participants argued that the regulations took a blanket approach which they believed was potentially redundant for big businesses, who they felt were likely organized to do these things already, but poses unique challenges for small businesses who do not have the revenues to fund the necessary infrastructure to meet all of

these requirements. As one participant explained in Montreal, “This has created a lot of paperwork. The cost is the biggest factor for us. We don’t have the means to do all this.” This lens, as we will see later, was also relevant with respect to their views on enforcement.

When asked to identify the most challenging element of the SFCR, most tended to cite meeting traceability requirements. Note that this finding is consistent with previous CFIA opinion research with food businesses. Traceability, participants argued, involved an inordinate amount of paperwork, knowledge, training, monitoring, etc. To meet this challenge, many spoke of having hired dedicated staff and/or outside consultants to manage this element specifically which not all could afford. Given these challenges, many participants complained about the cost (both financial as well as time) of implementing food safety controls. As one participant in Vancouver explained, “For me, it’s the cost. With everything for traceability – from scanners and inventory programs, to hygiene control, to ensure food is safe. Each step costs money.”

Second to traceability, licensing was also cited as a challenging element of the SFCR. For some, there appeared to be confusion about whether they required a licence. There also appeared to be confusion about how to acquire a licence and quickly, especially if they were in a hurry because of a deadline. Not surprisingly, these participants often complained about difficulties finding information on regulatory requirements and understanding the regulations. For instance, one participant in Montreal said, “Licensing was hard for us but especially difficult given the complexity of CFIA’s website. Even the inspectors didn’t know.” As noted later, the CFIA website was often raised spontaneously in an unfavourable light as an inadequate tool in this regard.

To wrap up the conversation about the CFIA and the new regulations, the topic of non-compliance was raised. While specific knowledge was limited, most had the sense that the CFIA relied on a number of enforcement activities ranging from warnings, fines, penalties, closures, etc. They also felt that the CFIA was well within their right to exercise these activities; although, they explained that their motivation to comply was generally out of a sense of responsibility and the reputation of their brand than it was in response to CFIA enforcement. The starting premise for most was that the severity of the infraction should dictate the enforcement activity. For example, participants felt that in the cases where public health and safety was at risk (i.e., not labelling a product correctly that may cause an allergic reaction), companies should be treated with the harshest of penalties. With that in mind, it was not surprising to see that reactions to the suggestion of publicizing the names of businesses that were non-compliant were mixed. Where the majority could agree was that businesses and specific circumstances needed to be treated on a case-by-case basis and within reason. Again, the overwhelming majority were comfortable with publishing the names of businesses that were found guilty of a very serious infraction that put the health and safety of Canadians at risk. However, most did not believe it would be fair to publish the names of businesses that were non-compliant on something less serious (i.e., not having a poster hung up on the wall, not using the right jar sizes, etc.). As one participant in Mississauga detailed, “There is a difference between a company doing something fraudulent vs. something improper. It’s very different than criminal activity. If company names are publicized for a minor infraction, the poor company can be destroyed. The penalty far outstrips the infraction.” Again, the preference was that infractions and penalties need to be handled on a case-by-case basis.

Section J: Reactions to CFIA’s website

Participants were then shown the main page of CFIA’s website and invited to peruse the site. Specific pages that were explored included the *Food Safety for Industry* and *Toolkit for businesses* pages. Most participants were familiar with the CFIA’s website, having accessed it in the past. In fact, many participants raised the website at the outset of the groups when describing their interactions with the CFIA. Most of these unprompted views were generally unfavourable and many felt that the website was difficult to navigate. Several mentioned that they had

come to rely on Google searches or bookmarking to find relevant information. One participant in Mississauga explained, “I never browse around their website or the main page. I usually just Google search the specific thing I’m looking for and it takes me right there. I don’t think the information is presented well on their site. I also tried their search and it’s impossible. It brings up all sorts of irrelevant information.” Another in Montreal also explained the process they have refined to help them locate information, “I have all of the pages I access bookmarked. Over time, and much trial and error, that is the only way I been able to get to the information I needed.” Overall, very few start at the main page and attempt to navigate the site.

A few participants mentioned having preferred some elements of the previous iteration of the website; mainly the menu with links to information categorized by food product type (i.e., meat, dairy, etc.). This was very much in line with their suggestion of better categorization of information, addressed later in this report.

When prompted to review the main page, participants tended to agree that most of the information they would be looking for (i.e., information about imports and exports; labelling; recalls; etc.) appeared to be included, but that because of the way it was organized, what they would be looking for was not immediately apparent. One participant in Mississauga noted that, “The way the information is presented on the main page is a bit scattered. They have various topics but it’s all over the map; and, the way it’s presented with little subtitles, means you have to read them all to know which one you want.” Reading all of the links to discern which might best fit with their information needs requires more time and energy than participants were willing to commit.

When asked where they would go for information about their food businesses, the links that were raised most often included: *Importing food, plants or animals; Exporting food, plants or animals; or, Food label requirements*. No one, across any of the groups, suggested they would click on the *Food Safety for Industry* link, which also meant that no one felt they would access the *Toolkit for Businesses* page. That being said, when prompted, most felt that the *Toolkit for Businesses* would be easy to navigate to find information on licensing; traceability; or, preventive control plans especially as the information was presented both visually in the clickable boxes and in list format below that. However, participants were hard pressed to identify where they would go for information about when the new requirements would apply to their businesses or for information about inspection and enforcement. Most tended to suggest the *More information* link in the list but worried that this would be a catch-all of information that would lead to more confusion.

Overall, when asked to provide suggestions for improvements to the website, participants prioritized separating information for consumers and industry. Further to that advice, on the industry page, participants suggested categorizing the information either by industry type (i.e., importer/exporter, manufacturer, etc.) or food product type (i.e., meat, dairy, etc.). Participants also indicated that a live chat or dedicated phone number to speak to someone expressly for support navigating the website would be a welcome change. Finally, they requested significant improvement to the internal search function.

Section K: Reactions to advertising concepts

The last part of the focus group discussions explored reactions to a variety of draft advertising concepts. Participants were shown three concepts that were designed for distribution via social media. In each group, the We’re Ready concept was shown first; followed by two variations of the New Rules for Food Businesses concept, in randomized order. Please refer to Appendix F to view the concepts.

Reactions to the We're Ready concept were mostly negative. Most were generally confused about the main message and purpose of the ad. Most interpreted the main message as, "We're ready for an inspection". However, the image did not infer they were ready. One participant in Mississauga pointed out that the facility and workers in the concept did not appear to be obeying proper hygiene practices, stating "The photo is terrible from an industry standpoint. This does not look like a professional facility. The food is unwrapped. She is wearing earrings. He has an uncovered beard." Very few felt this concept was directed at them; and, therefore, would not notice it in their social media feeds or be motivated to do anything if they did.

Reactions to the New Rules for Food Businesses concept was generally much more favourable. The message seemed clearer and the visuals were more appropriate. According to one participant in Vancouver, "It's straight forward. You know it's for the Government of Canada. This is a restaurant that is following the rules. They have standards." Participants felt the main message was obvious in both executions: that there were new rules in place and that food businesses should learn more about whether they meet the requirements. Further, many participants indicated they would notice these concepts and thought they would share them with their staff/teams and/or clients, specifically.

Participants definitely had the sense that the tone of both executions was quite different: one was more serious and pointed; the other was a friendly reminder. With respect to the former, reactions to the tone of the concept depicting an inspector's jacket, tended to be polarized. Some appreciated the gravity that was implied, explaining, "This one is also about new rules but it's a little more severe. The tone of this one suggests you need to conform." Others found it menacing and in contradiction with either their experience with inspectors or the experience they would like to have with inspectors (which they described as collaborative and supportive). For example, one participant felt it may even deter people from starting a business because it is "scary". To improve this concept, the majority did feel it would be just as effective if it was more obviously about food inspection (and less about police or border control). Participants suggested depicting an inspector meeting with a client in a real setting. The inspector could be dressed in protective gear, with a tablet in hand, and hopefully with a friendly look on their face (i.e. smiling, in conversation with the client, etc.).

With respect to the latter, friendlier execution of the New Rules for Food Businesses concept, reactions to the tone tended to be overwhelmingly positive. It was described as inviting, welcoming and friendly. While some felt that they may overlook it for this reason, it was certainly less polarizing.

Incidentally, when asked whether social media was an effective way to reach them, some indicated that they follow the CFIA on LinkedIn but that mostly they use it for getting contact information rather than reading out of interest. Participants did not seem to think social media was the best way to reach them. Those who felt there may be more effective ways of reaching them, usually cited their industry associations as resources they typically relied on.

Conclusions

Impressions of the CFIA remain fairly positive, with the exception of a few sensitive areas, namely the website. Overall, respondents to the survey and participants in the focus groups had favourable impressions of the organization. CFIA inspections are viewed as fair and generally logical. Over half agree they are conducted in a consistent manner. Almost three-quarters agree that guidance is easy to understand. However, given that the website is the way businesses most frequently interact with the CFIA, the frustrations expressed in the focus groups with the website have the potential to negatively impact businesses' views of the organization. Participants found the site poorly organized and difficult to find the information they needed. At the same time, the feedback received presents an opportunity for the CFIA to build a better relationship with businesses by ensuring the tools on the site are intuitive for those using them. Participants recommended separating information for consumers and industry and on the industry page, categorizing the information either by industry sector (i.e., importer/exporter, manufacturer, etc.) or food product type (i.e., meat, dairy, etc.). Participants also indicated that a live chat or dedicated phone number to speak to someone expressly for support navigating the website would be a welcome change, along with significant improvement to the internal search function.

Businesses' awareness of the SFCR appears to have grown over the past two years. Well over half of businesses surveyed believe the regulations apply to them. When asked generally, the vast majority of businesses report that they understand the regulations that apply to them very clearly. However, familiarity and understanding of the details of the SFCR is somewhat less widespread and varies by business size and sector. Retailers are overall less familiar than other businesses. Small and micro businesses are much more likely to say they are not aware of SFCR requirements compared to medium and large businesses. Future education efforts should target these groups. Specifically, the CFIA may have to address concerns alluded to in the qualitative portion regarding the burden, both in terms of time and cost, small businesses perceived the SFCR will have or already are having on them.

The results of the qualitative research highlighted that future communication to businesses should reflect the standards the CFIA itself sets for food safety (e.g. ensure details such as the way individuals in the ad are dressed and the space around them is set up matches CFIA regulations). The concept that elicited more positive responses, New Rules for Food Businesses, was perceived to be very clear and directed at businesses. Participants understood the message easily. Anything that can be done to show that the concept is related to food inspection would draw their attention. Both the quantitative and qualitative research demonstrated that few follow the CFIA on social media, which the Agency should consider when deciding how best to reach businesses.

Appendix A: Survey methodology report

Survey methodology

Earnscliffe Strategy Group’s overall approach for this study was to conduct a telephone survey of 400 individuals own a food business or work at one in a role such as food safety manager or quality control. A detailed discussion of the approach used to complete this research is presented below.

Questionnaire design

The questionnaire for this study was designed by the CFIA in collaboration with Earnscliffe and provided for fielding to Leger. The survey was offered to respondents in both English and French and completed based on their preferences.

Sample design and selection

The sampling plan for the study was designed by Earnscliffe in collaboration with the CFIA. Leger used sample provided by InfoCanada, which has been used in the past for CFIA projects.

The final data were weighted to the proportion of businesses that fall into each NAICS code and province as per InfoCanada information.

Data collection

The survey was conducted in English and in French, based on the respondent’s preference, from January 27 to February 12, 2020. The survey was undertaken by Leger’s telephone data collection operation headquartered in Montréal, Québec.

Targets/weighting

Quotas were set to ensure the sample included the desired proportion of micro/small and medium/large businesses:

Micro and small businesses	300
Medium & large businesses	100
TOTAL	400

Business size was defined as follows:

- Micro: 1 to 4 employees
- Small: 5-99 employees
- Medium: 100-499 employees
- Large: 500+ employees

The final data were weighted to the proportion of businesses that fall into each NAICS code and province as per InfoCanada information.

The tables below list the NAICS codes used for sampling and the proportion of the sample that is constituted by each code on the InfoCanada list, as well as the proportion of the sample by province:

Description	NAICS	Total on list (%)		NAICS	Total on list (%)
Potato Farming	11121101	0.44%	Cookie & Cracker Manufacturing	31182101	0.02%
Other Vegetable (Except Potato) & Melon Farming	11121901	0.17%	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour	31182403	0.01%
Mushroom Production	11141101	0.54%	Dry Pasta Dough/Flour Mixes Mfg-Purchased Flour	31182404	1.01%
Other Food Crops Grown Under Cover	11141902	0.03%	Roasted Nuts & Peanut Butter Manufacturing	31191102	0.08%
Flour Milling	31121102	0.44%	Other Snack Food Manufacturing	31191901	0.57%
Flour Milling	31121106	0.16%	Other Snack Food Manufacturing	31191903	0.03%
Flour Milling	31121107	0.07%	Other Snack Food Manufacturing	31191905	0.16%
Malt Manufacturing	31121302	0.01%	Coffee & Tea Manufacturing	31192001	1.19%
Soybean & Other Oilseed Processing	31122402	0.02%	Coffee & Tea Manufacturing	31192002	0.14%
Fats & Oils Refining & Blending	31122505	0.02%	Breweries	31212001	0.06%
Fats & Oils Refining & Blending	31122510	0.02%	Breweries	31212002	3.73%
Fats & Oils Refining & Blending	31122511	0.11%	Breweries	31212003	0.01%
Fats & Oils Refining & Blending	31122516	0.04%	Wineries	31213001	5.25%
Breakfast Cereal Manufacturing	31123001	0.03%	Wineries	31213002	0.02%
Cane Sugar Manufacturing	31131403	0.12%	Distilleries	31214001	0.56%
NonChocolate Confectionery Mfg	31134001	0.04%	Meat Markets	44521001	0.09%
Chocolate/Confectionery Mfg From Cacao Beans	31135101	1.58%	Meat Markets	44521003	0.03%
Confectionery Mfg From Purchased Chocolate	31135201	0.55%	Meat Markets	44521004	0.04%
Ice Cream & Frozen Dessert Manufacturing	31152001	0.36%	Meat Markets	44521006	8.66%
Animal (Except Poultry) Slaughtering	31161101	0.43%	Meat Markets	44521009	0.46%
Animal (Except Poultry) Slaughtering	31161102	2.71%	Meat Markets	44521010	0.53%
Animal (Except Poultry) Slaughtering	31161103	3.07%	Meat Markets	44521012	0.02%
Poultry Processing	31161501	0.74%	Fish & Seafood Markets	44522003	0.27%

Description	NAICS	Total on list (%)		NAICS	Total on list (%)
Seafood Product Preparation & Packaging	31171001	0.02%	Fish & Seafood Markets	44522004	3.99%
Seafood Product Preparation & Packaging	31171003	1.99%	Fruit & Vegetable Markets	44523001	0.96%
Seafood Product Preparation & Packaging	31171004	0.09%	Fruit & Vegetable Markets	44523003	14.00%
Seafood Product Preparation & Packaging	31171007	0.02%	Fruit & Vegetable Markets	44523005	1.62%
Seafood Product Preparation & Packaging	31171008	2.06%	Fruit & Vegetable Markets	44523006	0.02%
Retail Bakeries	31181101	0.03%	Baked Goods Stores	44529102	0.01%
Retail Bakeries	31181102	30.16%	Confectionery & Nut Stores	44529201	0.27%
Retail Bakeries	31181103	0.03%	Confectionery & Nut Stores	44529202	5.35%
Retail Bakeries	31181104	0.07%	Confectionery & Nut Stores	44529204	0.15%
Commercial Bakeries	31181202	3.42%	Confectionery & Nut Stores	44529205	0.46%
			Confectionery & Nut Stores	44529206	0.66%

Province	Total on list (%)
Quebec	19%
Ontario	34%
Manitoba	3%
Saskatchewan	3%
British Columbia	20%
Alberta	11%
Newfoundland	2%
New Brunswick	3%
Nova Scotia	4%
PEI	1%
Territories	0%

Quality controls

Leger’s data collection quality control process is concretely based on the following elements:

- Assigning every project a project leader who is ultimately responsible for the quality of the final product, thereby strengthening the sense of internal responsibility;

- Ensuring that the client’s objectives precisely correlate with the final questionnaire, strictly ensuring that all targeted dimensions are unequivocally included in the guide;
- Individually examining the formulation of every question beforehand to ensure simplicity of expression, clear syntax and a precise notion of the field covered;
- Looking for contamination effects beforehand, that is ensuring that the location of a question in the questionnaire does not have an undue effect on the following answers (this is generally done by providing information indirectly to the participants, thereby rendering the sampling unrepresentative);
- A strict comparison of the computerised version of the questionnaire with the reference questionnaire approved by the client;
- Checking the programmed jumps in the computerised system before the pre-test;
- Holding a pre-test to ensure the questions are easily understood, to check the concepts, and to look for any possible ambiguities or logical jumps in the questions, etc. The pre-test is preferably held in the presence of the client (audio monitoring) and interviewers are debriefed afterwards so all dimensions can be explored;
- Using the best interviewers, from our Elite network, for the pre-test, since their thousands of hours of field experience enable them to quickly discern any questions that are badly written, ambiguous, unclear or too general. No one is better suited to detect anomalies at this stage where they can still be easily corrected;
- In-depth training of interviewers so they understand the context of every study and the meaning of every question;
- Insistence on open or semi-open questions, in order to specify the type of answer expected and to avoid vague and general answers as much as possible;
- Heavy monitoring by the supervisors to facilitate the detection of any problematic questions. This involves being attentive to the interviewers’ thoughts and concerns and encouraging them to voice them, even after the pre-test;
- Constant audio monitoring of the survey, along with simultaneous monitoring of the information entered into the computer. This allows the supervisor to control the quality of the interview and the correct correlation between the information supplied and the codes entered;
- Using software that does not allow input errors or unexpected jumps, etc. The logical validation is therefore carried out beforehand and not after the fact;
- Constant rigour throughout the process, but particularly at the beginning insofar as the comprehensibility of the questions is concerned. Even if the pre-test has already taken place, the complexity and length of the questionnaires means that some questions might have to be modified to ensure they are more easily understood (without modifying the sense). These modifications are always carried out in complete agreement with the client;
- Open questions are coded according to an initial sampling of answers in the file and by the creation of codes that are submitted to the client for approval;
- The interviewers’ performance is monitored on a daily basis using the Command Center software which enables corrections to be carried out quickly.

Results

Final dispositions

	B2B
Total Numbers Attempted	9,590
Invalid	3
NIS, fax/modem, business/non-res.	295
Unresolved (U)	5174
Busy	104
No answer, answering machine	5070
In-scope - Non-responding (IS)	3245
Household refusal	N/A
Respondent refusal	489
Language problem	42
Illness, incapable	N/A
Selected respondent not available	2603
Qualified respondent break-off	111
In-scope - Responding units (R)	873
Language disqualify	473
No one 18+	
Other disqualify	
Completed interviews	400
Response Rate = R/(U+IS+R)	9.4%

Nonresponse

Any survey that is conducted is potentially subject to bias or error. The possibility of non-response bias exists within the current sample. In particular, this survey would not include members of the population who do not have access to a telephone or who are not capable of responding to a survey in either English or French.

Sample profile

Region	Unweighted Sample	Weighted Sample
Atlantic	75	68
Quebec	225	234
Ontario	386	386
Manitoba/Saskatchewan	71	66
Alberta	111	113
British Columbia/Territories	135	135

Business Sector	Unweighted Sample	Weighted Sample
Agriculture	16	17
Processor/Manufacturer	134	138
Wholesaler/Distributor	37	36
Retailer	212	208
Other	1	2

Business Activities	Unweighted Sample	Weighted Sample
Import food products	100	99
Export food products or prepare food for export	74	76
Prepare, process, treat, manufacture or preserve food for export or to be sent across prov/terr borders	72	77
Grade, label, or package food for export or to be sent across prov/terr borders	58	62
Grow fruit, vegetables or grains for export or to be sent across prov/terr borders	9	9
Send or convey food products across prov/terr borders (wholesaler/distributor)	67	74
Sell food products at retail directly to consumers	342	337
Produce organic food	39	43

Business Size	Unweighted Sample	Weighted Sample
1 (Self-employed)	12	10
2-4 employees	56	60
5-10 employees	97	97
11-99 employees	143	146
100-499 employees	77	73
500+ employees	15	14

Gross annual revenue	Unweighted Sample	Weighted Sample
\$30,000 or less	12	11
\$30,000 to less than \$100,000	30	31
\$100,000 to less than \$500,000	63	65
\$500,000 to less than \$1 million	45	47
\$1 million to less than \$5 million	74	70
\$5 million or more	83	75

Statistical significance testing

Bolded results presented in this report indicate that the difference between some business sectors (agriculture, processor/manufacturer, wholesaler/distributor and retailer) analysed are significantly higher than results found

for other businesses. Unless otherwise noted, differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test. Due to rounding, results may not add to 100%.

Margin of error

The margin of error for this sample of 400 Canadian food businesses is +/-4.81%

Survey duration

The online survey took an average of 17 minutes to complete.

Appendix B: Focus group methodology report

Methodology

The research program included a series of six (6) qualitative discussions in three urban centres where the food industry is predominantly located across Canada: Vancouver (February 18); Mississauga (February 19); and Montreal (February 20). In each location, focus groups were conducted with a mix of senior decision makers in micro (1 to 4 employees) and small (5 to 99 employees) food businesses, food importers and exporters. The sessions were approximately 1.5 hours in length.

Schedule and composition of the focus groups

City	Group	Number of Participants	Date/Time
Vancouver, BC	Group 1	5	Tuesday, February 18, 5:30 pm
	Group 2	6	Tuesday, February 18, 7:00 pm
Mississauga, ON	Group 1	3	Wednesday, February 19, 5:30pm
	Group 2	5	Wednesday, February 19, 7:00pm
Montreal, QC	Group 1	4	Thursday, February 20, 5:30pm
	Group 2	6	Thursday February 20, 7:00pm

Recruitment

Participants were recruited using a screening questionnaire (included in Appendix D).

The screener contained a series of screening questions to ensure participants qualified based on their company size, role in their company, and that all groups contained at least two importers and no more than one retail-only participant.

Our fieldwork subcontractor, Quality Response, relied on panels and databases of Canadians. This is the approach employed most often. Quality Response reaches out to members of their database first via email and follows-up with telephone calls to pre-qualify respondents. We also included a re-screening service in which focus group participants were re-screened onsite upon arrival at the focus group facility to ensure the utmost quality of participants.

Quality Response's database includes approximately 35,000 Canadians with profiling on a range of attributes including standard personal demographics, household composition, medical background, technology usage, financial services, health and wellness, business profiles, and other relevant criteria. Their database is constantly being updated and replenished and operates out of their own, onsite telephone room in Toronto, Ontario. Potential group participants are recruited to their database via mixed-mode: following a proprietary telephone survey, online, referral, social media and print advertising. Initial contact is often made via email or online pre-screening for speed and economies, followed up by personal telephone recruitment and pre-group attendance confirmation.

Quality Response understands the nuances of qualitative recruiting and the importance of locating qualified, interested respondents. Their recruiting is undertaken in strict accordance with the Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research.

Reminder calls were made prior to the groups to confirm participants' intention to attend and to encourage higher rates of participation. As well, all participants received a cash honorarium of \$250 at the end of the group discussion. This amount is consistent with honorariums for groups of this duration being conducted in major urban centres and is in line with the amount proposed to the federal government for this contract.

A total of 6 participants were recruited for each group. Upon arrival at the focus group facility, all participants were required to provide photo identification to ensure they were the individual who had been recruited for that particular focus group. As mentioned earlier, every participant was re-screened upon arrival to ensure they met the screening qualifications, were capable of communicating in the appropriate language of the group, and capable of contributing to the discussion in constructive ways. We have found that this added verification ensures better quality discussions.

All participants signed a document, prior to conducting the groups, acknowledging their consent to be recorded, for the purposes of review and analysis in preparation of this report. All groups were digitally recorded, and live online webstreaming was made available for observers to view the groups remotely.

Moderation

We relied on one qualified moderator. Our moderator is fully bilingual and was able to conduct the groups in both French and English, ensuring continuity across all cities.

A note about interpreting qualitative research results

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

Appendix C: Discussion guide

Introduction 10 min (10 min)

Moderator introduces herself/himself and her/his role: role of moderator is to ask questions, make sure everyone has a chance to express themselves, keep track of the time, be objective/no special interest.

- The name of the firm the moderator works for, and the type of firm that employs them (i.e. an independent marketing research firm)
 - Role of participants: speak openly and frankly about opinions, remember that there are no right or wrong answers and no need to agree with each other.
 - Results are confidential and reported all together/individuals are not identified.
 - Your participation is voluntary; you can leave the discussion at any point. We have not shared with our client any information that would identify you personally or your company.
 - The presence and purpose (reporting) of any recording being made of the session.
 - The presence of any observers, their role and purpose, and the means of observation (one-way mirror, teleconference/webstreaming; colleagues viewing in the back room and listening in remotely).
 - The length of the session (1.5 hours).
 - Turn off cell phones for the duration of the discussion.
-
- Moderator to explain the research purpose and disclose the research sponsor, described, at a minimum. These groups are being conducted on behalf of the Canadian Food Inspection Agency, commonly referred to as CFIA. We are exploring your awareness and use of CFIA's products and services and whether CFIA's products and services meet your needs.

Moderator will go around the table and ask participants to introduce themselves. Please tell us a bit about who you are and the type of business you manage.

Awareness

20 min (30 min)

To start off, I would like to understand your level of awareness of and interaction with the Canadian Food Inspection Agency, or CFIA.

- What do you know about the CFIA?
- How much interaction have you had with the CFIA?
FOR THOSE WHO HAVE HAD INTERACTIONS WITH CFIA:
 - What were your overall impressions of your dealings with the CFIA?
 - Were they professional? Responsive? Thorough? Why or why not?
- [HANDS UP] Has anyone read, heard or seen anything about the Safe Food for Canadians Regulations, which came into effect on January 15, 2019?
- To the best of your knowledge, what is the aim of the Safe Food for Canadians Regulations?
- How have/do these regulations impacted/impact your business? Why do you say that?

IF SOME PARTICIPANTS UNAWARE OF REGULATIONS:

So that we are all on the same page, the Safe Food for Canadians Regulations aim to make the Canadian food system safer by focusing on prevention and allowing for faster removal of unsafe food from the marketplace. The regulations also require imported food to be prepared with the same level of food safety controls as food prepared in Canada.

- Based on this description, what is your overall impression of these regulations? Why do you say that?
- Do these regulations give you more confidence in the safety of Canada's food system? Why or why not?

The Safe Food for Canadians Regulations have three key elements for food businesses. They are: 1. Traceability; 2. Preventive Control Plans; and, 3. Licensing.

- How familiar are you with these elements?
- Which elements are the most challenging to you as a food business? Why?
- What else would you see as significant challenges to implementing food safety controls? Why?
- Which of the following would you consider to be the major challenge to implementing food safety controls?
 - Cost
 - Finding information on regulatory requirements
 - Understanding the regulations
 - Access to training materials/courses
 - Something else entirely

When a company is not compliant with the Safe Food for Canadians Regulations there is a continuum of enforcement activities available to CFIA.

- What do you think happens to companies that do not follow the regulations? Why do you think that?
 - Do you feel this treatment is appropriate or not? Probe: Too lenient, too harsh?
- Do you think the names of companies that do not follow the rules should be published on a public website? Why or why not?
- Do you have any other thoughts on things that could help ensure or support your compliance with food safety regulations?

Website Usability

25 min (55 min)

I would like to spend the next little bit looking at the CFIA's website. To do so, I would like to have everyone look at the screen and we will navigate through their site together.

- Starting from the main page, inspection.gc.ca, where would you go to find information for your food business? Why?
- Is this what you were expecting to find?
- Would anyone go anywhere else?

[ONCE ON THE FOOD SAFETY FOR INDUSTRY PAGE]

- What do you think of this page? Why?
- Does it seem to have the information you would be looking for?
- Is it well organized? Does it seem easy to use? Why or why not?
- What would you be most interested in or likely to click on this page? Why?

- Does anything appear to be missing?

MODERATOR TO THEN GO TO THE TOOLKIT FOR BUSINESS LINK: <https://inspection.gc.ca/food-safety-for-industry/toolkit-for-food-businesses/eng/1427299500843/1427299800380>

- What are your overall impressions of this page? Why?
- Thinking about your business...
 - If you needed a licence, where would you go to apply for one? Why?
 - Where would you go to find out when the new requirements apply to your business sector? Why?
 - Where would you go to find information on developing a preventive control plan for importers, or for domestics only? Why?
 - Where would you go to find information on inspection and enforcement? Why?
 - What if you had a question for the CFIA, where would you go? Why?
 - Would you use phone or email to contact the CFIA? Why?
- Now that you are more familiar with this page, was it well organized? Easy to use? Intuitive? Why or why not?
- Do you have any suggestions for how this page could be improved? Why?

Advertising Testing

30 min (85 min)

For the remainder of our discussion I would like to look at some advertisements that the CFIA has developed and I would like to get your feedback on them. We will be reviewing ads that you might see in social media.

[MODERATOR TO SHOW ARE YOU READY AD FIRST, FOLLOWED BY NEW RULES FOR FOOD BUSINESSES ADS. ADS WILL BE DISPLAYED ON SCREEN AND PARTICIPANTS WILL ALSO RECEIVE PAPER COPIES OF EACH. THE ORDER OF THE TWO NEW RULES FOR FOOD BUSINESSES ADS WILL BE ROTATED.]

MODERATOR TO PROBE FOR EACH AD:

- Overall, what did you think of this concept? Why do you say that?
- What did this concept say to you? What was the key message(s) or idea(s) conveyed by the concept? Why do you say that?
- Was it credible/believable? Why or why not?
- Would you notice these ads in your social media feed? Would they capture your attention? Why or why not?
 - What stands out most? Why do you say that?
 - If you did receive one of these in your social media feed, would you share it with your contacts? Why or why not?
- If you saw one of these ads, would it motivate you to take action? Why or why not?
 - What type of actions? Probe: talk to someone, look for more information, share it, etc.?
- What did you think of the approach (intent) taken in this ad? Was it appropriate? Why or why not?
- Which of the four did you prefer? Why?
- What, if anything, would you change to improve this concept? Why do you say that?
- What did you take away about the federal requirements under the Safe Food for Canadians Regulations?
 - What did you think of the specific messaging that was introduced?
 - Was this information new to you?

- Was it of interest to you? Why or why not?
- Does the message fit with each of the graphics? Why or why not?
 - Are some better than others? If yes, which ones? Why?

Conclusion

5 min (90 min)

MODERATOR TO CHECK IN THE BACK ROOM AND PROBE ON ANY ADDITIONAL AREAS OF INTEREST.

- This concludes what we needed to cover tonight. Does anybody have any final comments on the issues we discussed?
- We really appreciate you taking the time to come down here to share your views. Your input is very important.
- Reminder to those in the first/second group about reserving comments so as not to influence those waiting at reception for the next group.

Appendix D: Recruitment screener

FOCUS GROUP SUMMARY

- Recruit 6 for 5 to 6 to show
- A minimum of 2 participants in each group must be food importers (S5)
- All are micro (1-4 employees) or small (5-99 employees) businesses (S6)
- No medium (100-499 employees) or large (500+ employees) businesses in any groups (S6)

VANCOUVER Tuesday, February 18, 2020

GROUP 1	5:30 pm
GROUP 2	7:00 pm

MISSISSAUGA Wednesday, February 19, 2020

GROUP 1	5:30 pm
GROUP 2	7:00 pm

MONTREAL Thursday, February 20, 2020

GROUP 1	5:30 pm
GROUP 2	7:00 pm

Respondent's name:	Interviewer:
Respondent's phone number:	Date:
Respondent's phone number:	Validated:
Respondent's email:	On quotas:

Hello/Bonjour, my name is _____. I am calling on behalf of the Earncliffe Strategy Group, a national public opinion research firm. Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

From time to time, we solicit opinions by talking with people. We are preparing to conduct a series of focus groups on behalf of the Government of Canada, more specifically the Canadian Food Inspection Agency (CFIA), and I would like 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. 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. 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. Are you the right person to speak with?

- Yes CONTINUE
- No ASK TO BE DIRECTED TO THE CORRECT PERSON. REPEAT FROM BEGINNING IF TRANSFERRED.

S3. Do you have primary responsibility for the food safety of the food products that your business sells or produces?

- | | | |
|-----|---|---------------------|
| Yes | 1 | CONTINUE |
| No | 2 | THANK AND TERMINATE |

S4. Which of the following categories best describes your business? **[READ LIST, ENSURE GOOD MIX]**

- | | |
|---------------------------|---|
| Agriculture | 1 |
| Processor or manufacturer | 2 |
| Wholesaler or distributor | 3 |
| Retailer | 4 |
| Other (please specify) | 5 |

S4A. Please specify the predominant food category(ies) your business specializes in. [RECORD]

S5. Which of the following activities apply to your business? **[READ LIST, NOTE ALL THAT APPLY]**

**ENSURE GOOD MIX WITH THE FOLLOWING QUOTAS:
 MINIMUM OF 2 IMPORTERS (S5 = 1) PER GROUP.
 NO MORE THAN ONE RETAIL ONLY (S5 = ONLY 7) PER GROUP.**

- | | |
|---|---|
| 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 |

IF "NONE OF THE ABOVE" (S5 = 9), THANK AND TERMINATE.

S6. 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]

1-4 (Micro)	1	
5-99 (Small)	2	
100-499 (Medium)	3	THANK AND TERMINATE
500+ (Large)	3	THANK AND TERMINATE
DK/NR	9	THANK AND TERMINATE

S7. 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.

\$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	
DK/NR	9	THANK AND TERMINATE

S8. What is your gender? [PLEASE RECORD]

S9. Have you participated in a discussion or focus group before? A discussion group brings together a few people in order to know their opinion about a given subject.

Yes	1	MAX 1/3 PER GROUP
No	2	SKIP TO S13
DK/NR	9	THANK AND TERMINATE

S10. When was the last time you attended a discussion or focus group?

If within the last 6 months	1	THANK AND TERMINATE
If not within the last 6 months	2	CONTINUE
DK/NR	9	THANK AND TERMINATE

S11. How many of these sessions have you attended in the last five years?

If 4 or less	1	CONTINUE
If 5 or more	2	THANK AND TERMINATE
DK/NR	9	THANK AND TERMINATE

S12. And what was/were the main topic(s) of discussion in those groups?

IF RELATED TO FOOD REGULATIONS OR FOOD SAFETY, THANK AND TERMINATE.

S13. Participants in discussion groups are asked to voice their opinions and thoughts. How comfortable are you in voicing your opinions in front of others? Are you... (READ LIST)

Very comfortable	1	MINIMUM 4 PER GROUP
Somewhat comfortable	2	CONTINUE
Not very comfortable	3	THANK AND TERMINATE
Not at all comfortable	4	THANK AND TERMINATE
DK/NR	9	THANK AND TERMINATE

S14. Sometimes participants are asked to read text and/or review images during the discussion. Is there any reason why you could not participate?

Yes	1	THANK AND TERMINATE
No	2	CONTINUE
DK/NR	9	THANK AND TERMINATE

S15. The discussion group will take place on [INSERT DATE @ TIME] for up to 90 minutes and participants will receive \$250 for their time. Would you be willing to attend?

Yes	1	RECRUIT
No	2	THANK AND TERMINATE
DK/NR	9	THANK AND TERMINATE

PRIVACY QUESTIONS

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

P1) First, we will be providing the hosting facility and session moderator with a list of respondents' names and profiles (screener responses) so that they can sign you into the group. This information will not be shared with the Government of Canada department organizing this research. Do we have your permission to do this? I assure you it will be kept strictly confidential.

Yes	1	GO TO P2
No	2	GO TO P1A

We need to provide the facility hosting the session and the moderator with the names and background of the people attending the focus group because only the individuals invited are allowed in the session and the facility and moderator must have this information for verification purposes. Please be assured that this information will be kept strictly confidential. GO TO P1A

P1a) Now that I've explained this, do I have your permission to provide your name and profile to the facility?

Yes	1	GO TO P2
No	2	THANK & TERMINATE

P2) A digital recording of the group session will be produced for research purposes. This recording will be used only by the research professional to assist in preparing a report on the research findings and will be destroyed once the report is completed.

Do you agree to be digitally recorded for research purposes only?

Yes	1	THANK & GO TO P3
No	2	READ RESPONDENT INFO BELOW & GO TO P2A

It is necessary for the research process for us to record the session as the researcher needs this material to complete the report.

P2a) Now that I've explained this, do I have your permission for digital recording?

Yes	1	THANK & GO TO P3
No	2	THANK & TERMINATE

P3) Employees from the CFIA and/or the Government of Canada may be onsite to observe the groups in-person from behind a one-way mirror. These would be employees in Communications; no employees from policy, operations or inspections would be in attendance.

Do you agree to be observed by Government of Canada employees?

Yes	1	THANK & GO TO INVITATION
No	2	GO TO P3A

P3a) It is standard qualitative procedure to invite clients, in this case, Government of Canada employees, to observe the groups in person and/or online. They will be seated in a separate room and observe from behind a one-way mirror or will stream the session live online. They will be there simply to hear your opinions first hand although they may take their own notes and confer with the moderator on occasion to discuss whether there are any additional questions to ask the group.

Do you agree to be observed by Government of Canada employees?

Yes	1	THANK & GO TO INVITATION
No	2	THANK & TERMINATE

INVITATION:

Wonderful, you qualify to participate in one of our discussion sessions. As I mentioned earlier, the group discussion will take place on [INSERT DATE AND TIME] for up to 90 minutes.

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at: [PROVIDE FACILITY NAME AND ADDRESS].

VANCOUVER Tuesday, February 18, 2020	Honorarium: \$250
Vancouver Focus	5:30 pm
503-1080 Howe Street	7:00 pm
Vancouver, BC V6Z 2T1	
604.682.4292	
MISSISSAUGA Wednesday, February 19, 2020	Honorarium: \$250
InfoQuest	5:30 pm
6655 Kitimat Rd	7:00 pm
Mississauga, ON L5N 6J4	
905.567.9009	
MONTREAL Thursday, February 20, 2020	Honorarium: \$250
Adhoc Recherche	5:30 pm
400 Boulevard de Maisonneuve O #1200	7:00 pm
Montreal, QC H3A 1L4	
514.937.4040	

We ask that you arrive fifteen minutes early to be sure you find parking, locate the facility and have time to check-in with the hosts. The hosts may be checking respondents’ identification prior to the group, so please be sure to bring some personal identification with you (for example, a health card, a student card, or a driver’s licence). If you require glasses for reading, make sure you bring them with you as well.

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to attend, please call us so that we may get someone to replace you. You can reach us at **[INSERT PHONE NUMBER]** at our office. Please ask for **[NAME]**. Someone will call you in the days leading up to the discussion to remind you.

So that we can call you to remind you about the discussion group or contact you should there be any changes, can you please confirm your name and contact information for me?

First name

Last Name

Email

Daytime phone number

Evening phone number

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

Appendix E: Survey instrument

[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 Earncliffe Strategy Group *[Leger Marketing in Quebec]*, the company hired to do the survey.

The survey will take approximately 15 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

S1B. ***[RECORD from sample - not asked]***
Language of interview

S1C. *[Record Gender]*

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

Agriculture	1 [2 digit NAICS 11]
Processor or Manufacturer	2 [2 digit NAICS 31 – ask S3B]
Wholesaler or distributor	3 [2 digit NAICS 42]
Retailer	4 [2 digit NAICS 44]
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

S3A1. Do you prepare, process, treat, manufacture or preserve food to be sold only within your province or territory?

Yes	1
No	2
Don't know	3

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

[IF BUSINESS IS RELATED TO FOOD BUSINESS RECODE S3 AND CONTINUE, OTHERWISE THANK AND TERMINATE – keep data for quality control]

[FLAG AS “RETAIL ONLY” IF ONLY SELECTED “7” AT S3]

S3B. **[If S2 = 2]** Does the main product of your business include confectionary items, snack foods, beverages, oils, dried herbs and spices, nuts and seeds, coffee and tea, or processed grain-based foods such as baked goods, cereals and pasta.

Yes	1
No	2
Not Sure	9

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 seen, read or heard anything about the Safe Food for Canadians Regulations?

Yes	1
No	2
Not sure	3

B2A. **[IF S4A=YES]** Where did you hear, see or read about the regulations? [OPEN END]

Don't know / Refused 99

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

Yes	1
No	2
Not Sure	9

S4C. **[If FFV, S3=5]** Did you know that new requirements of the Safe Food for Canada Regulations come [came] into force for the Fresh Fruit and Vegetable sector on January 15?

Yes	1
No	2
Not Sure	9

Interviewer note if asked [You can learn more at inspection.gc.ca]

S4D1. **[If manufactured food sector, S3B=Yes, 1]** Do you think that Manufactured Food Sector is a good description for the sector your businesses is in?

Yes	1
No	2
Not Sure	9

S4D. Did you know that new requirements for this sector come into force on July 15, 2020?

Yes	1
No	2
Not Sure	9

[Interviewer note if asked: (You can learn more at inspection.gc.ca)]

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 <i>[DO NOT READ]</i>	8 <i>[TERMINATE]</i>
Refused <i>[DO NOT READ]</i>	9 <i>[TERMINATE]</i>

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 <i>[DO NOT READ]</i>	8
Refused <i>[DO NOT READ]</i>	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

[Review idea of quota for Retail Only]

Food Safety Activities

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
- Regularly sends staff on food safety training 7
- Has an internal training program on food safety 8
- Uses technology such as blockchain or similar digital systems to assist food safety 9
- None of the above 99

A31. Whether or not you participate in a private certification scheme, do you support their role in achieving compliance with food safety regulations?

Yes	1
No	2
Don't know	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]**

Were you aware that the 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 of the SFCR would be your biggest challenge? Is it...

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

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

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. **[OPEN END]**

Don’t know / Refused 99

B1A. As you may know the CFIA assesses risk to help determine which types of companies need to be inspected. This is often referred to as Establishment-based Risk Assessment. How much have you read or heard about Establishment Risk Analysis.

A great deal	1
Some	2
Not much	3
Nothing at all	4
Rather not say	9

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) The CFIA inspections are conducted in a consistent manner.								
c) It is easy to understand the guidance the CFIA provides food businesses.								
d) The CFIA is not responsive when I ask regulatory questions								
e) Information from the CFIA arrives in a timely manner.								
f) CFIA inspections follow rigorous logic								
g) CFIA regulatory guidance is inconsistent								

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 general 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

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

G2. **[ASK IF ANY INTERACTION WITH CFIA AT C1A (1-4)]** 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. **[OPEN END]**

Don’t know / Refused 99

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 [Ask F1B] 3
- Don’t know/Refused **[DO NOT READ]** 9

F1A. **[ASK IF F1= YES, USED IT]** 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

F1B. **[ASK IF F1 = NO OR YES, BUT NEVER USED IT]** To the best of your knowledge which of the following licences or permissions does your company have from the CFIA? [Select all that apply]

- Safe food for Canadians Licence
- A food export certificate
- Another type of licence or certificate from the CFIA
- DK

F2. **[ASK IF F1= YES, USED IT]** 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. **[ASK IF F1= YES, USED IT]** Please expand on why you provide that rating. **[OPEN END]**

Don’t know / Refused 99

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]**

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.] [OPEN END]**

Don't know / Refused 99

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

None in particular 98

Don't know / Refused 99

G4B – where do you look, when looking for regulatory information? **[OPEN END]**

Don't know / Refused 99

QSoc. Do you follow CFIA on any of the following social media platforms? **[Check all that apply]**

- Facebook
- Twitter
- Instagram
- LinkedIn
- YouTube

QSoc.2 What kind of content do you prefer to see on CFIA social media channels? **[OPEN END]**

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.

PRE-TEST ONLY QUESTIONS

- A. Did you find any aspect of this survey difficult to understand? Y/N
 - B. [IF A=YES] If so, please describe what you found difficult to understand.
 - C. Did you find the way of the any of the questions in this survey were asked made it impossible for you to provide your answer? Y/N
 - D. [IF C=YES] If so, please describe the problem with how the question was asked.
 - E. Did you experience any difficulties with the language? Y/N
 - F. [IF E=YES] If so, please describe what difficulties you had with the language.
 - G. Did you find any terms confusing? Y/N
 - H. [IF G=YES] If so, please describe what terms you found confusing.
 - I. Did you encounter any other issues during the course of this survey that you would like us to be aware of? Y/N
 - J. [IF I=YES] If so, what are they?
-

Appendix F: Concepts

Figure A – We're Ready



Figure B – New Food Rules for Businesses



Figure C – New Food Rules for Businesses, Version A



Figure C – New Food Rules for Businesses, Version B



Figure C – New Food Rules for Businesses, Version C

