Canadian Food Inspection Agency | Agence canadienne d'inspection des aliments

Public opinion research with businesses and consumers for the CFIA annual reputation survey, 2020-2021

Final report

Prepared for the Canadian Food Inspection Agency

Supplier name: Patterson, Langlois Consultants
Contract number: 39903-210663/001/CY
Contract value: $240,441.74 (including HST)
Award date: December 9, 2020
Delivery date: March 28, 2021

Registration number: POR 077-20

For more information on this report, please contact the Canadian Food Inspection Agency at:
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Canada

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March 2021

This public opinion research report presents the results of the focus groups, in-depth interviews and online surveys conducted by Patterson, Langlois Consultants on behalf of the Canadian Food Inspection Agency. The research was conducted from March 3 to March 18, 2021.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique auprès des entreprises et des consommateurs aux fins du sondage annuel sur la réputation de l'ACIA 2020-2021

For more information on this report, please contact the Canadian Food Inspection Agency at:
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Catalogue Number: A104-208/2021E-PDF

International Standard Book Number (ISBN):
978-0-660-38901-1

Related publications (registration number): POR 077-20

A104-208/2021F (Final report, French)
978-0-660-38902-8

Political neutrality statement

I hereby certify as a Representative of Patterson, Langlois Consultants that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity 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 28, 2021

Principal,
Patterson, Langlois Consultants

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Executive summary

Purpose and design of this study

This study was commissioned by the Canadian Food Inspection Agency to assess the Agency's reputation and track the evolution of that reputation over time. The study was intended to capture the views of everyday Canadians and regulated businesses in the food, plant and animal industries about how well the CFIA is fulfilling its mandate.

In order to capture the diversity of Canadians' and Canadian business operators' views on the subject, this study examined reputation from multiple angles and with different tools. The survey asked Canadian consumers about their perception of the safety of the food available to them, how that is achieved and how they imagine the organization tasked with making it so both as it currently is, and how it might evolve more ideally in the future. Questions for consumers were asked qualitatively in a series of focus groups, and with a quantitative survey. We also assessed a number of similar questions with qualified Canadian business and industry association personnel including their assessment of the regulatory regime they are expected to work with, their assessment of the regulatory system, and about the challenges, adjustments, burdens, and opportunities that derive from their contact and relationship with the CFIA. These questions posed of businesspeople were also addressed qualitatively via focus groups and a survey conducted by email. Quantitative data from consumers was weighted to redress the sample so that it conforms to the characteristics of the Canadian population.

Readers of this study are reminded that the qualitative findings reported here should not be construed as representative of the Canadian population or of Canadian food businesses. The choice of focus groups and in-depth interviews was essential for allowing our research participants to provide their perspectives liberally and without the constraints of pre-established questions and answers. Since participants in the qualitative process were not selected randomly, they cannot be considered to speak for all Canadians or all regulated parties. That said, the consistency in their feedback and their deep knowledge of their own realities are sufficient to bestow the findings reported herein as highly relevant to the questions at hand.

The Canadian Food Inspection Agency's mandate is to safeguard food, animals and plants in order to protect the health and well-being of Canada's people, environment and economy. The Agency focuses not only on food production but is also responsible for animal health and plant protection. To these ends, the Agency designs, develops and implements a number of programs in collaboration with other federal departments, consumer advocacy groups, provincial and municipal organizations, and of course many different industry stakeholders. This collaboration around oversight, enforcement activities, acts and policies is necessary to ensure that the Agency is adapting appropriately and effectively to rapidly evolving realities in the market and around the world. These tasks are complex and require the Agency to not only capture but synthesize and distill feedback from many sources.

Additionally, and in order to interface properly and wield appropriate influence with its many stakeholders, the CFIA must not only maintain, but properly understand its reputation and brand image. This focus on reputation and brand image not only reflects the organization's valuation of its stakeholders, but its commitment to ensuring that both its internal and external actions are conducted in a way that preserves trust. To this end, the CFIA commissioned public opinion research to measure its reputation among key stakeholders, namely industries in the food, plant and animal sectors, as well as among Canadian consumers. This is the first iteration of a study to be repeated on a yearly basis. The data from this first study is expected to produce both initial benchmarks on pre-established metrics, as well as identify opportunities to expand and refine the CFIA's understanding of strategically important measures. The tracking study is expected to evolve into a key tool to help manage and develop the CFIA communication activities, provide information to assist in the Agency's strategic planning, as well as inform program, policy, and the delivery of services.

The objectives of this study were to:

- Track trust and reputation over time, and use the survey to measure results
- Gather data on reputation, trust and other brand attributes that allows the Agency to manage and develop the CFIA brand across all business lines.
- Measure the percentage of Canadians who agree that CFIA's activities help ensure food sold in Canada is safe
- Conduct key driver analysis to understand the role awareness, trust and confidence have on overall performance
- Test key messages and brand attributes
- Measure how food, plant and animal businesses and association stakeholders assess CFIA services
- Assess satisfaction with existing communication tools and tactics
- Assess preferred methods of communication for each stakeholder segment

Quantitative surveys with each audience were developed to assess the CFIA's reputation on a series of required and pre-established measures and performance indicators. Qualitative research in the form of in-depth interviews and focus groups were done to ensure that the Agency's reputation could be assessed from the perspective of these audiences, covering not only pre-identified measures but any additional aspects they deem important.

Surveys with 2,502 consumers were conducted with an online panel and took an average of 8 minutes to complete. The online panel was selected given the nature of the survey content and benefits of visual/screen interaction with Canadians for a series of key questions. This takes into account the limitations in generalizing the results to the target population and acknowledges that inferential statistics must not be applied when reporting on the collected data. Surveys with 1,993 Canadian businesses (1,372 with food businesses, 318 with plant, and 303 with animal) were also done online by emailed invitations sent out from Agency servers with assistance from Advanis Research and supplemented by additional purchased sample. These took 17 minutes on average to complete. Note that these categorizations are somewhat arbitrary in that a good proportion of participating food producers self-report as being in more than 1 line of business.

Qualitative research was conducted during the course of the research process to inform the development of quantitative instruments and assess key messages during and after field work was completed. With consumers, the work consisted of “mini” focus groups composed of between 2 and 5 consumers each and recruited across the geographical breadth of the country. Consumers were offered $100 for their participation in the study. Qualitative with business interests (including operators and association personnel) took the form of in-depth interviews ranging between 60 and 105 minutes. All of the qualitative interviews were conducted on Zoom given that this entire research project coincided with the COVID-19 pandemic and related rules regarding travel and social distancing. Business and association personnel were offered $250 for their participation in the study, many of which were refused or donated to charities.

Qualitative research is deployed to broaden our understanding of not only what audiences think, but how they think. Qualitative research is uniquely appropriate and effective for apprehending the diversity of perspectives on a given topic. The findings from qualitative inquiry are not and should not be construed as statistically representative of larger populations.

Consumer perceptions of the CFIA and food safety

The study results show that 10% of consumer respondents are capable of naming the CFIA on an unaided basis – a number that rises slightly in Ontario to 13% and a little higher in Atlantic Canada (16%). Aided awareness is considerably higher for the total sample at 71%. 19% of the total sample answer that they are familiar with the activities of the CFIA. Consistent with previous research, 78% of Canadians have strong confidence in the safety of Canada’s food supply. Finally, the results of this research clearly show that the CFIA enjoys the specific trust of Canadians to “to do what is right to ensure food is safe in Canada”, where some 66% score the Agency highly.

Qualitative discussions with consumers validate this assessment, but also reveal that their trust, most often with limited understanding of the scope, breadth or complexity of the Agency’s oversight, is more reflective of general faith in government. Findings suggest very clearly that the Agency has both opportunity and advantage in taking measures to better inform Canadians about what it does. Participants themselves acknowledge that they both want and should know more, and that their trust would be even stronger.

Specific indicators of trust

2 in 3 Canadians (66%) have a high level of trust in the CFIA to do what is right to ensure food is safe in Canada. When asked about their trust that food product labels identify ingredients that may cause allergy/food sensitivity, 68% of Canadians had a high level of trust.

More than 3 of 4 Canadians (76%) feel the CFIA is doing well to verify the food sold in Canada is safe. The belief that the CFIA is doing well to safeguard plant health (70%) and animal health (71%) is slightly lower than confidence around food.

Brand attributes assessment

Overall, consumers agree to a considerable extent with statements to the effect that “Food recalls are an example of the food system working” (77%), “Canada is fortunate to have an agency like the CFIA to regulate its food, animal, and plant businesses” (77%) and “The CFIA looks out for the best interests of Canadians” (75%).

Message evaluation

The messages that generate the most agreement include:

- “By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy.” (77%)
- “The CFIA works hard so Canadians have safe, high-quality food to feed their families.” (77%).
- “The CFIA issues food recalls in a timely manner” (73%),
- “The CFIA works hard to stop damage from invasive species or pests that could threaten Canada's Agriculture sector” (71%),
- “The CFIA protects consumers from food misrepresentation and food fraud” (71%)
- “As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks.” (70%)
- “The CFIA enforces regulations that helps ensure animals are transported humanely” (67%).

Business perceptions of the CFIA

Both our qualitative and quantitative findings suggest that the relationship between the Agency and the businesses it regulates is largely healthy. Food, plant and animal businesses, of course, have a much bigger stake in understanding the CFIA compared to consumers, and of course are subject to varying levels of oversight that predispose them to higher awareness, more informed opinions and, not surprisingly, more critical postures regarding the Agency. This report outlines a lengthy list of complaints and, on occasion, grievances, but these do not belie the general consensus we found that the Agency and its relations with industry are improving.

The Agency's reputation among the businesses it regulates reflects high levels of familiarity (72%), with 73% for food, 74% for animal and 71% for plant businesses respectively. Additionally, our results show strong performance by the CFIA to safeguard food (89%), and for safeguarding plant health (85%) and animal health (85%) as assessed by businesses. The CFIA generates strong rates of understanding with nearly all scores for all listed communication sources being higher than 80% overall and across all lines of business. Personal interaction netted the highest understanding rate (93%) for the total sample: food (92%), animal (90%) and plant (95%). The CFIA website had lower scores (total 79%, food 80%, animal 81%, plant 74%).

In qualitative research, there were mentions of issues stemming from perceptions that the Agency has been reducing its resources with the consequence that some now find it much more difficult to find someone in the Agency able or willing to resolve ambiguities in the regulation and a growing tendency to divert people with requests for information or guidance to not-always-satisfying online sources of information.

CFIA attributes and institutional values

The survey measured response to a battery of statements to assess how the CFIA is perceived amongst the businesses it regulates. There were no significant differences in agreement scores across lines of business. It was very encouraging to note that there are high levels of agreement (5, 6, or 7 on a 7-point scale) for statements that reference respect, helpfulness and fairness. Statements that scored above 66% were: 'Representatives of the CFIA are respectful in carrying out their duties' (76%), 'Information received from the CFIA is helpful in preventing future non-compliance' (73%), 'Overall, the CFIA is a fair regulatory agency' (73%) and 'Representatives of CFIA are helpful in providing us with information on regulations' (69%).

The CFIA received lower scores for how much they agree with the statements 'listening to industry views when it comes to understanding specific regulatory priorities' (48% agree) and many also do not think 'The CFIA listens to the industry when it comes to understanding specific innovation and competitiveness needs'

(44% agree). While the CFIA scores well for being sensitive to industry specific operational realities, they are not perceived to thoroughly understand needs and priorities relating to regulations, innovation and competitiveness. These are findings largely echoed in our discussions.

Key drivers analysis

We conducted a driver analysis to measure the relative importance of organizational culture attributes in predicting familiarity, trust or confidence in the CFIA. As a result, for each measure there is a uniquely important primary driver that the Agency should focus their communication on in order to facilitate building familiarity, trust and confidence in the CFIA among businesses.

The primary driver of familiarity with the CFIA is respect and fairness ("Representatives of the CFIA are respectful in carrying out their duties (21%)) ("Overall, the CFIA is a fair regulatory agency" (10.2%)).

In assessing the predictors of trust in the CFIA, the primary driver is again fairness, along with perceptions that the Agency provides assistance with preventing non-compliancy: ("Overall, the CFIA is a fair regulatory agency" 17.9%), ("Representatives of the CFIA are respectful in carrying out their duties" 9.0%), ("Information received from the CFIA is helpful in preventing future non-compliance" 8.1%) and ("CFIA is consistent in how they operate within their mandate" 8%).

Finally, the CFIA gains the confidence of its business stakeholders by communicating about managing complexity, fairness and transparency ("The CFIA is properly equipped to manage the complexity of Canada's food, animal and plant supply chain" 25%), ("Overall the CFIA is a fair regulatory agency" 11.8%) and ("CFIA is transparent in how they operate" 9.5%).

Assessment of CFIA communications and relations with industry

Most food, animal and plant businesses cite email (58%) as the most common mode of communication, followed by the CFIA website (46%) and then personal interaction with a representative (34%). These top 3 communication channels also score highly on understanding and satisfaction with businesses. However, in terms of future preference we see that overwhelmingly email is the preferred method of future communication (77%). Use of telephone communications (30%), personal interaction (28%) and CFIA website (24%) to accompany the primary email communication would work best for most businesses.

Most satisfaction is driven by email (48%), with an incremental 13% coming from the CFIA website and then an additional 8% from personal interaction with representatives. A focus on the top 3 will drive the highest satisfaction with businesses.

Just over two-thirds (68%) of businesses are very satisfied with the tools the CFIA uses to communicate. This is consistent across all 3 industry segments.

Background and objectives

Background

The following statement taken from the originating Statement of Work (SOW) developed for contracting purposes lays out the relevant background to this study, in effect highlighting the mandate and accountabilities of the Agency and the expected utility of this research:

> “The mission of the Canadian Food Inspection Agency is dedicated to safeguarding food, animals and plants, which enhances the health and well-being of Canada's people, environment and economy. Mitigating risks to food safety is a top CFIA priority, and the health and safety of Canadians is a key force behind the design and development of CFIA programs. The CFIA, in collaboration and partnership with industry, consumers, and federal, provincial and municipal organizations, continues to work towards protecting Canadians from preventable health risks related to food and zoonotic diseases.
>
> The current and future economic prosperity of the Canadian agriculture and forestry sectors relies on a healthy and sustainable animal and plant resource base. As such, the CFIA is continually improving its program design and delivery in the animal health and plant resource areas in order to minimize and manage risks. In an effort to protect the natural environment from invasive animal and plant diseases and plant pests, the CFIA also performs extensive work related to the protection of environmental biodiversity.”

The Statement of Work also details its regulatory activities across 3 different business lines:

> “**Animal:** To protect human and animal health, the CFIA conducts inspections and has monitoring and testing programs in place to prevent and control the spread of diseases to the livestock and poultry sectors. The CFIA carries out programs related to animal health and production to guard against the entry of foreign animal diseases and to prevent the spread of certain domestic animal diseases.
>
> **Plant:** The Canadian Food Inspection Agency (CFIA) works with other federal departments and agencies to:
>
> - develop and set plant-health related policies and standards
> - develop and implement regulations and plant health-related programs
> - set international standards and rules for trade
> - inspect goods as they come into the country
> - survey for pests and threats, trap insects, sample and observe soil and plants
>
> The CFIA works closely with the provincial and territorial ministries of agriculture, environment and forestry. The Canadian Food Inspection Agency (CFIA) establishes and maintains policies and standards to prevent the introduction and

spread of plant pests in Canada. Protecting plant health means safeguarding crops, ecosystems, forests and natural habitats from invasive plant pests and diseases. The United Nations has designated 2020 as the Year of Plant Health. With respect to food, detailing how their activities in this area have been influenced by the coming into force of the *Safe Food for Canadians Act* (SFCA) and the pandemic:

> **Food**: On January 15, 2019, the *Safe Food for Canadians Regulations* (SFCR) came into force along with the *Safe Food for Canadians Act* (SFCA). While all SFCR requirements were to be met immediately upon coming into force by businesses subject to previous specific food commodity legislation (for example, meat, fish, dairy, eggs and processed egg products, processed fruits and vegetables, fresh fruit and vegetables, honey, and maple products), the manufactured food sector (MFS) was given until July 2020, and, for some businesses in this sector, July 2021 to meet the new requirements. However, the emergence of the COVID-19 pandemic in March 2020 triggered a change in CFIA enforcement priorities which resulted in the introduction of a phased approach to enforcement and implementation of some activities. Accordingly, CFIA communication activities and products targeting the MFS were postponed or adjusted. The CFIA is not prioritizing enforcement activities related to the new requirements at this time but are actively promoting the need for food businesses in general to meet the SFCR requirements."

And finally stipulating why and in what ways "reputation" is important:

> "The reputation and credibility of the CFIA are vital to our ability to deliver our mandate. As such, a key part of the CFIA's values is that our actions, internally and externally, are conducted in a way that trust is preserved."

Objectives

The overall objective of this study is to gain longitudinal and qualitative insights into the reputation that the CFIA has amongst Canadian businesses and consumers and to track the evolution of that reputation over year. More specifically, the objectives include:

- Gather data on reputation, trust and other brand attributes that allows the Agency to manage and develop the CFIA brand over all business lines.
- Measure the percentage of Canadians who agree that CFIA's activities help ensure food sold in Canada is safe.
- Conduct key driver analysis to understand the role awareness, trust and confidence have on overall performance.
- Test key messages and brand attributes.
- Measure how stakeholders assess CFIA services.
- Assess satisfaction with existing communication tools and tactics.
- Assess preferred methods of communication for each stakeholder segment.

The total cost to conduct this research was $240,441.74, including HST.

Methodology

Quantitative methodology

The quantitative analysis involved 2 surveys, 1 for businesses and the other for consumers. The consumer portion of the study was conducted as a Canadian online panel. The desired sample structure is available below. A total of 2502 completed surveys were collected across Canada between March 12th and March 18th, 2021. There was a completion rate of 85% and an average interview length of 8 minutes.

Quota	Target Completes	Actual Completes
Region		
Atlantic Canada	161	163
Quebec	564	566
Ontario	969	973
Manitoba	91	91
Saskatchewan	77	77
Alberta	291	291
British Columbia	338	338
Territories	8	3
Age		
18 - 24	274	262
25 - 34	431	427
35 - 44	414	412
45 - 54	393	396
55 - 64	431	439
65+	556	565
Prefer not to answer	-	1
Gender		

Male	1250	1240
Female	1250	1237
Other	-	17
Prefer not to answer	-	8
Total	**2500**	**2502**

Weighting:

Quantitative data from consumers was weighted to redress the sample so that it conforms to the characteristics of the Canadian population. The consumer sample (N=2502) was weighted using Statistics Canada figures for age and gender. This was repeated across regions to account for regional fallout differences during fielding.

Results were weighted to reflect the following:

REGION/PROVINCE	Population %
Alberta	12%
Atlantic	6%
British Columbia	14%
Manitoba	4%
Ontario	39%
Quebec	23%
Saskatchewan	3%
Territories	0%
Grand Total	**100%**

Gender	Population %
Male	50%
Female	50%

	100%

Age Groups	% of Total
18-24	11%
25-34	17%
35-44	17%
45-54	16%
55-64	17%
65+	22%
Grand Total	**100%**

The business survey consisted of 1 online survey with 2 methods of recruitment:

- First, the CFIA sent emailed invitations to businesses for which it had collected emails and then sent up to 3 reminder emails over the following 14 days. A total of 7,219 invites were sent and 1016 respondents completed the survey (139 French, 877 English), resulting in a completion rate of 14%.

- A second two-step recruitment process was used to reach businesses not currently on the CFIA lists. A first step consisted of recruiting by telephone, from which willing respondents were then sent a link to the online survey, either by email or SMS, depending on their preference. Businesses recruited in this manner were identified from lists purchased from ASDE Inc. and managed for quota purposes by way of NAICS and SIC codes. After a respondent agreed to participate, they were reminded to complete the survey 3 days and 6 days after the initial invitation.

In total, 10,168 phone numbers were called, and 1,659 people agreed to participate in the survey. Of these calls, 11% were conducted in French and 89% were conducted in English. To increase the response rate, inbound calling was allowed and directed to interviewers trained on the survey. If the potential respondent called from the phone that was initially dialed by someone in the call centre, the calling record was automatically displayed to an interviewer. A total of 167 inbound calls were received, and of those, 45 were then recruited to participate. On average recruitment calls took approximately 3 minutes. An overall response rate of 23% was achieved on the recruiting calls. In total, 511 people (57 French, 454 English) who were recruited by phone completed the web survey, for an incidence rate of 31%.

The average survey length for the online survey was 16.5 minutes. This number is an average -- survey duration will have varied because not all respondents completed the survey all at once. Data was collected between March 3rd and March 17th, 2021.

Quotas were monitored to ensure adequate numbers of completions among businesses in the food, animal, or plant lines. The details are provided below:

Quota	Target Completes	Actual Completes
CFIA Sample		
Food business	500	912
Animal business	300	176
Plant business	300	132
Recruit to Web sample		
Food business	-	460
Animal business	200	142
Plant business	200	171
Total	**1500**	**1527**

Qualitative methodology

Chosen method

Given the objectives set out for this study, the method of in-depth individual interviews was chosen for all business and association personnel sessions. In-depth interviews were appropriate given the need to allow participants sufficient time to describe their experiences, express their view and explain the particulars of their business operations. Consumers were met in focus groups of between 3 and 5 participants each – a somewhat smaller than usual size, but necessary given the constraints of the COVID-19 pandemic and the need to conduct these interviews over the Internet.

Number, location and composition of groups

We conducted some 8 in-depth interviews with industry association people in 1-on-1 or in pairs when requested by participants. 4 of these interviews were done with associations representing food businesses, 2 who represent plant and 2 who represent animal businesses. 4 of these interviews with association people included producers as well.

Finally, a total of 17 business operators were interviewed singly over Zoom. Both business and consumer participants were recruited from across the country and were distributed equally across food, plant and animal business lines.

Recruiting screener

Recruiting screening questionnaires designed to facilitate the recruiting process were developed prior to the start of the process and approved by the contracting authority. Copies of these are appended to this report.

Incentive fees

Consumers were offered $100 for their participation. Business operators and association personnel were offered $250 for their participation. Several business and association participants refused the incentive and many more asked that they be given to their associations or preferred charity.

Moderating and analysis

John Patterson moderated all interviews and was solely responsible for the analysis of results and related reporting.

Detailed results

Consumer perceptions of the CFIA and food safety

Awareness of the CFIA

Canadians have moderate aided awareness of the CFIA (71%) overall, although this rate is lower amongst those under age 35 (57%) and significantly lower among Quebecers (60%). When asked to stipulate which organizations in Canada are tasked with food safety (unaided awareness), the number of Canadians who could specifically name the CFIA was considerably lower (10%), a number that rises slightly in Ontario to 13% and a little higher in Atlantic Canada to 16%. Canadians aged 35-54 had the significantly highest unaided awareness of CFIA at (14%). When asked specifically about animal health and plant health the awareness numbers for CFIA are lower still; only 3% cited CFIA as the organization tasked with animal health and 4% as the organization tasked with plant health.

Half of Canadians (50%) are aware that moving untreated firewood from a campground or cottage can spread invasive species. Interestingly, only 1 in 7 (14%) Canadians are aware that the CFIA is responsible for regulation of the trans-border movement of pets. Of those, 24% have recently acquired a new pet.

Familiarity and sources of awareness

Just under 20% of consumers consider themselves to be very familiar (5, 6 or 7 on a 7-point scale) with the CFIA. This is consistent across regions. Those under age 35 tend to have somewhat higher levels of familiarity (26%) versus those 35-54 (23%) and 55+ (10%). While familiarity is low among consumers (19%), 1 in 3 (35%) recall seeing/ hearing about the CFIA through traditional media, and another 1 in 4 (24%) recall information via the Internet. Some 37% have no recall of hearing or seeing anything related to the CFIA.

These findings suggest that the Agency has an interest in supporting its awareness objectives with appropriate messaging about its role in food safety as well as plant and animal health.

A3: Where have you seen, heard, or read about the CFIA?

Not applicable – have not seen, heard or read anything about the CFIA	37%
Traditional media (newspapers, TV, radio)	35%

Internet (includes internet-based news sites but not social media)	24%
Word of mouth	17%
Social media (not including CFIA social media)	10%
Direct contact from CFIA (includes CFIA social media and visiting the CFIA website)	5%
A digital assistant (for example, Alexa, Siri, Google)	3%

Base: consumer total N = 2502

The following chart illustrates varying rates of comprehension of CFIA related information absorbed from different sources. Not surprisingly, understanding of information about the CFIA is highest (80% combined 5, 6, or 7 scores on a 7-point scale) when contact is direct with the Agency. Information absorbed from digital assistants, such as Alexa, Siri and Google (71%), and internet sources (excluding social media) is clear for 60%, whereas social media sourced information is clear for 57%. Interestingly the clarity of digital information is higher than traditional media (56%) and word of mouth (53%).

A4: Thinking about what you have seen, heard, or read about the Canadian Food Inspection Agency (CFIA) indicate how well did you understand the information?

Source	1 – Not at all	2	3	4	5	6	7 – Understand completely
Direct contact from CFIA (includes CFIA social media and visiting the CFIA website)	1%	3%	7%	10%	24%	26%	29%
A digital assistant (e.g., Alexa, Siri, Google)	4%	2%	3%	20%	32%	15%	24%

Social media (not including CFIA social media)	1%	5%	15%	22%	26%	16%	14%
Internet (includes internet-based news sites but not social media)	2%	5%	12%	22%	30%	16%	14%
Word of mouth	4%	6%	12%	26%	28%	11%	13%
Traditional media (newspapers, TV, radio)	2%	6%	13%	24%	29%	16%	12%

Base: Consumer, those who recall having seen/heard/read about CFIA (base differs by where information was recalled)

Looking specifically at the 5% of Canadians who report direct contact with the CFIA, the majority (63%) report visiting the CFIA website. Lower proportions of respondents (28%) subscribe to food recall notices and even fewer (22%) follow the CFIA on social media.

A3a: Select all the following that apply to you:

I have visited the CFIA website	63%
I subscribe to CFIA food recall notices	28%
I follow the CFIA on a social media platform	22%
I have contacted the CFIA by email or through the website	18%
In person interaction with a CFIA employee	18%
I submitted a food safety or labelling concern	15%
I have contacted the CFIA by phone	15%

Base: Consumer direct contact with CFIA n = 137

Although on a small base (n=137), satisfaction scores with specific forms of direct contact with the Agency vary. The highest satisfaction (8, 9, 10 on a 10 point scale) was cited for “CFIA issues food recall notices in a timely manner” (83%) followed by “the CFIA’s handling of the food safety or labelling concern you reported” (71%) and then 69% for “CFIA content on social media.”

A3ai: Using a scale of 0-10 where 0 is not at all satisfied and 10 is very satisfied, how satisfied are you…

	0	1	2	3	4	5	6	7	8	9	10
that the CFIA issues food recall notices in a timely manner	0%	3%	0%	0%	3%	0%	3%	10%	18%	15%	49%
with the CFIA handling of the food safety or labelling concern you reported	0%	0%	0%	5%	0%	10%	10%	5%	10%	20%	40%
with the CFIA content on social media	0%	0%	0%	0%	0%	10%	7%	17%	23%	13%	30%
with the CFIA phone interaction you had	0%	0%	0%	0%	0%	0%	6%	22%	22%	22%	28%
with the usability of the CFIA website	0%	0%	0%	4%	5%	8%	10%	16%	22%	19%	17%
with the CFIA email or website contact you reported	0%	0%	0%	0%	0%	4%	8%	25%	38%	13%	13%

Base: Consumer direct contact with the CFIA n = 137, base differs by statement selected

Confidence in the safety of Canada’s food supply

Consistent with previous research, 78% of Canadians have considerable confidence in the safety of Canada’s food supply; (5, 6 or 7 on a 7-point scale). Those in Atlantic Canada have a higher rate of confidence (85%), and French speaking homes in Canada have a lower confidence rate (71%) as well as those with a household income less than $40,000 (72%).

A7: Please rate your level of confidence that food sold in Canada is safe.

1 – Not at all confident	1%
2	1%
3	5%
4	15%
5	26%
6	31%
7 – Very confident	21%

Base: Consumer total sample N=2502

Qualitative insights

The quantitative results clearly show the dichotomy between Canadians' considerable trust in the safety of their food supply and their very low awareness of and familiarity with the Agency's activities that enables that confidence. Our qualitative discussions about safety provided additional validity to this appraisal of the public opinion landscape. These findings suggested that while Canadians' confidence in the safety of their food is a matter of faith, this faith is arguably blind in that it is accorded without much consideration or knowledge of the scope and complexity of the Agency's oversight activities. Indeed, participants themselves are aware that their faith in food safety is an extension of their general faith in government.

Subsequent discussion about these and related matters suggest that additional in-depth understanding of the Agency's role in food safety, the scale of its monitoring and so on would add considerably to Canadians' confidence. By the same token, it was equally clear that without this basic understanding, Canadians' confidence can easily be diminished by a spike in recalls or critical social or mainstream media coverage. No less importantly, we assess that Canadians are more inclined to downplay or dismiss the Agency's role in protecting the safety of food without this understanding. In sum, the Agency enjoys the fragile trust of Canadians, one that may prove more resilient were they to be better informed about what it does.

Specific indicators of trust

2 in 3 Canadians (66%) have a high level of trust (5, 6, or 7 on a 7-point scale) in the CFIA to do what is right to ensure food is safe in Canada. This is higher among those aged 35+ (68%) versus those under 35 (62%). When asked about their trust that food product labels identify ingredients that may cause allergy/food sensitivity, 68% of Canadians had a high level of trust (5, 6, or 7 on a 7-point scale). In reviewing the data from only those who report having food allergies/ sensitivities (23% of Canadians), the level of trust is slightly lower at 62% (5, 6, or 7 on a 7-point scale).

A5: Please indicate how much you trust the Canadian Food Inspection Agency (CFIA) to do what is right to help ensure that food is safe in Canada

1 – Do not trust at all	2%
2	2%
3	7%

4	23%
5	28%
6	23%
7 – Trust completely	15%

Base: Consumer total sample N=2502

A6: How much do you trust that food product labels have indications regarding ingredients that may cause allergy/food sensitivity?

1 – Do not trust at all	2%
2	2%
3	7%
4	21%
5	28%
6	26%
7 – Trust completely	14%

Base: Consumer total sample N=2502

More than 3 of 4 Canadians (76%) feel the CFIA is doing well (5, 6 or 7 on a 7-point scale) to verify the food sold here is safe. This is consistent across demographics. The belief that the CFIA is doing well (5, 6 or 7 on a 7-point scale) to safeguard plant health (70%) and animal health (71%) is slightly lower than confidence around food.

A7a: When it comes to verifying that food sold in Canada is safe, how well do you believe the CFIA is doing?

1 – Not doing well	1%
2	1%
3	4%
4	17%
5	26%
6	31%

7 – Doing well	19%

Base: Consumer total sample N=2502

A7b: When it comes to safeguarding plant health (regulating pests and invasive species), how well do you believe the CFIA is doing?

1 – Not doing well	1%
2	1%
3	5%
4	22%
5	30%
6	25%
7 – Doing well	15%

Base: Consumer total sample N=2502

A7c: When it comes to safeguarding animal health and preventing animal diseases, how well do you believe the CFIA is doing?

1 – Not doing well	1%
2	2%
3	6%
4	20%
5	29%
6	28%
7 – Doing well	14%

Base: Consumer total sample N=2502

Qualitative insights

Recalls and their contribution to public trust in food safety

While all of our participants had memory of food safety recalls and relatively well-formed opinions and presumptions about how they happen, why they happen, who initiates them and so on, awareness of the specifics vary considerably. From our discussions, we observed the following:

- A plurality (but not a majority) of participants believe recalls are detected and are initiated when consumers get sick in sufficient numbers.
- A smaller proportion suggest that problems are detected at some point in the production process, perhaps after products have begun to be shipped to market but before they have all left the facility.
- A smaller number still suggest that issues are detected by retail outlets as a result of consumer complaints and initiated either voluntarily by the retailer or by the manufacturer.

Generally, most participants understand that recalls are related to the detection of harmful bacteria such as listeria or E-coli. A predominant view emerged, however, that the relative infrequency of recalls is evidence of a properly functioning system. That said, participants' confidence decreases whenever recalls seem more frequent or when they occur repetitively with the same food types, as is illustrated by the still prevalent hesitation among participants to buy romaine lettuce years after the last recalls. It is also apparently a by-product of their lack of understanding of the Agency's ongoing oversight activities.

Brand attributes assessment

This study measured agreement (5, 6, or 7 on a 7-point scale) with statements about the CFIA. Overall, consumers agree to a considerable extent with statements to the effect that "Food recalls are an example of the food system working" (77%), "Canada is fortunate to have an agency like the CFIA to regulate its food, animal, and plant businesses" (77%) and "The CFIA looks out for the best interests of Canadians" (75%). Statements around efficacy and fairness of the CFIA generated more middling scores; "The CFIA is effective in enforcing food safety regulations" (67%), "The CFIA is an effective organization" (67%) and "All businesses are treated fairly by the CFIA" (53%). The following statements were agreed with by less than half of consumers and allude to their uncertainty about the details of what the CFIA does and specifics around regulations; "I understand what the CFIA does" (49%), "Getting more information about food, plant or animal safety from the CFIA is easy" (44%), and "CFIA regulations are not strict enough" (39%).

A8: Below are a number of statements about the CFIA. For each statement, please indicate how much you agree or disagree.

Statement	1 – Disagree completely	2	3	4	5	6	7 – Agree completely	N/A
Canada is fortunate to have an agency like the CFIA to regulate its food, animal, and plant businesses	1%	1%	4%	13%	25%	24%	28%	5%

Food recalls are an example of the food system working	1%	1%	4%	13%	25%	25%	27%	4%
The CFIA looks out for the best interests of Canadians	1%	1%	4%	14%	26%	26%	22%	5%
The CFIA is an effective organization	1%	1%	5%	17%	27%	23%	17%	10%
The CFIA is effective in enforcing food safety regulations	1%	2%	5%	17%	28%	25%	15%	8%
All businesses are treated fairly by the CFIA	2%	2%	5%	18%	21%	18%	14%	20%
I understand what the CFIA does	3%	5%	13%	23%	24%	14%	11%	7%
CFIA regulations are not strict enough	4%	6%	11%	21%	18%	12%	9%	19%
Getting more information about food, plant, or animal safety from the CFIA is easy	1%	3%	8%	20%	22%	14%	9%	24%

Base: Consumer total sample N = 2502

Qualitative insights

Here too we see the particular nature of the faith Canadians accord to the safety of their food. Most feel that trust is justified given the relatively infrequent problems they have incurred personally or heard about in the media. On the other hand, previous quantitative measures and our qualitative discussions make clear that most Canadians do not apprehend much of the scope, depth or complexity of the Agency’s activities.

Key driver analysis

The following “key driver analysis” specifies the relative importance of each of the predictor variables using the attributes at A8 to predict the outcome variable (familiarity, trust or confidence). The results of this analysis show that for each measure, there are several important drivers that the Agency can emphasize in their communications to build consumer familiarity, trust and confidence in the CFIA.

Key driver analysis shows that communication to help consumers understand what the Agency does, and further ways to get information about it are the most important drivers to build familiarity with the CFIA. “I understand what the CFIA does” (47%) is the most important driver of being familiar with the Agency, followed by “Getting more information about food, plant or animal safety from the CFIA is easy” (25%). This observation underscores how gains in familiarity can be had by focusing on making it easier for Canadians to encounter information about the nuts and bolts of what the Agency does.

CFIA – all attribute drivers of A2 familiarity (total sample)	
Statement	**Share of Importance (%)**
I understand what the CFIA does	47.2
Getting more information about food, plant, or animal safety from the CFIA is easy	25.0

The CFIA is an effective organization	7.1
All businesses are treated fairly by the CFIA	5.7
The CFIA is effective in enforcing food safety regulations	5.2
CFIA regulations are not strict enough	4.5
The CFIA looks out for the best interests of Canadians	2.1
Canada is fortunate to have an agency like the CFIA to regulate its food, animal, and plant businesses	1.9
Food recalls are an example of the food system working	1.3

The data shown below shows how trust in the Agency is tied to the degree to which Canadians believe that the Agency is focused on and effective in protecting their interests.

CFIA – all attribute drivers of A5 trust (total sample)	
Statement	**Share of Importance (%)**
The CFIA looks out for the best interests of Canadians	17.5
Canada is fortunate to have an agency like the CFIA to regulate its food, animal, and plant businesses	15.2
The CFIA is an effective organization	14.2
The CFIA is effective in enforcing food safety regulations	13.0
Food recalls are an example of the food system working	11.9
All businesses are treated fairly by the CFIA	11.4
I understand what the CFIA does	9.5
Getting more information about food, plant, or animal safety from the CFIA is easy	7.1
CFIA regulations are not strict enough	0.3

From the following analysis, we see that confidence in the CFIA is a reflection of the Agency's very presence ("Canada is fortunate to have an agency to regulate food, animal and plant businesses"), which has a 21.1% share of importance, their understanding of the Agency's mandate ("the CFIA looks out for the best interests of Canadians" which has an 18.1% share of importance), and, interestingly, their understanding that recalls are evidence of the enactment of that mandate ("Food recalls are an example of the food system working" 16.1% share of importance.) Consumers want to feel confident and see evidence that the CFIA is working for them and are made more confident when they do.

CFIA – all attribute drivers of A7 confidence (total sample)	
Statement	**Share of Importance (%)**
Canada is fortunate to have an agency like the CFIA to regulate its food, animal, and plant businesses	21.1

The CFIA looks out for the best interests of Canadians	18.1
Food recalls are an example of the food system working	16.1
The CFIA is effective in enforcing food safety regulations	15.1
The CFIA is an effective organization	12.2
All businesses are treated fairly by the CFIA	9.1
Getting more information about food, plant, or animal safety from the CFIA is easy	4.3
I understand what the CFIA does	2.9
CFIA regulations are not strict enough	1.1

Message evaluation

Based on agreement ratings (5, 6, or 7 on a 7-point scale), the messages that generate the most agreement include “By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy.” (77%) and “The CFIA works hard so Canadians have safe, high-quality food to feed their families.” (77%). Secondary messaging that reaches consumers show high agreement with “The CFIA issues food recalls in a timely manner” (73%), “The CFIA works hard to stop damage from invasive species or pests that could threaten Canada's agriculture sector” (71%),” The CFIA protects consumers from food misrepresentation and food fraud” (71%), “As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks.” (70%) and “The CFIA enforces regulations that helps ensure animals are transported humanely” (67%).

B1: Below are some statements to describe the activities of the Canadian Food Inspection Agency (CFIA). How much do you agree or disagree with each of the following statements?

Statement	1 – disagree completely	2	3	4	5	6	7 – agree completely
By protecting Canada’s food, animals, and plants, the CFIA is contributing to the health and well-being of Canadians, the environment, and the economy	1%	1%	5%	16%	24%	29%	25%
The CFIA works hard so Canadians have safe, high-quality food to feed their families	1%	1%	4%	17%	29%	28%	20%
The CFIA issues food recall warnings in a timely manner	1%	1%	4%	20%	28%	26%	19%
The CFIA protects consumers from food	2%	1%	6%	21%	29%	25%	17%

misrepresentation and food fraud							
The CFIA works hard to stop damage from invasive species or pests that could threaten Canada's agricultural sector	2%	1%	5%	21%	29%	25%	17%
As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks	2%	1%	5%	22%	28%	26%	16%
The CFIA enforces regulations that help ensure animals are transported humanely	3%	2%	7%	23%	29%	23%	15%

Base: Consumer total sample N = 2502)

We conducted a TURF analysis (Total Unduplicated Reach and Frequency) to measure which individual and unique messages contribute most to what consumers hear about the Agency. This provides guidance on which themes constitute an essential messaging strategy. The most effective message overall was "By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy" which met with agreement from 77% of respondents. The next most unique and effective message (identified by removing all participants who selected the first message) is "The CFIA issues food recall warnings in a timely manner", which generates an incremental 6% contribution to reach. The remaining contributing message is "The CFIA works hard so Canadians have safe, high-quality food to feed their families" which adds an incremental 3%. Incremental reach levels off at this point, showing that these 3 messages have the potential to reach 86% of consumers.

CFIA consumer B1 messages - incremental reach (T3B%) (Base: total sample)		
Statement	**Incremental Reach**	**Cumulative Messaging Reach**
By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy	77%	77%
The CFIA issues food recall warnings in a timely manner	6%	84%
The CFIA works hard so Canadians have safe, high-quality food to feed their families	3%	86%

As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks	1%	87%
The CFIA protects consumers from food misrepresentation and food fraud	1%	88%
The CFIA enforces regulations that helps ensure animals are transported humanely	0%	88%
The CFIA works hard to stop damage from invasive species or pests that could threaten Canada's Agriculture sector	0%	88%

Consumer perceptions of CFIA institutional attributes and values

When asked to consider a list of attributes that apply to the CFIA, “Scientific” (43%) and “Trusted” (41%) are cited most often. Roughly a third of respondents selected “Informative”, “Responsive” and “Dedicated”. Words not generally associated with the CFIA are “Outdated: (5%), “Biased” (4%), “Agile” (4%), “Punitive” (3%) and “Ignorant” (2%). These findings substantiate qualitative insight to the effect that Canadians’ views of the Agency are based on trust and an understanding that ensuring food safety reposes on science.

B4 Please look at the following list of words, and select the ones that in your view, describe the CFIA	
Word	**%**
Scientific	43%
Trusted	41%
Informative	33%
Responsive	33%
Dedicated	31%
Efficient	30%
Caring	24%
Fair	24%
Intelligent	23%
Consistent	21%
Service oriented	21%
Modern	15%
Transparent	14%
Innovative	12%
Global leader	12%
Diverse	12%
Empowering	9%
Slow	8%
Inclusive	8%
Enabling	8%

Partner	7%
Flexible	7%
Rigid	7%
Cutting edge	6%
Inconsistent	6%
Outdated	5%
Biased	4%
Agile	4%
Punitive	3%
Ignorant	2%
None of the above	8%

Base: Consumer total N = 2502

When asked to rank the top 3 attributes that describe the CFIA, the same words were ranked in #1 most often: “Scientific” (18%), “Trusted” (16%), “Informative” (7%) and “Responsive” (7%).

Qualitative insights

Unprompted discussion of the Agency’s attributes in our qualitative sessions underscore participants own recognized lack of specific awareness and understanding. That said, and as had been discussed previously, participants were able to extrapolate some institutional attributes and values of some “food regulating government body” if only as rationalization of their confidence in the safety of the food they buy, and presumably, what they know of government generally. Later in our discussions we were able to talk about the ideal attributes of the institution which in turn says something about the kinds of food-related preoccupations and aspirations Canadians have. Finally, these 2 images provided a reasonable backdrop for assessing some of the current messaging envisaged within the Agency.

Imagined attributes of the Agency as it is currently

Participants can imagine some things about the Agency in its current state, namely that it is:

- Rather hefty, or at least as large as would be necessary to ensure some degree of oversight across the breadth of the country and the variety of food producers in Canada, although virtually no participants were willing to venture a guess about the number of employees or budget of the Agency.

- Somewhat more reactive than proactive in its pursuit of food safety in that most participants imagine that oversight is a constant, but also insufficient to completely prevent recalls and food illness outbreaks. A good measure of this presumption also stems from the fact that food recalls are one of the few publicly noticeable signs of Agency presence.

- For a few, the Agency is presumed to be more focused on present conditions and challenges than forward-looking, although this appears to be a presumed attribute of government generally and not specifically or solely of the CFIA.

- Conservative, in the sense that participants generally imagine the CFIA to stick to what works, be wary of new ways of working, and so on.

- Transparent at least in so far that recalls are a sign of institutional willingness to "air dirty laundry."

- Dedicated and attentive to its mandate, which is a sort of logical feature to explain participants' general trust in the food supply.

- To some degree, challenged in terms of resources and people to oversee the entire supply chain and imports.

When queried more specifically about how the Agency currently interfaces with food industries, participants imagined the Agency as …

- Strict and consistent, but also fair and collaborative with the industries it regulates. Participants were not prone to recognizing the impact that regulations and regulators can have on competitiveness and innovation, but a balanced relationship is presumed, and presumed to be good for all.

- Endowed with people who are competent in their fields.

- Staffed with inspectors who are honest, resistant to corruption and who strike a balance between the closeness that is necessary for oversight and the need for arms-length relationships with the businesspeople they deal with.

Ideal Agency attributes

Participants were generally more articulate and forthcoming about how they would like the Agency to be and spoke to the following attributes which in some cases reflect hopes for the current state, and in some cases reflect a vision of what might be at some point in the future. An ideal food safety oversight agency would be…

- Proactive to some degree in that it would be working to augment systems and procedures to continue reducing the frequency of recalls, but also able to adjust to new operating realities, technologies and so on in a timely fashion.

- Forward-looking with respect to new science and new information about food. For some consumers, this wish for forward-looking oversight of food implies a disposition to consider not only short-term safety but food's longer-term health effects. A smaller but vocal minority suggests that "safe food" should also reflect environmental impacts. These views are consistently expressed by consumers who buy their food and feed their families in accordance with these same values.

- As explicit and clear as possible with respect to labeling information, stemming from concerns that labels don't always tell the full story, particularly with respect to things such as the presence of allergens, GMOs and so on.

- More assertive with respect to the safety of imported foods from specific regions of the globe, spelling out, among other things, country of origin more clearly and perhaps taking more concrete measures to ensure that food produced elsewhere meets Canadian standards.

- More **visible** than it currently is. This certainly reflects recognition in all of our consumer discussions that participants know less than they should about such matters.

- From a minority, that the Agency adopts an advocacy role to a greater degree than it currently does. This view is apparently tied to a belief that consumers are somewhat vulnerable to businesses that take advantage of loopholes and gaps in the oversight apparatus. These same participants tend to acknowledge that more common mention of businesses being fined and/or having licences suspended would answer to this wish.

Reaction to proposed Agency attributes

Finally, participants were exposed to proposed statements and phrases about the Agency, put to them loosely as indicators of what the Agency might say about its aims, priorities, and ambitions for the future. These provoked mixed reactions:

- "A global leader": This was the least controversial of the phrases, largely because it echoes the widely held presumption among consumers that Canada is already a leader among nations where food safety is concerned. In this sense, this sounds to many ears as if the Agency was simply reiterating its commitment to remaining a leader. A few participants note that while Canada leads many, it is perhaps not the most advanced country and that striving to be an international leader would be a good thing.

- "Trusted partner": Consumers were confused by this, in part because it isn't clear how the Agency/consumer relationship would constitute a "partnership". Conversely, if this is meant to qualify the relationship between Agency and producers, why this would be said to consumers was equally puzzling. The latter was more logically and appealingly framed with the following assertion…

- “Empowered stakeholders”: Although still puzzling to some, this suggests at its root an Agency that affords some power to the various entities that have a stake in what it does. Although some suggest that there might be cause to wonder about the extent of that power, or the circumstances when it is accorded, most concluded that it implies an Agency properly connected and appropriately attuned to the needs of its stakeholders.

- “Intelligent oversight”: A common reaction to this was to qualify it as a “buzz word” or similar attempt to use trendy wording. At best, “intelligent” implies oversight that is made easier by technology or innovation (and which sounds, to most, like a good thing). At worst, “intelligent” implies that the current oversight is perhaps not intelligent, and that the Agency is attempting to raise the bar on its core accountability above a baseline.

- “Enabled workforce”: Here too, the term is positive in its most widely presumed sense, but ambiguous as every day or obvious terminology in a regulatory context. At best, “enabled” suggests a workforce that has been afforded some combination of autonomy, discretionary authority or tools and resources.

- “Agile regulations”: Virtually none of the consumer participants found much to like in this statement. “Agile” seems to suggest “arbitrary” or “context-specific” to many. Others construe it as a commitment to something akin to “intelligent” (see above) regulations, but on the whole, this assertion raised more questions than reassurance.

Business perceptions of the CFIA

The following sections detail our findings relative to the CFIA from the perspective of businesses. Businesses, of course, have a much bigger stake in understanding the CFIA compared to consumers, and of course are subject to varying levels of oversight that predispose them to higher awareness, more informed opinions and, not surprisingly, more critical postures regarding the Agency. On the whole, however, and despite the greater number of complaints, wishes, critiques and the like, both our qualitative and quantitative findings suggest that the relationship between the Agency and the businesses it regulates is largely healthy. This report outlines a lengthy list of complaints and, on occasion, grievances, but these do not contradict the general consensus we found that the Agency and its relations with industry are improving.

Readers should note that the Agency's terminology for differentiated business is used throughout this report. Accordingly, "food line" refers to businesses that transform food from raw form to products that are sold to consumers. In this sense, beef and a beef processor are considered part of the "food" line as soon as the animal crosses the farm or ranch gate but remains a feature or the "animal" line up until it crosses that gate. Similarly, soybeans, for example, are "plant" up until they cross the farm gate and are on their way to processing into tofu and so on. The Agency oversees considerably more businesses in the food line than it does in the plant and animal lines, and this disparity is reflected throughout this report in the incidence of respondents reported. That said, all 3 business lines are considered equally important to the Agency.

Primary CFIA reputation and performance indicators

The following chart displays results relative to the Agency's reputation and performance indicators, namely familiarity, communication, trust, confidence and safeguarding. Not surprisingly, most businesses interviewed have strong familiarity (5, 6, or 7 on a 7-point scale) with the CFIA. The overall score is 72%, 73% for food, 74% for animal and 71% for plant businesses. These findings may reflect a form of "self-selection bias" that increases in potential effect in a voluntary email survey. Business that are more intimately involved with the Agency are more likely to have an interest in matters related to oversight and thus arguably more likely to participate in the survey. Our qualitative discussions with smaller and more isolated food business operators suggest that these sorts of businesses are not so clearly informed about the Agency.

A1: How familiar would you say your company is with the activities of the Canadian Food Inspection Agency (CFIA)?

	1 - Not familiar at all	2	3	4	5	6	7 - Very familiar

Total sample	3%	4%	6%	15%	23%	20%	29%
Food	3%	4%	6%	14%	24%	20%	29%
Animal	2%	4%	4%	16%	26%	22%	26%
Plant	3%	4%	7%	15%	25%	22%	23%

Base: Total sample N=1527, Food N=1372, Animal N=318, Plant N=329

Businesses were asked about the types of communication they have received from CFIA in the past year. Email (58%) is the most recalled method of communication from the CFIA by business in food, animal and plant lines. The next most common source of communication is the CFIA website (46%), which is also consistent across business lines. Personal interaction with a CFIA representative (34%) was the next most recalled method of communication, though higher amongst the animal line (44%).

A2: How has your company received information from the CFIA in the past year?

Source	Total sample	Food	Animal	Plant
Email (including CFIA Listservs)	58%	58%	55%	49%
CFIA website	46%	46%	44%	41%
Personal interaction with CFIA representative	34%	34%	44%	37%
Portal notices in My CFIA	23%	23%	22%	18%
Telephone communications	19%	18%	26%	27%
Through an industry association	15%	14%	20%	22%
Mailed documents	13%	12%	17%	19%
Social media	5%	5%	4%	4%
Not applicable: I have never received information from the CFIA	9%	9%	9%	13%
Other	2%	2%	3%	2%

Base: Total sample N=1527, Food N=1372, Animal N=318, Plant N=329
Note: industry segments are not mutually exclusive

Encouragingly, all methods of communication with the CFIA generate strong rates of understanding (5, 6, or 7 on 7-point scale), with nearly all scores for all listed communication sources being higher than 80% overall and across all lines of business. Personal interaction netted the highest understanding rate (93%) for the total sample, food (92%), animal (90%) and plant (95%). The CFIA website had lower scores (total 79%, food 80%, animal 81%, plant 74%), a topic that is taken up further in this report.

A3: Please indicate the level of understanding that your company has about the information received from the Canadian Food Inspection Agency (CFIA)

	1 – No understanding at all	2	3	4	5	6	7 – Understands completely
Personal interaction with CFIA representative	0%	1%	2%	5%	15%	32%	45%
Telephone communications	0%	0%	2%	9%	18%	32%	38%
Email (including CFIA Listservs)	0%	1%	3%	12%	25%	29%	29%
Mailed documents	0%	1%	4%	9%	23%	34%	29%
Portal notices in My CFIA	0%	2%	4%	14%	22%	29%	29%
Social media	0%	3%	4%	11%	24%	32%	26%
CFIA website	0%	2%	6%	13%	23%	30%	25%
Through an industry association	0%	2%	4%	12%	23%	37%	22%

Base: business; those who received specific communication methods; base size differs by method
Note: industry segments are not mutually exclusive

Qualitative insights

While these quantitative results paint a positive picture of the Agency's communication tools, some business operators complain that the Agency sometimes fails to adjust its communications to the needs of individual businesses or industries. For example, organizations that don't have pre-existing relationships with Agency professionals cite problems reaching expert personnel or bureaucrats with the authority to explain perceived ambiguities in the regulations. They report a consistent pattern of being directed to resources such as "Ask CFIA", a source that is perceived to provide only the text of complicated regulations. Another consistent complaint was that it often takes a very long time simply to identify who in the CFIA has the answer or the authority to answer to a need. These complaints, while expressed by a minority, nonetheless came up across different interviews with association personnel and operators of business in different areas of production of different sizes.

Trust in CFIA to do "what is right" (A4)

As stated in the Statement of Work for this project, "The reputation and credibility of the CFIA are vital to the ability to deliver their mandate. As such, a key part of the CFIA's values is that the Agency's actions, internally and externally, are conducted in a way that trust is preserved." This study shows that a strong majority of Canadian businesses in this sector do trust the CFIA to do what is right. Strong trust scores (5, 6, or 7 on a 7-point scale) overall at 85%, (food 86%, animal 78%, plant 83%) suggest some room for improvement from an otherwise strong foundation.

A4: Please indicate how much your company trusts the Canadian Food Inspection Agency (CFIA) to do what is right

	1 – Do not trust at all	2	3	4	5	6	7 – Trust completely
Total sample	1%	2%	4%	8%	17%	25%	43%
Food	1%	2%	3%	7%	17%	25%	45%
Animal	2%	3%	6%	10%	20%	26%	32%
Plant	1%	2%	6%	8%	20%	29%	34%

Base: business; those who received communication from the CFIA; Total sample N=1382, Food N=1243, Animal N=290, Plant N=287
Note: industry segments are not mutually exclusive

Business confidence in Canadian food safety (A5)

More than half of all business respondents (55%) feel very confident (7 on a 7-point scale) that food sold in Canada is safe. The top 3 box score (5, 6, or 7 on a 7-point scale) shows high confidence across industry segments in the safety of Canadian food (total 94%, food 95%, animal 90%, plant 93%). Food operators, who are quite obviously in a much more informed position and authority to comment, express considerably higher confidence in the safety of Canada's food than consumers. This is a message with the potential to improve the understanding of consumers.

A5: Please rate your company's level of confidence that food sold in Canada is safe. Please provide your opinion even if you are not primarily a food business.

	1 – Not confident at all	2	3	4	5	6	7 – Very confident
Total sample	0%	1%	1%	4%	12%	27%	55%
Food	0%	1%	1%	3%	11%	27%	57%
Animal	0%	1%	1%	7%	12%	28%	50%
Plant	0%	1%	2%	4%	15%	27%	51%

Base: business; those who received communication from the CFIA; Total sample N=1382, Food N=1243, Animal N=290, Plant N=287
Note: industry segments are not mutually exclusive

Confidence in safeguarding of food, plant and animals (A5A)

When the question of confidence is broadened to include the safeguarding of animals and plants, we see a slight decrease in top box confidence, down to 48% very confident (7 on a 7-point scale) from 55% for food only. Looking at the top 3 box rating (5, 6, or 7 on a 7-point scale) for confidence in safeguarding food, plant and animals is very high at 93% of total businesses interviewed (food 93%, animal 90%, plant 91%). Encouragingly, the number of businesses that rated confidence at a 1 or 2 score is negligible.

A5a: Please rate <u>your company's</u> level of confidence that food, plants and animals in Canada are safeguarded

	1 – Not confident at all	2	3	4	5	6	7 – Very confident
Total sample	0%	1%	1%	5%	14%	31%	48%
Food	0%	1%	1%	5%	13%	31%	50%
Animal	1%	0%	3%	6%	15%	32%	43%
Plant	0%	0%	2%	6%	17%	30%	44%

Base: business; those who received communication from the CFIA Total sample N=1382, Food N=1243, Animal N=290, Plant N=287
Note: industry segments are not mutually exclusive

Agency performance in safeguarding safety of food (A6A)

Breaking the question down a little further we asked food industry companies how they think the CFIA is doing with respect to safeguarding food sold in Canada. Food businesses rate the CFIA quite highly at 44% (7 on a 7-point scale) and looking at top 3 box (5, 6 or 7 on a 7-point scale) with an 89% score on the safeguarding of food in Canada. On the face of it, this would suggest that operators have a more informed perspective about threats to food safety beyond the Agency's purview, identifying business stakeholders as a potentially valuable source of insight on where the Agency might focus to improve oversight.

A6a: When it comes to safeguarding the safety of food sold in Canada, how well to you believe the Canadian Food Inspection Agency is doing?

	1 – Not doing well	2	3	4	5	6	7 – Doing well
Food	1%	1%	2%	7%	15%	30%	44%

Base: Business Food N=1372
Note: industry segments are not mutually exclusive

Agency performance in safeguarding safety of plant health (A6B)

Similarly, plant industry businesses rate the CFIA highly (5, 6 or 7 on a 7-point scale) with a score of 84% in safeguarding the health of plants in Canada, however with a lower top box score (7 on a 7-point scale) of 36%.

A6b: When it comes to safeguarding the health of plants in Canada how well do you believe the Canadian Food Inspection Agency is doing?

	1 – Not doing well	2	3	4	5	6	7 – Doing well
Plant	1%	1%	4%	11%	17%	31%	36%

Base: Business; Plant N=329
Note: industry segments are not mutually exclusive

Agency performance in safeguarding safety of animal health (A6C)

When animal industry businesses were asked how the CFIA is doing, some 88% gave a consistently high rating (5, 6 or 7 on a 7-point scale) to the CFIA for its safeguarding of animal health in Canada. They also had a lower top box score than the food industry at only 36% (7 on a 7-point scale).

A6c: When it comes to safeguarding the health of animals in Canada how well do you believe the Canadian Food Inspection Agency is doing?

	1 – Not doing well	2	3	4	5	6	7 – Doing well
Animal	1%	2%	2%	9%	17%	34%	36%

Base: Business; Animal N=318
Note: industry segments are not mutually exclusive

Qualitative insights

Overview of qualitative feedback on the Agency’s reputation

Our qualitative discussions with producers suggest that the CFIA’s reputation varies across producer organizations as a function of how oversight meshes with the operational realities and imperatives of the businesses concerned. Our qualitative discussions show quite clearly how the Agency’s reputation fares better among bigger organizations, and especially ones that have found the resources to adapt in organizational structure and expertise to regulatory oversight. Many of these larger organizations have invested heavily in people tasked to regulatory compliance, made organizational changes to better meet procedural requirements and invested in the development of relationships with key people in the Agency. Conversely, the Agency's reputation tends to be less positive among businesses that have not made these systemic adaptations, or who have not adjusted or cannot adjust as easily whether due to fewer resources or other factors such as organizational culture (for example in long-standing and family-run businesses with more set ways of operating). These shortfalls appear to be more common among start-ups, entrepreneurial or more innovative/emergent organizations. Some of these have concluded that the regulatory burdens are so great as to make certain business configurations and ambitions impractical. Finally, there are transactional and procedural aspects that colour appraisal of the Agency as partner to industry that seem generally operative regardless of business size or orientation.

The following were noted as important aspects of where and how the Agency's reputation is positively regarded. The Agency generally receives praise in the following respects:

- It is credited for being open to input from the industries it regulates by association personnel.

- Trust in the Agency's individual people with whom relationships have been cultivated over years is very high (a perspective noted by association people and operators from very big businesses.) This is especially evident from bigger businesses that have lobbyists or regulatory-focused personnel in Ottawa, and oversight-intensive operators who have come to rely on the informed judgments of inspectors who truly understand the nature of their businesses.

- The Agency is generally credited for being attentive to the evolution of both acts and the regulations in a very rapidly evolving marketplace. The Agency is perceived as reliable in its attempt to "pilot" programs and consult about their suitability.

- The shift to an outcome-based model as opposed to a prescriptive model in the *Safe Food for Canadians Regulations* was described as welcome if not overdue by many.

- Oversight is generally credited for its "corrective rather than punitive" flavour. Businesses prefer an opportunity to voluntarily correct issues with a presumption of goodwill, as opposed to a focus on fines and other more punitive measures. A very small but very vocal number of operators went on at some length about what they felt was insensitive oversight by an arrogant Agency. Some of these same people aired their grievances in the media, underscoring how the number and frequency of problematic relationships can sometimes have a disproportionate “share of voice” regarding the Agency’s reputation.

- Although some businesses feel that coordination with the Agency can be difficult, some see clear signs of not just a desire to improve, but consistent progress on that front. Generally speaking (despite a few very vocal and notable exceptions), even the most critical operators acknowledge that the arc of progress for the Agency is positive. This is reinforced by interventions such as this research process, widely seen as evidence of growing desire within the CFIA to improve things.

- Overall, most association representatives recognize the goodwill and collaborative impulses of the CFIA people they work with.

- And finally, and although not explicitly raised by individual operators, there is clear evidence that the Agency has a good record in balancing its oversight based on varying levels of needs and effectiveness. Even though individual interviewees describe very different levels of interface with the Agency, the vast majority explicitly or implicitly acknowledge that the oversight to which they are subjected matches the relative risk their business poses for food safety. In this sense, the Agency’s long history and deep involvement with the breadth of the food industry appears to have produced valuable institutional intelligence and an equally intelligent allocation of resources.

Qualitative insights

The following sections, summarizing views that were heard with some regulatory and/or from more informed participants articulate some of the ways and reasons why the Agency’s reputation suffers or is more complicated:

1. The CFIA enforces lower standards than many in food industries routinely adhere to.

International regulatory bodies such as the Global Food Safety Initiative, the European Union, the United States Department of Agriculture, even local buyers like Loblaws and other major corporate clients often demand higher food safety standards than those enforced by the CFIA. Not surprisingly, this tends to coincide with the same regulations from the CFIA. That said, for many of these same industries, the CFIA is essential as a facilitator of trade across national borders, as a validator of crop quality and so on. This has the potential to complicate the relationship between producers and the Agency in the sense that producers may care more about what the Agency can do for their business than about food safety in general. (It is also worth noting that some operators complain about the duplicated oversight that occurs between the Agency and provinces, noting that many provinces enforce standards that should logically be recognized as sufficient by the Agency.)

2. The Agency's perceived decrease in size, focus and in-house expertise.

A relatively common view among business operators (and associations) is that the CFIA has been rationalizing its resources, focusing on fewer things and as a result, de-emphasizing some things it has done routinely in the past. This is widely perceived as the by-product of a renewed emphasis on focus on food safety and recognized as decreasing emphasis on other parts of the CFIA's mandate, roles and responsibilities. Some association people see this shift as the Agency's preoccupation with public opinion that occasionally results in over-bearing oversight, excessive control measures and/or inattentiveness to the more facilitating aspects of the Agency's relationship with industry. For example:

- The Agency is perceived to be reducing the number of inspectors (who used to specialize in a fewer number of industries) and to be asking the remaining ones to inspect a greater number of industry types. This is understood as a push to make inspectors more generalist in orientation and is associated with a loss of industry-specific expertise that is cited as a real concern.

- There have been reductions in services such as testing labs which have added significant delays and inconveniences.

- Another perceived by-product is "offloading" responsibilities by the Agency onto the industry associations and advocacy groups. For example, if a shortfall in the regulations or procedures is identified, the CFIA more likely now to ask an industry association to confront, analyse and recommend adjustments, and yet insist on a critical posture vis-à-vis what is recommended. This is occasionally described as a frustrating imposition on associations that struggle with very limited resources that apparently is not always reflected in appropriate appreciation on the part of the Agency.

- Association people point to inconsistent interpretation of regulations and the availability of services across regions. Agency decisions to move or reduce offices, labs and so on are reflected in apparently deficits of expertise and servicing in some parts of the country. For example, the middle parts of the country have very scattered Agency offices. In other places, testing certain products cannot be done without shipping samples to the other end of the country.

- Some worry that CFIA decision makers and even mid-level bureaucrats are increasingly distanced from the day-to-day, on-the-ground realities of the industries they regulate. Some industries and associations have taken to organizing site visits simply to ensure that key people are exposed and educated. Those that have this complaint see it as an important but improving deficit, which suggests that this would be an important thing to track.

CFIA attributes and institutional values

The survey measured responses to various statements to assess how the CFIA is perceived amongst the businesses it regulates. There were no significant differences in agreement scores across business lines. Very encouraging to note are the high levels of agreement (5, 6, or 7 on a 7-point scale) for statements that reference respect, helpfulness and fairness. Statements that scored above 66% were: 'Representatives of the CFIA are respectful in carrying out their duties' (76%), 'Information received from the CFIA is helpful in preventing future non-compliance' (73%), 'Overall, the CFIA is a fair regulatory agency' (73%) and 'Representatives of CFIA are helpful in providing us with information on regulations' (69%).

The CFIA received lower scores of agreement for the statements 'listening to industry views when it comes to understanding specific regulatory priorities' (48% agree) and many also do not think 'The CFIA listens to the industry when it comes to understanding specific innovation and competitiveness needs' (44% agree). While the CFIA scores well for being sensitive to industry specific operational realities, they are not perceived to thoroughly understand needs and priorities relating to regulations, innovation and competitiveness. These are findings largely echoed in our discussions.

A7: Below are a number of statements about the CFIA. For each statement, please indicate your level of agreement on a 7-point scale – T3B (5, 6 or 7)

Statement	**% in agreement (5, 6 or 7 out of a 7-point scale)**
Representatives of the CFIA are respectful in carrying out their duties	76%
Information received from the CFIA is helpful in preventing future non-compliance	73%
Overall, the CFIA is a fair regulatory agency	73%
Representatives of CFIA are helpful in providing us with information on regulations	69%
CFIA is consistent in how they operate within their mandate	61%
CFIA guidance on regulations is clear	59%
The CFIA is properly equipped to manage the complexity of Canada's food, animal and plant supply	58%
CFIA is transparent in how they operate	57%
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	55%
CFIA regulations have been implemented in a way that is fair to all businesses	55%

The decision-makers in my company feel that the CFIA regulations are very complicated	50%
CFIA listens to industry views when it comes to understanding specific regulatory priorities	48%
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	44%
CFIA regulations are too basic for my company to be concerned about	16%

Base: Total sample N=1527

Key drivers analysis

We conducted a driver analysis to measure the relative importance of each of the predictor variables using the attributes at A7, in predicting the outcome variable (familiarity, trust or confidence). As a result, for each measure there is a uniquely important primary driver that the Agency should focus their communication on in order to facilitate building familiarity, trust and confidence in the CFIA among businesses.

The primary driver of familiarity is emphasize respect and fairness (“Representatives of the CFIA are respectful in carrying out their duties (21%) and “Overall, the CFIA is a fair regulatory agency” (10.2%))

CFIA – A7 attribute drivers of A1 familiarity (total sample)	
Statement	**Share of importance (%)**
Representatives of the CFIA are respectful in carrying out their duties	21.0
Overall, the CFIA is a fair regulatory agency	10.2
Information received from the CFIA is helpful in preventing future non-compliance	9.3
Representatives of CFIA are helpful in providing us with information on regulations	8.6
The CFIA is properly equipped to manage the complexity of Canada's food, animal and plant supply chain	8.4
CFIA guidance on regulations is clear	7.6
CFIA is transparent in how they operate	6.9
CFIA regulations have been implemented in a way that is fair to all businesses	6.3
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	5.6

It is easy to have open and honest dialogue with the CFIA about regulatory priorities	4.8
CFIA listens to industry views when it comes to understanding specific regulatory priorities	4.3
CFIA is consistent in how they operate within their mandate	3.9
CFIA regulations are too basic for my company to be concerned about	1.9
The decision-makers in my company feel that the CFIA regulations are very complicated	1.3

In assessing the predictors of trust in the CFIA, the primary driver is again fairness, along with perceptions that the Agency provides assistance with preventing non-compliancy: ("Overall, the CFIA is a fair regulatory agency" 17.9%), ("Representatives of the CFIA are respectful in carrying out their duties" 9.0%), and ("Information received from the CFIA is helpful in preventing future non-compliance" 8.1%) and ("CFIA is consistent in how they operate within their mandate" 8%)

CFIA – A7 attribute drivers of A4 trust (total sample)	
Statement	**Share of importance (%)**
Overall, the CFIA is a fair regulatory agency	17.9
Representatives of the CFIA are respectful in carrying out their duties	9.0
Information received from the CFIA is helpful in preventing future non-compliance	8.1
CFIA is consistent in how they operate within their mandate	8.0
The CFIA is properly equipped to manage the complexity of Canada's food, animal and plant supply chain	7.9
CFIA is transparent in how they operate	7.3
CFIA regulations have been implemented in a way that is fair to all businesses	7.3
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	7.1
Representatives of CFIA are helpful in providing us with information on regulations	6.7
CFIA guidance on regulations is clear	6.6
CFIA listens to industry views when it comes to understanding specific regulatory priorities	6.2

The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	6.1
The decision-makers in my company feel that the CFIA regulations are very complicated	1.4
CFIA regulations are too basic for my company to be concerned about	0.3

Finally, key driver analysis indicates that the CFIA gains the confidence of its business stakeholders by communicating about managing complexity, fairness and transparency (“The CFIA is properly equipped to manage the complexity of Canada’s food, animal and plant supply chain” 25%), (“Overall the CFIA is a fair regulatory agency” 11.8%) and (“CFIA is transparent in how they operate” 9.5%).

CFIA – A7 attribute drivers of A6 confidence (total sample)	
Statement	**Share of importance (%)**
The CFIA is properly equipped to manage the complexity of Canada's food, animal and plant supply	25.0
Overall, the CFIA is a fair regulatory agency	11.8
CFIA is transparent in how they operate	9.5
CFIA guidance on regulations is clear	9.2
Information received from the CFIA is helpful in preventing future non-compliance	8.8
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	7.0
CFIA is consistent in how they operate within their mandate	6.7
CFIA regulations have been implemented in a way that is fair to all businesses	6.6
The CFIA listens to industry views when it comes to understanding specific regulatory priorities	4.3
Representatives of CFIA are helpful in providing us with information on regulations	3.5
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	3.5
Representatives of the CFIA are respectful in carrying out their duties	3.0
CFIA regulations are too basic for my company to be concerned about	0.5

The decision-makers in my company feel that the CFIA regulations are very complicated	0.3

Qualitative insights

Our discussions with business and association personnel reveal how keenly aware they are of the Agency's regulatory power and its insistence on adherence to rules and procedures. While a focus on the rules is expected, the Agency is in some corners faulted for not holding itself to the same standards and rigor it expects of the organization it regulates. Not surprisingly, this has negative implications for the Agency's institutional attributes and reputation, notably with respect to the dimensions of fairness, management of complexity and transparency identified above. Some of the more notable commentary from operators includes:

- Inspectors in this new "generalist" way of working have made errors resulting in penalties, corrective orders and the like. These sanctions are issued with very little flexibility– corrections and fines must be tended to immediately – yet appeals take a very long time to be resolved and are occasionally perceived to meet institutional resistance. We note that those who are aware of the perceived reduction in the Agency's resources noted earlier are often the most irritated with the Agency's errors and slow response times.

- The Agency insists on long periods of time to analyze and stipulate on required regulatory changes but occasionally rushes those changes through without giving the related industries time to weigh in or adjust after the fact. A few participants noted that the Agency has on occasion skipped Canada Gazette publications.

- A reluctance, particularly among middle-level personnel and inspectors to offer interpretation of ambiguous regulatory requirements or instructions. The Agency is faulted occasionally for being very liberal with respect to its own timing in responding to industry (even for things with prescribed delays) while being very intolerant of industry shortcomings or delays.

- For a very small number of operators, the Agency is faulted for what is described as somewhat indisposed to public acknowledgement of its errors or shortcomings or even to express regret for actions taken that have caused undue burdens on operators.

In the context of selecting words from a set list that describe the CFIA as a partner to industry, businesses selected "Respectful" (42%), "Fair" (37%), "Available" (34%) and "Responsive" (32%) which suggests room for improvement on these key influences on its reputation.

A8: Please look at the following list of words, and select the ones that in your view, describe the kind of partner the CFIA is to your industry	
Word	**%**
Respectful	42%
Fair	37%
Available	34%
Responsive	32%
Well-informed	27%
Collaborative	24%
Careful	23%
Aware	22%
Open	21%
Expert	20%
Clear	20%
Sincere	19%
Attentive	19%
Transparent	19%
Controlling	17%
Concerned	17%
Rigid	15%
Willing	14%
Flexible	13%
Honorable	12%
Indifferent	7%
Self-interested	7%
Pragmatic	7%
Punitive	5%
Disinterested	4%
Ignorant	4%
None of the above	6%

Base: Business Total sample N=1527

In another assessment of CFIA activities, between 81% and 85% of businesses agree (5, 6, or 7 on a 7-point scale) that the CFIA works hard so Canadians have safe, high-quality food to feed their families, and that by protecting food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy. 2 in 3 agree that as a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks.

B1 Below are some statements to describe the activities of the Canadian Food Inspection Agency (CFIA). How much do you agree or disagree with each of the following statements? – T3B (5, 6 or 7)

	Total sample	Food	Animal	Plant
The CFIA works hard so Canadians have safe, high-quality food to feed their families	83%	84%	81%	81%
By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy	85%	86%	84%	82%
As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks	66%	67%	63%	63%

Base: Business total sample N=1527, Food N=1372 Animal N=318, Plant N=329
Note: industry segments are not mutually exclusive

It is the experience of 2 in 3 businesses interviewed (64%) that the CFIA is somewhat/very sensitive (4 or 5 on a 5-point scale) to the operational realities of their businesses. This is the case for food (64%), animal (61%) and plant operators (64%) with very little variance across scores by industry. Here too, we see room for improvement in a key driver of the CFIA's reputation with industry, noting, however, that no degree of sensitivity to some industries will alleviate the concerns of those operators who feel they are disadvantaged in this respect.

B8 Based on the experience or perspective of your organization, how sensitive is the CFIA to the operational realities of your specific industry?

	Don't know/not applicable	Very insensitive	Somewhat insensitive	Somewhat sensitive	Very sensitive
Total sample	17%	5%	14%	45%	19%
Food	17%	5%	14%	45%	19%
Animal	14%	9%	16%	47%	15%
Plant	15%	6%	14%	45%	20%

Base: Business total sample N=1527, Food N=1372 Animal N=318, Plant N=329
Note: industry segments are not mutually exclusive

Assessment of CFIA communications and relations with industry

As mentioned previously, when assessing the communication methods and sources used by the CFIA, most food, animal and plant businesses cite email (58%) as the most common mode of communication, followed by the CFIA website (46%) and then personal interaction with a representative (34%). These top 3 communication vehicles also score highly on understanding and satisfaction with businesses. However, in terms of future preference we see that overwhelmingly email is the preferred method of future communication (77%). Telephone communications (30%), personal interaction (28%) and CFIA website (24%) to accompany the primary email communication would work best for most businesses. Communication trends are consistent for each line of business individually.

Total sample	Methods of communication from CFIA (A2)	T3B Understand communication (A3)	T3B Satisfied with communication (B3)	Preferred method of communication (B6)
Email (including Listervs)	58%	85%	84%	77%
CFIA website	46%	81%	72%	24%
Personal interaction with CFIA representative	34%	90%	88%	28%
Portal notices in My CFIA	23%	81%	76%	16%
Telephone communications	19%	93%	84%	30%
Through an industry association	15%	92%	78%	9%
Mailed documents	13%	85%	77%	14%
Social media	5%	67%	68%	3%
Other	2%	22%	58%	0%

In another TURF analysis, the Top 3 box scores (5, 6, or 7 on a 7-point scale) show that the most satisfaction is driven by email (48%), with an incremental 13% coming from the CFIA website and then an additional 8% from personal interaction with representatives. A focus on the top 3 will drive the highest satisfaction with businesses.

Business B3 Satisfaction with Communication - Incremental Reach (T3B%)

Source	Incremental Reach	Cumulative Messaging Reach

Email (including Listervs)	48%	48%
CFIA website	13%	61%
Personal interaction with CFIA representative	8%	69%
Through an industry association	3%	72%
Portal notices in My CFIA	2%	74%
Mailed documents	2%	76%
Telephone communications	1%	77%
Social media	0%	77%

(Base: Total sample)

The overall satisfaction with CFIA communications (5, 6 or 7 on a 7-point scale) shows that just over two-thirds (68%) of businesses are very satisfied with the tools the CFIA uses to communicate. This is consistent across all 3 industry segments.

B2: What is your overall level of satisfaction regarding the communication tools that are used by the CFIA?

	1 – Not at all satisfied	2	3	4	5	6	7 – Very satisfied
Total sample	4%	3%	6%	14%	25%	25%	18%
Food	3%	2%	6%	15%	25%	25%	19%
Animal	6%	4%	8%	14%	26%	24%	14%
Plant	5%	4%	5%	15%	25%	25%	14%

Base: business total sample n=1527, food n=1372, animal n=318, plant n=329
Note: industry segments are not mutually exclusive

Qualitative insights

Our qualitative discussions also reveal how the CFIA's reputation reflects how well or poorly it strikes **balances** and **trade-offs** or how deft it is with respect to the following elements of intra-organizational communication. Most often, the Agency's reputation varies as a function of how well it manages trade-offs…

- Between pre-emptive and reactive oversight where food safety breaches are concerned. Operators appreciate the difficulty of striking this balance, but nonetheless find that compressions sometimes result in solutions that don't always match operator realities.

- Between one-size-fits-all or industry-tailored regulations: For example, live animal transport rules are described as stipulating maximal times that are tailored to the most sensitive animals that cause problems for hardier animal transporters.

- Between imperatives resident in the CFIA's rules on labelling, whether geared to identifying provenance, nutritional content, or the presence of allergens, for example. Some operators and particularly association people note that changes sometimes happen with insufficient attention to how these influence or trigger other requirements (we had several detailed conversations about how much information can be reasonably conveyed in very small spaces.) Several operators and association people explicitly cited a need for greater predictability in this area.

- Traceability is another area where the balances are not always ideal. For example, the Agency is occasionally faulted for hasty increases in the rate and size of inspected lots to reduce the length of time and size of recalls (and so save everyone from exposure and crop loss), but without sufficient regard for the costs and procedural implications for the industry involved. Interestingly, these complaints were seen as more manageable by larger operators endowed with more resources and key contacts in the Agency, but the source of much stronger complaints from smaller, more emergent and more non-traditional operators.

- The CFIA is sometimes perceived as being overly cautious (again – out of concern for public opinion and what are described as "overcooked" prevention measures), which businesses felt resulted in expensive and complicated measures that don't match a reasonable estimation of the risk to food safety.

- Another area where there is a perceived disconnect between current regulations and operational realities is in regard to the labelling requirements - specifically, with labelling requirements that extend to the individual end product. Some participants pointed out that labels on individual tomatoes or cucumbers might seem sensible until one considers that it can take 3 weeks before a salmonella or listeria outbreak is called to attention, by which point any product that has been removed from its shipping crate will have been eaten or become rotten. As such, some businesses felt that this requirement in particular may not be effective in controlling outbreaks.

- It was suggested that the Agency should consider the rapidly evolving marketplace, and the impact that CFIA decisions have on producer operations. Some complain that when under pressure to "do", the CFIA will act hastily and consider the implications and ramifications after the fact.

Finally, we noted a few comments and perceptions about business-to-business communications and procedural matters:

- Some businesses felt that the Agency could improve its transparency. Decisions are perceived to sometimes be made with an insufficient explanation of the objectives the Agency is trying to achieve.

- The Agency sometimes appears to engage in consultations in a manner where it appears that the effort is more for show than to actually make substantive adjustments or gain critical feedback.

- The Agency is perceived as sometimes being slow and even occasionally unresponsive in its follow-up on issues, complaints and recommendations. Some outstanding regulatory projects have been in place for more than a decade. Some standards are still applied long after they have become functionally irrelevant.

- The Agency is perceived by some to be insufficiently protective of Canadian business interests vis-à-vis the US and not attentive enough to its critical role in facilitating exports. The critique is that the Agency fails to "stand up" sufficiently to entities like the United States Department of Agriculture (USDA), doesn't confront inequitable trading rules and sometimes is not involved where it should be.

- Some associations feel that while generally collaborative, the Agency doesn't sufficiently capitalize on the collaborative spirit and sense of shared mission in the industries it regulates.

Recommended new or additional consumer tracking measures

This study points to important new and additional measures to be included in the tracking of the consumer environment. These recommendations reflect recognition that tracking can improve the ways in which consumer's trust in food safety and in the Agency's capabilities might vary as a function of the depth of their familiarity with its work and mandate. To achieve this, new measures are recommended to capture:

- Consumer appraisal of their own familiarity with the Agency's mandate and ongoing activities, including explicit reference to their level of familiarity with the Agency's role in protecting plant and animal health. This first iteration of the tracking questionnaire measures only awareness of these activities.

- A more in-depth and detailed understanding of how consumers understand food recalls. More specifically, new questions about the frequency of recalls (whether generally or concerning the same product types). In addition, querying consumer confidence in the safety of food types recalled in the last 2 years would also provide a valuable proxy indicator of consumer confidence in the Agency's oversight.

- Additional questions are warranted to capture confidence in food imported into Canada. These should identify provenances and imported food types around which Canadian consumers hesitate. This information would inform the need for and content of messaging.

- Additional questions are warranted to capture confidence in food labelling in 2 respects. First, there is a need to measure the perceived clarity of ingredients listed, and consumer confidence that labelling tells them what they think they need to know. Qualitative discussions reveal that there is some doubt about these 2 aspects. Second, there is a need to capture consumer confidence that current labelling requirements reflect the presence of innovative food types and allergens. The latter stems from the qualitative feedback of food allergy advocacy groups and allergy-sensitive consumers.

- Finally, and with the aim of capturing potentially important shifts in consumer values, additional questions are recommended to measure consumer disposition toward expansion of the Agency's oversight of food safety to reflect Canadians' long-term health and the health of the environment.

Recommended new or additional business tracking measures

While a good measure of the insight we draw upon for guidance stems from our broad conversations with business and industry association people, we also reference a study titled "Public Opinion Research to identify segments of industry reachable through compliance promotion campaigns" executed concurrently to develop a compliance-specific segmentation of regulated parties. This segmentation pilot study has highlighted dimensions of business type, maturity, size, location and dispositions in both organization culture and structure that correlate with different compliance postures. The segmentation also highlights aspects of the relationship and communication between the Agency and businesses that are helpful for ensuring that both compliance and reputation are properly maintained.

Additional or new questions are recommended to capture:

- The degree to which regulations and enforcement thereof are appropriate to a given operators' product type, size, relative maturity, geographical location, and available resources.

- Questions about perceptions that regulatory burdens constrain or facilitate business expansion ambitions and planning for the future.

- The degree or presence of structural adjustments made to facilitate compliance

- Elements of organizational culture around regulatory compliance, specifically in reference to the extent to which compliance has been "embraced" or resisted, reflecting a key driver identified in the segmentation study.

- The degree to which regulations and enforcement keep up with evolutions in technology, other regulatory regimes and changes in the consumer marketplace.

- The degree to which regulatory requirements are affecting overall competitiveness, capacity to export or trade across provincial borders.

- Questions about the appropriateness and burdens of documentary oversight

- Questions about inspector understanding of the operating realities and specific regulatory requirements.

- Questions about operator (and perhaps association) perception of accessibility to the Agency's nodes of expertise (how easy it is to access the person who knows) and interpretive authority (how easy it is to access the person who can decide).

- Questions about access to CFIA service points measured both in terms of timeliness and convenience.

Appendices

Sample profiles

Profile of consumer sample (S1, S2, C1, C2, C3, X1-X14)

S1a Would you be willing to indicate in which of the following age categories you belong?

							Age			Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
18 to 24	11%	11%	11%	11%	11%	11%	39% BC	0%	0%	6%	16% A
25 to 34	17%	17%	17%	17%	17%	17%	61% BC	0%	0%	15%	19% A
35 to 44	17%	17%	17%	17%	17%	17%	%	52% AC	0%	14%	20% A
45 to 54	16%	16%	16%	16%	16%	16%	0%	48% AC	0%	16%	16%
55 to 64	17%	17%	17%	17%	17%	17%	0%	0%	44% AB	17%	17%
65 or older	22%	22%	22%	22%	22%	22%	0%	0%	56% AB	32% B	12%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

S2 In which province or territory do you live?

							Age			Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
(1) British Columbia	14%	100%CDE F	0%	0%	0%	0%	14%	14%	14%	14%	14%
(2) Alberta	11%	0%	60% BDEF	0%	0%	0%	11%	13% C	9%	11%	11%
(3) Manitoba	4%	0%	22% BDEF	0%	0%	0%	4% B	2%	6% B	4%	4%
(4) Saskatchewan	3%	0%	17% BDEF	0%	0%	0%	3%	3%	3%	3%	3%
(5) Ontario	39%	0%	0%	100% BCEF	0%	0%	39%	39%	39%	39%	39%
(6) Quebec	23%	0%	0%	0%	100% BCDF	0%	23%	23%	23%	23%	23%
(7) New Brunswick	2%	0%	0%	0%	%	36% BCDE	4%	2%	2%	2%	3%
(8) Prince Edward Island	0%	0%	0%	0%	%	5% BCDE	0%	0%	0%	0%	0%
(9) Nova Scotia	3%	0%	0%	0%	%	43% BCDE	2%	3%	3%	3%	3%
(10) Newfoundland	1%	0%	0%	0%	%	16% BCDE	0%	1% A	2% A	1%	1%
(11) Yukon	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(12) Northwest Territories	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(13) Nunavut	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(14) Outside of Canada	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
(15) Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

C1 Which of the following statements best describes your role and responsibility when it comes to grocery shopping for your family or household?

							Age			Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
(1) I am solely responsible	53%	48%	51%	54%	54%	52%	49%	60% AC	49%	66%	59% A
(2) I share in this responsibility	42%	47%	42%	40%	41%	44%	40%	38%	46% AB	49% B	35%
(3) Somebody else in my family or household looks after groceries	5%	6%	6%	5%	4%	4%	9% BC	2%	4% B	5%	5%
(4) Prefer not to say	1%	0%	0%	1% BF	1% BF	0%	2% C	0%	0%	1%	1%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

C2 Have you recently acquired a new pet?

							Age			Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female

(1) Yes	13%	13%	12%	12%	14%	11%	18% BC	14% C	7%	10%	15% A
(2) No	87%	85%	88%	87%	85%	89%	81%	85% A	93% AB	90% B	84%
(3) Prefer not to say	1%	1% CF	0%	1% CF	1% CF	0%	1%	1%	0%	1%	1%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

X2 What is the highest level of formal education that you have completed?

								Age		Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
(1) Less than a High School diploma or equivalent	3%	4%	2%	2%	3%	4%	3% B	1%	3% B	2%	3%
(2) High School diploma or equivalent	22%	23%	24%	19%	22%	28%	28% B	13%	25% B	20%	24%
(3) Registered Apprenticeship or other trades certificate or diploma	6%	7%	6%	4%	10% DF	4%	3%	6% A	9% AB	8% B	5%
(4) College, CEGEP or other non-university certificate or diploma	23%	19%	24%	22%	26% B	25%	21%	25%	24%	20%	26% A
(5) University certificate or diploma below bachelor's level	7%	6%	7% F	6%	8% F	3%	8%	6%	6%	7%	6%
(6) Bachelor's degree	27%	30% E	26%	31% EF	21%	22%	27% C	34% AC	21%	28%	26%
(7) Post graduate degree above bachelor's level	12%	9%	9%	14% BCE	10%	13%	9%	14% A	12% A	14% B	9%
(8) Prefer not to answer	1%	2% CEF	0%	1% F	0%	0%	1%	1%	1%	1%	1%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

X3 What language do you speak most often at home?

								Age		Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
(1) English	78%	95% E	96% E	95% E	18%	94% E	80%	77%	76%	77%	78%
(2) French	20%	1%	1%	2% C	81% BCDF	6% BCD	17%	19%	22% A	20%	19%
(3) Other	2%	3% F	3% F	3% F	1% F	0%	2%	3%	2%	2%	2%
(4) Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

X4 Which of the following best describes your total household income last year, before taxes, from all sources for all household members?

								Age		Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
(1) Under $20,000	6%	6%	6%	7% F	8% F	3%	10% BC	5%	5%	4%	8% A
(2) $20,000 to just under $40,000	16%	17%	19% D	12%	17% D	17%	18% B	12%	17% B	14%	17%
(3) $40,000 to just under $60,000	15%	16%	15%	13%	17%	20%	17%	13%	16% B	13%	17% A
(4) $60,000 to just under $80,000	15%	13%	12%	15%	18% C	16%	14%	14%	16%	17% B	13%
(5) $80,000 to just under $100,000	15%	16%	15%	16%	14%	11%	16%	16%	13%	16%	14%
(6) $100,000 to just under $150,000	16%	19%	15%	17%	14%	12%	13%	19% A	16%	18% B	14%
(7) $150,000 and above	9%	6%	11% BE	10% BE	6%	6%	5%	13 AC%	7%	10%	7%
(8) Prefer not to answer	8%	8%	8%	9% E	6%	14%	7%	8%	10%	7%	10%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

X5 Are you an Indigenous person?

								Age		Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
(1) Yes	4%	5% E	5% E	4% E	1%	4%	6% BC	4% C	2%	2%	5% A
(2) No	96%	95%	95%	96%	99% BCD	96%	94%	96% A	98% AB	98% B	95%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2502	338	462	973	566	163	701	826	976	1251	1251
Column names	A	B	C	D	E	F	A	B	C	A	B

X6 You indicated that you are an Indigenous person. Please specify the group to which you belong.

								Age		Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
First Nations (North American Indian)	45%	33%	28%	67% BCE	18%	56%	43%	56%	27%	55%	41%
Métis	38%	39%	68% DF	22%	35%	13%	37%	27%	61% B	24%	42%
Inuk (Indian)	9%	15%	4%	5%	30%	0%	13% C	6%	0%	12%	7%
Other (Specify)	10%	14%	0%	9%	18%	31%	8%	11%	12%	8%	10%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	92	18	24	36	8	7	45	32	15	24	68

Column names	A	B	C	D	E	F	A	B	C	A	B

X7 Are you a member of a visible minority group?

							Age			Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
(1) Yes	18%	25% CEF	18% EF	24% CEF	9%	5%	30% BC	21% C	8%	17%	20%
(2) No	82%	75%	82% BD	76%	91% BCD	95% BCD	70%	79% A	92% AB	83%	80%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	2410	320	438	937	558	156	655	794	961	1227	1183
Column names	A	B	C	D	E	F	A	B	C	A	B

X8 You indicated that you are a member of a visible minority group. Please select the box(es) that apply to you.

							Age			Gender	
Column %	Net	British Columbia	Prairies	Ontario	Quebec	Atlantic	Net 18-34	Net 35-54	Net 55+	(1) Male	(2) Female
Black	16%	7%	14%	16% B	27% B	40%	19%	13%	11%	17%	14%
Chinese	33%	47% CE	28% E	35% E	6%	25%	22%	42% A	39% A	34%	31%
Filipino	7%	1%	19% BDE	6% B	3%	25%	10% C	6%	2%	7%	7%
Japanese	5%	10% CEF	2%	5% F	1%	0%	2%	6%	10% A	4%	5%
Korean	2%	3%	1%	3% EF	0%	0%	2%	2%	2%	3%	2%
South Asian/East Indian (including: Indian from India; Bangladeshi; Pakistani; East Indian from Guyana, Trinidad, East Africa; etc.)	17%	15% F	17% F	19% F	11% F	0%	19%	15%	14%	15%	19%
Southeast Asian (including: Burmese; Cambodian; Laotian; Thai; Vietnamese; etc.)	6%	9% F	4%	5% F	6%	0%	7% C	5%	2%	5%	6%
Non-White West Asian, North African or Arab (including: Egyptian; Libyan; Lebanese; Iranian; etc.)	5%	1%	4%	6% B	9%	11%	7%	2%	8%	6%	4%
Non-White Latin American (including: indigenous persons from Central and South America, etc.)	3%	0%	1%	2% BF	13% BCF	0%	4% C	3%	0%	3%	3%
Person of mixed origin (with one parent in one of the visible minority groups)	7%	3%	10% F	6% F	11%	0%	10% B	3%	6%	6%	8%
Other visible minority group (specify)	7%	5% F	8% F	6% F	12% F	0%	5%	6%	13%	8%	5%
Net	100%	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-	100%-
Column population	440	79	79	222	51	8	198	163	79	206	234
Column names	A	B	C	D	E	F	A	B	C	A	B

Profile of business sample (S3, X1-X14)

Specific profiling details of the sample used for the business section of this report is detailed below in table form which outlines the differences across the 3 lines of industry; food, animal and plant. Significance testing is shown by column letters indicating that a value is significantly higher than another at a 95% confidence interval.

S3 What industry segments does your company operate in?

			Industry segment	
Column %	Total sample	Food	Animal	Plant
Net food	90%	100% BC	75%	73%
Net animal	21%	17%	100% AC	31%
Net plant	22%	18%	32%	100% AB
Food preparation	11%	13% BC	10% C	6%
Food importing	31%	35% BC	18% C	10%
Food exporting	17%	19% BC	18% C	10%
Interprovincial trade of food	14%	15% BC	12% C	5%
Food manufacturing	22%	24% BC	17% C	7%
Farming	26%	29% BC	39%	51% B
Food/beverage manufacturing or processing	15%	17% BC	10% C	5%
Meat and poultry slaughter	2%	3%	6% C	2%
Other food	9%	10% BC	10%	9%
Live animal importing (terrestrial or aquatic)	4%	2%	20% AC	4% A
Live animal exporting (terrestrial or aquatic)	4%	3%	17% AC	3%

Animal product or by-product importing	3%	3%	16% AC	2%
Animal product or by-product exporting	2%	2%	12% AC	4%
Live animal domestic management (for example, producers, assembly yards, includes terrestrial and aquatic)	6%	5%	27% AC	12%
Animal product or by-product preparation or manufacture	3%	3%	15% AC	2%
Animal feed	4%	4%	21% AC	6%
Animal transportation	2%	2%	12% AC	6%
Veterinary biologics	1%	0%	3% AC	2%
Other animal	4%	3%	19% AC	6%
Fertilizers and supplements	3%	2%	6% A	12% AB
Forestry products	1%	1%	1%	6% AB
Horticulture (greenhouse, nursery, bulbs, fruit trees, grapevines)	7%	4%	3%	34% AB
Crops (grains, oilseeds)	7%	7%	17%	31% AB
Potatoes	3%	3%	1%	12% B
Seed growing (other than seed potato)	2%	2%	3%	10% AB
Seed establishments/ handling	1%	1%	1%	6% AB
Plant breeding	1%	1%	0%	4% AB
Plant breeders' rights (intellectual property)	0%	0%	0%	2% AB
Invasive species prevention and management	1%	1%	3%	3% A
Other plant	4%	3%	8%	19% AB
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X1 Approximately how many people are employed by your company?

		Industry segment		
Column %	**Total sample**	**Food**	**Animal**	**Plant**
(1) Sole proprietor / just me	12%	11%	13% C	9%
(2) 2 to 9 employees	42%	43%	45%	45%
(3) 10 to 49 employees	28%	28%	25%	29%
(4) 50 to 99 employees	7%	7%	7%	6%
(5) 100 to 499 employees	7%	7%	5%	6%
(6) 500 to 999 employees	1%	1%	2%	1%
(7) 1000 to 4999 employees	0%	0%	0%	0%
(8) 5000+ employees	1%	1%	1%	1%
(9) I don't know / Prefer not to answer	2%	2%	2%	2%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X2 What is the approximate annual revenue of your company?

		Industry segment		
Column %	**Total sample**	**Food**	**Animal**	**Plant**
(1) Less than $100,000	15%	15%	15%	12%
(2) $100,000 to $499,999	18%	19%	17%	19%
(3) $500,000 to $999,999	12%	12%	13%	11%
(4) $1 million to less than $25 million	35%	36%	33%	37%
(5) $25 million to less than $100 million	4%	4%	3%	3%
(6) $100 million or more	1%	2%	2%	2%
(7) I don't know / Prefer not to answer	14%	13%	17% A	18% A
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X3 How long has your company been in operations?

		Industry segment		
Column %	**Total sample**	**Food**	**Animal**	**Plant**

(10) Less than a year	6%	6%	3%	4%
(11) More than 1 but less than 5 years	13%	14% C	10%	8%
(12) 5 or more years but less than 10 years	11%	11%	12% C	6%
(13) 10 or more years but less than 25 years	26%	26%	24%	22%
(14) More than 25 years	42%	42%	49%	57% AB
(15) I don't know/Prefer not to answer	3%	2%	3%	3% A
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X5 In which regions does your company currently do business

		Industry segment		
Column %	**Total sample**	**Food**	**Animal**	**Plant**
British Columbia	29%	28%	26%	28% A
Prairies	33%	32%	42% A	38% A
Ontario	47%	48%	46%	45%
Quebec	30%	30%	20%	28% B
Atlantic	16%	16%	16%	22% B
Territories	4%	3%	4%	4% A
The US	16%	15%	20% A	19% A
Outside of the US or Canada	9%	8%	12% A	11% A
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X6 And in which regions does your company have offices/facilities where CFIA food safety regulations are applicable?

		Industry segment		
Column %	**Total sample**	**Food**	**Animal**	**Plant**
British Columbia	18%	18%	14%	19% A
Prairies	22%	22%	34% AC	28%
Ontario	37%	37%	37%	35%
Quebec	19%	19% B	11%	15%
Atlantic	9%	10%	10%	13%
Territories	0%	0%	0%	0%
The US	5%	5%	5%	4%
Outside of the US or Canada	2%	2%	3%	2%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X7 What is the ownership status of your company?

		Industry segment		
Column %	**Total sample**	**Food**	**Animal**	**Plant**
(1) Publicly-traded	3%	3%	3%	2%
(2) Privately-held	87%	87%	88%	90%
(3) Government / Crown	1%	1%	2% A	2% A
(4) Not sure	9%	9%	7%	6%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X8 Is your company based in Canada, or does it have its headquarters elsewhere?

		Industry segment		
Column %	**Total sample**	**Food**	**Animal**	**Plant**
(1) Headquarters located in Canada	92%	91%	92%	95%
(2) Headquarters located outside of Canada	7%	7%	5%	3%
(3) Not sure	2%	2%	3%	2%

Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X9 What are your company's regular hours of operation?

			Industry segment	
Column %	**Total sample**	**Food**	**Animal**	**Plant**
(1) Weekdays 9am to 5pm	45%	44%	38%	41% A
(2) Monday through Saturday	17%	18% B	17%	20%
(3) Weekdays and weekends	15%	15%	15%	16%
(4) Open 24 hours	8%	8%	16% AC	10%
(5) Other	11%	12% B	11%	10%
(6) Not sure	3%	3%	2%	3%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X10 When is usually your company's busiest time of the week?

			Industry segment	
Column %	**Total sample**	**Food**	**Animal**	**Plant**
(1) Weekdays during the day	77%	77%	79%	78%
(2) Weekdays during the evening	1%	2%	0%	1%
(3) Weekends, during the day	11%	11%	11%	11%
(4) Weekends, during the evenings	2%	2%	2%	2%
(5) Not sure	9%	9%	8%	8%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X11 Which of the following best describes your company's busiest time of the year?

			Industry segment	
Column %	**Total sample**	**Food**	**Animal**	**Plant**
Summer	34%	36% B	29%	38% B
Fall	27%	27%	30%	38% B
Winter	14%	14%	11%	11%
Spring	25%	23%	30%	50% AB
Holiday occasion(s)	13%	14% BC	7%	6%
Consistent year-round	33%	32%	40% AC	29%
Not sure	5%	5%	3%	2%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X12 Would you describe your company as Indigenous managed or owned?

			Industry segment	
Column %	**Total sample**	**Food**	**Animal**	**Plant**
(1) Yes	7%	7% C	5%	3%
(2) No	84%	84%	87%	90% A
(3) Unsure	9%	9%	8%	7%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X13 For statistical purposes only, what is your gender?

Column %	Total sample	Industry segment Food	Animal	Plant
(1) Male	58%	59% B	58%	63%
(2) Female	34%	33%	32% A	29%
(3) Other	0%	0%	0%	0%
(4) Prefer not to answer	8%	7%	10%	8% A
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

X14 Are you a member of a visible minority group?

Column %	Total sample	Industry segment Food	Animal	Plant
(1) Yes	18%	19% BC	12% C	8%
(2) No	72%	71%	78% A	83% AB
(3) Prefer not to answer	10%	10%	10%	9%
Net	100%	100%	100%	100%
Column n	1527	1372	318	329
Column names	A	A	B	C

Statistical analysis definitions

Included here are definitions and explanations of how the TURF and key driver analysis were conducted.

TURF

TURF is an acronym for “Total Unduplicated Reach and Frequency.” It is an optimization algorithm for finding subsets of items/attributes that “reach” the maximum number of respondents possible. In the context of TURF, “reach” can be defined in various ways. For example, it may be defined as ratings of “4” or “5” (for Top 2 Box) on a 5-point scale.

Once reach has been defined, TURF is applied to respondent-level data to analyze reach (and frequency) for all possible subsets of a certain size. The TURF algorithm counts how many respondents are reached by each possible subset and then rank orders the subsets in terms of overall reach. As a result, TURF is typically used to answer questions like, “Which subset of 5 attributes out of 30 is best in terms of maximizing reach?”

The “frequency” part of TURF simply refers to the number of times respondents are reached for a particular combination of items/attributes. If 2 subsets have equal reach, then the subset with higher frequency should be preferred. Accordingly, the TURF algorithm rank-orders subsets in terms of reach first, followed by frequency.

In practice, TURF often reveals multiple solutions with equal or nearly equal reach. At face value, this may seem problematic in terms of identifying an optimal subset. This can also be seen as an opportunity, however, because it allows for other relevant business information to help “break the tie”. For example, if subsets “A” and “B” result in roughly equal reach but subset “A” would be quicker and more inexpensive to implement, then subset “A” should be preferred.

Key driver analysis

The basic problem in a derived relative importance analysis (for example, drivers analysis) is to assess the contribution of each driver’s influence on an outcome of interest. An intuitive way to quantify driver contribution is to use the portion of explained variance (for example., R-squared) attributed to each driver. Variance decomposition techniques, such as LMG and Johnson's Relative Weights, are computationally intensive analyses that are used to measure relative importance in the context of marketing research studies. These techniques define driver "relative importance" as the share of explained variance (for example, R-squared) attributed to each driver in the model.

Questionnaires

Consumer questionnaire

SCREENER

Introductory text:

To take survey in French

The objective of this research is to help the Government of Canada understand the perceptions that Canadians have regarding the safety of food and the protection of plant and animal health in Canada.

This is entirely voluntary, and your responses will remain confidential and anonymous. There is no attempt here to sell or market anything. It will take approximately 10 minutes of your time to complete.

Would you like to participate in our survey?

Contact us for an alternative method to take the survey.

ASK ALL
S1: In what year were you born?

> **[DROP DOWN BOX 1900-2021] → IF 2003-2021, TERMINATE**
> 99. Prefer not to answer

IF RESPONDENT SELECTS "PREFER NOT TO ANSWER" AT S2, ASK S2A:
S1A**:** Would you be willing to indicate in which of the following age categories you belong?

1. Younger than 18 years old TERMINATE
2. 18 to 24
3. 25 to 34
4. 35 to 44
5. 45 to 54
6. 55 to 64
7. 65 or older
8. Prefer not to answer

S2: In which province or territory do you live?

1. British Columbia
2. Alberta

3. Manitoba
4. Saskatchewan
5. Ontario
6. Quebec
7. New Brunswick
8. Prince Edward Island
9. Nova Scotia
10. Newfoundland and Labrador
11. Yukon
12. Northwest Territories
13. Nunavut
14. Outside Canada → **TERMINATE**
15. Prefer not to answer → **TERMINATE**

ASK ALL

S3. Do you have any food allergies or sensitivities? If so, please indicate the severity of these allergies/sensitivities.

COLUMNS

- **Add "No Food Allergies or Sensitivities" button at top**
- **Show 7-point scale**
- **Anchor "Not sensitive or allergic at all" over 1**
- **Anchor "Very sensitive or very allergic" over 7**

ROWS (RANDOMIZE)

1. Cow's milk
2. Eggs
3. Tree nuts
4. Peanuts
5. Shellfish
6. Fin Fish
7. Soy
8. Wheat/gluten
9. Sesame
10. Caffeine
11. Sulfites
12. Salicylates
13. Amines
14. Other (Please specify) ______________________________

MAIN SURVEY

SECTION A – CFIA KEY PERFORMANCE INDICATORS

SECTION INTRO:
Congratulations, you qualify for this study.

ASK ALL – DO NOT SHOW HEADERS Rotate start
UNAIDED AWARENESS
A0F: When you think of organizations in Canada that are dedicated to **food safety**, which organizations come to mind?

> Please type one organization per box for as many organizations as you can think of.

PROVIDE 5 BOXES. RECORD THE ORDER THAT THE BRANDS ARE MENTIONED.
UNAIDED AWARENESS
A0A: When you think of organizations in Canada that are dedicated to safeguarding **animal health and protecting against animal diseases** which organizations come to mind?

> Please type one organization per box for as many organizations as you can think of.

PROVIDE 5 BOXES. RECORD THE ORDER THAT THE BRANDS ARE MENTIONED.

UNAIDED AWARENESS
A0P: When you think of organizations in Canada that are dedicated to safeguarding and protecting **plant health**, which organizations come to mind?

> Please type one organization per box for as many organizations as you can think of.

PROVIDE 5 BOXES. RECORD THE ORDER THAT THE BRANDS ARE MENTIONED.

AIDED AWARENESS
A1[M]: When thinking of organizations that are responsible for **safeguarding the nation's supply of food, animals, and plants**, which of the following come to mind?

RANDOMIZE

1. The Canadian Food Inspection Agency (CFIA)
2. Municipal food safety regulators (e.g. public health inspectors)
3. Provincial food safety regulators (Provincial or territorial government departments)
4. Health Canada
5. Agriculture and Agri-foods Canada
6. Public Health Agency of Canada
7. Private sector businesses

FAMILIARITY WITH CFIA.

The Canadian Food Inspection Agency (CFIA) is dedicated to safeguarding and protecting food, animals and plants, which enhances the health and well-being of Canada's people, environment and economy. Reducing risks to food safety, plant health and animal health are CFIA priorities, and the health and safety of Canadians is a key force behind the design and development of CFIA programs.

ASK ALL

A2: How familiar would you say you are with the activities of the Canadian Food Inspection Agency (CFIA)?

Please use the 7-point scale below for your response. A rating of 7 indicates 'very familiar'. A rating of 1 indicates 'not familiar at all'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Not familiar at all" over 1**
- **Anchor "Very familiar" over 7**

ASK ALL

A3: Where have you seen, heard, or read about the CFIA? Select all that apply

1. Word of mouth (friends, family, etc.)
2. Social Media (not including CFIA Social media)
3. A digital assistant (e.g. Alexa, Siri, Google)
4. Traditional Media (newspapers, TV, radio)
5. Internet (includes internet-based news sites but not social media)
6. Direct contact from CFIA (includes CFIA social media and visiting the CFIA website)

99 Not applicable have not seen, heard or read anything about the CFIA

SELECTING 99 SHOULD UNSELECT ALL OTHER RESPONSES
IF A3 = 6 Ask A3a.

A3a. Select all the following that apply to you:

1. I subscribe to CFIA Food Recall Notices
2. I submitted a food safety or labelling concern
3. I follow the CFIA on a Social Media platform
4. I have visited the CFIA website
5. I have contacted the CFIA by phone
6. I have contacted the CFIA by email or through the website
7. In person interaction with a CFIA employee
8. I have a friend of family member who works at the CFIA **→ TERMINATE**

If A3a is selected, ask A3Ai-A3A.

- **Show 11-point scale (0-10)**
- **Anchor "Not at all satisfied" over 0**
- **Anchor "Very satisfied" over 10**

A3Ai: How satisfied are you that the CFIA issues food recall notices in a timely manner. Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

A3Aii: How satisfied are you with the CFIA handling of the food safety or labelling concern you reported. Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

A3Aiii: How satisfied are you with the CFIA content on social media. Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

A3Aiv: How satisfied are you with the usability of the CFIA website. Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

A3Av: How satisfied are you with the CFIA phone interaction you had. Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

A3Avi: How satisfied are you with the CFIA email or website contact you reported. Use a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied".

ASK A4 IF A3 = ANY EXCEPT 99. IF A3 = 99, SKIP TO A5

A4: Thinking about what you have seen, read or heard, about the Canadian Food Inspection Agency indicate how well did you understand the information?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘understood completely. A rating of 1 indicates ‘not at all’.

COLUMNS

- **Show 7-point scale**
- **Anchor “Not at all” over 1**
- **Anchor “Understand completely” over 7**

ROWS
SHOW SELECTIONS FROM A3

ASK ALL
A5: Please indicate how much you trust the Canadian Food Inspection Agency (CFIA) to do what is right to help ensure that food is safe in Canada?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘trust completely’. A rating of 1 indicates ‘not at all’.

COLUMNS

- **Show 7-point scale**
- **Anchor “Do not trust at all” over 1**
- **Anchor “Trust completely” over 7**

ASK ALL
A6: How much do you trust the Canadian Food Inspection Agency (CFIA) to ensure that food product labels have indications regarding ingredients that may cause allergy/food sensitivity?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘trust completely’. A rating of 1 indicates ‘not at all’.

COLUMNS

- **Show 7-point scale**
- **Anchor “Do not trust at all” over 1**
- **Anchor “Trust completely” over 7**

ASK ALL
A7: Please rate your level of confidence that food sold in Canada is safe.–

Please use the 7-point scale below for your response. A rating of 7 indicates 'very confident'. A rating of 1 indicates 'not at all confident'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Not at all confident" over 1**
- **Anchor "Very confident" over 7**

ASK ALL
A7a**:** When it comes to verifying that food sold in Canada is safe, how well to you believe the Canadian Food Inspection Agency is doing?

A7b: When it comes to safeguarding plant health (regulating pests and invasive species), how well do you believe the Canadian Food Inspection Agency is doing?

A7c: When it comes to safeguarding animal health, and preventing the spread of animal diseases how well do you believe the Canadian Food Inspection Agency is doing?

Please use the 7-point scale below for your response. A rating of 7 indicates 'doing well'. A rating of 1 indicates 'not doing well'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Not doing well" over 1**
- **Anchor "Doing well" over 7**

CFIA BRAND ATTRIBUTES ASSESSMENT (DO NOT SHOW HEADER)

A8. Below are a number of statements about the CFIA. For each statement, please indicate how much you agree or disagree. A rating of 7 means 'Agree completely'. A rating of 1 means 'Disagree completely'.

COLUMNS

- **Show 7-point scale**
- **Anchor "Disagree completely" over 1**
- **Anchor "Agree completely" over 7**
- **Add "Not Sure/Not Applicable"**

RANDOMIZE

1. The CFIA looks out for the best interests of Canadians
2. The CFIA is effective in enforcing food safety regulations
3. The CFIA is an effective organization
4. All businesses are treated fairly by the CFIA
5. Food recalls are an example of the food system working
6. I understand what the CFIA does
7. Getting more information about food, plant or animal safety from the CFIA is easy
8. CFIA regulations are not strict enough
9. Canada is fortunate to have an agency like the CFIA to regulate its food, animal, and plant businesses

SECTION B – CFIA MESSAGE EVALUATION
ASK ALL

B1: Below are some statements to describe the activities of the Canadian Food Inspection Agency (CFIA). How much do you agree or disagree with each of the following statements?

COLUMNS

- **Show 7-point scale**
- **Anchor "Disagree completely" over 1**
- **Anchor "Agree completely" over 7**

ROWS

1. The CFIA works hard so Canadians have safe, high-quality food to feed their families.
2. By protecting Canada's food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy.
3. As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks.
4. The CFIA issues food recall warnings in a timely manner
5. The CFIA works hard to stop damage from invasive species or pests that could threaten Canada's Agriculture sector
6. The CFIA protects consumers from food fraud
7. The CFIA enforces regulations that helps ensure animals are transported humanely

B2. Were you aware that moving untreated firewood from a campground or cottage can spread invasive species?

1. Yes
2. No
3. Not sure

B3. Were you aware (previously to this survey) that the CFIA was responsible for regulating the import of dogs into Canada?

1. Yes
2. No
3. Not sure

B4 Please look at the following list of words, and select the ones that in your view, describe the CFIA

(PLEASE SELECT ALL THAT APPLY):

Indifferent	Attentive	Innovative	Inconsistent	Agile	Outdated
Efficient	Transparent	Ignorant	Informative	Scientific	Fair
Dedicated	Consistent	Diverse	Slow	Helpful	Controlling
Punitive	Caring	Trusted	Responsive	Biased	Inclusive
Flexibl e	Rigid	Cutting edge	Tech forward	Modern	Service oriented

NONE OF THE ABOVE

B4a: Please select what you feel should be the top three most important attributes of the Canadian Food Inspection Agency

Show selections from B4

1.

2.

3.

Lifestyle / Activities

C1. Which of the following statements best describes your role and responsibility when it comes to grocery shopping for your family or household?

1. I am solely responsible
2. I share in this responsibility
3. Somebody else in my family or household looks after grocery shopping
4. Prefer not to say

S3A. Have you recently acquired a new pet?

Yes
No
Prefer not to say

S4A: Which of the following descriptions would you say describe you at least somewhat.

COLUMNS

- **Show 4 columns: "Does not describe me at all", "Describes me somewhat", "Describes me completely", and "Don't Know/Not Sure"**

Foodie
Camper
Cottager
Hobby farmer
Gardener
Nature enthusiast
Hiker
Outdoorsy
Pet owner

DEMOGRAPHICS

The following information is collected for classification purposes only.

ASK ALL
X1**:** Please indicate your gender.

1. Male
2. Female
3. Other
4. Prefer not to answer

ASK ALL

X2: What is the highest level of formal education that you have completed?

1. Less than a High School diploma or equivalent
2. High School diploma or equivalent
3. Registered Apprenticeship or other trades certificate or diploma
4. College, CEGEP or other non-university certificate or diploma
5. University certificate or diploma below bachelor's level
6. Bachelor's degree
7. Post graduate degree above bachelor's level
8. Prefer not to answer

ASK ALL

X3: What language do you speak most often at home? Select all that apply

1. English
2. French
3. Other (Specify) ____________________
4. Prefer not to answer

ASK ALL

X4: Which of the following best describes your total household income last year, before taxes, from all sources for all household members?

1. Under $20,000
2. $20,000 to just under $40,000
3. $40,000 to just under $60,000
4. $60,000 to just under $80,000
5. $80,000 to just under $100,000
6. $100,000 to just under $150,000
7. $150,000 and above
8. Prefer not to answer

ASK ALL

X5. Are you an Indigenous person?
(An Indigenous person is a member of a First Nation, a Métis or an Inuk (Inuit). First Nations (North American Indians) include Status and Non-Status Indians.)

1. Yes (Go to next question)
2. No (Go to question 118)

IF X5 = 1, ASK X6. IF X5 = 2, SKIP TO X7

X6. You indicated that you are an Indigenous person. If you wish to provide further details, please specify the group to which you belong.

1. First Nations (North American Indian)
2. Métis
3. Inuk (Inuit)
4. Other (Specify) ______

ASK ALL
X7. Are you a member of a visible minority group?

A member of a visible minority in Canada may be defined as someone (other than an Aboriginal person) who is non-white in colour or race, regardless of place of birth. For example: Black, Chinese, Filipino, Japanese, Korean, South Asian or East Indian, Southeast Asian, non-white West Asian, North African or Arab, non-white Latin American, person of mixed origin (with one parent in one of the visible minority groups in this list), or other visible minority group.

1.Yes
2.No

IF X7 = 1, ASK X8. IF X7 = 2, SKIP TO X9
X8. You indicated that you are a member of a visible minority group. If you wish to provide further details, please select the box(es) that apply to you. (Mark all that apply.)

1.Black
2.Chinese
3.Filipino
4.Japanese
5.Korean
6.South Asian/East Indian (including: Indian from India; Bangladeshi; Pakistani; East Indian from Guyana, Trinidad, East Africa; etc.)
7.Southeast Asian (including: Burmese; Cambodian; Laotian; Thai; Vietnamese; etc .)
8.Non-White West Asian, North African or Arab (including: Egyptian; Libyan; Lebanese; Iranian; etc.)
9.Non-White Latin American (including: indigenous persons from Central and South America, etc.)
10.Person of mixed origin (with one parent in one of the visible minority groups)
11.Other visible minority group (specify)

ASK ALL
X9: May I have the first three digits of your postal code??

[ALLOW 3 DIGITS FOR ENTRY]
99. Prefer not to answer

Business Questionnaire

Page

Login1

Canadian Food Inspection Agency Agence canadienne d'inspection des aliments (https://www.inspection.gc.ca)

Si vous préférez répondre au sondage en français, veuillez cliquer sur le bouton FRANÇAIS ci-dessus.

Thank you for taking the time to participate in this survey. The objective of this research is to allow you, a CFIA regulated party, to tell us about your perceptions of the CFIA. This survey will help the Agency improve its program delivery and communication with businesses. It is entirely voluntary and responses will remain confidential and anonymous. There is no attempt to market or sell anything. It will take approximately 18 minutes of your time to complete.

All of your responses to the survey will be strictly confidential and will be reported only in the aggregate.

If you get interrupted while doing the survey, you **can click on the same link** to pick up right where you left off.

Customer NAICS code should assign the respondent into one of these 3 groups. Please only show the responses for the respective business line (i.e. food/plant/animal)

S3

What industry segments does your company operate in?

Select all that apply

Food businesses:

- ❑ Food preparation 1
- ❑ Food importing 2
- ❑ Food exporting 3

❑ Interprovincial trade of food

❑ Food manufacturing

❑ Farming

❑ Food/beverage manufacturing or processing

❑ Meat and poultry slaughter

❑ Other (specify)

Animal health businesses:

❑ Live animal importing (terrestrial or aquatic)

❑ Live animal exporting (terrestrial or aquatic)

❑ Animal product or by-product importing

❑ Animal product or by-product exporting

❑ Live animal domestic management (e.g. producers, assembly yards, includes terrestrial and aquatic)

❑ Animal product or by-product preparation or manufacture

❑ Animal feed

❑ Animal transportation

❑ Veterinary biologics

❑ Other (specify)

Plant health businesses:

❑ Fertilizers and supplements

❑ Forestry products

❑ Horticulture (greenhouse, nursery, bulbs, fruit trees, grapevines)

❑ Crops (grains, oilseeds)

❑ Potatoes

❑ Seed growing (other than seed potato)

- ❑ Seed establishments/ handling 26
- ❑ Plant breeding 27
- ❑ Plant breeders’ rights (intellectual property) 28
- ❑ Invasive species prevention and management 29
- ❑ Other (specify) 30 ______________________________

Page SecA

A1

The Canadian Food Inspection Agency (CFIA) is dedicated to safeguarding food, animals and plants, which enhances the health and well-being of Canada's people, environment and economy.

How familiar would you say <u>your company</u> is with the activities of the Canadian Food Inspection Agency (CFIA)?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘Very familiar. A rating of 1 indicates ‘Not familiar at all’.

- ❍ 7 7 Very familiar
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not familiar at all

A2

How has <u>your company</u> received information from the CFIA in the past year?

Select all that apply

- ❑ Mailed documents 1
- ❑ Telephone communications 2
- ❑ Email (including CFIA Listservs) 3
- ❑ Portal notices in My CFIA 4
- ❑ Personal interaction with CFIA representative 5

❑ 6 CFIA website

❑ 7 Social media

❑ 8 Through an industry association

❑ 9 Other (Specify): ______________________________

❑ 99 Not applicable: I have never received or do not remember receiving information from the CFIA (Exclusive)

A3 Show if A2 answered

Please indicate the level of understanding that <u>your company</u> has about the information received from the Canadian Food Inspection Agency (CFIA)?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘understands completely’. A rating of 1 indicates ‘no understanding at all’.

1. Mailed documents (Show if A2 1 Mailed document)
2. Telephone communications (Show if A2 2 Telephone)
3. Email (including CFIA Listservs) (Show if A2 3 Email)
4. Portal notices in My CFIA (Show if A2 4 Portal notices)
5. Personal interaction with CFIA representative (Show if A2 5 Personal interaction)
6. CFIA website(Show if A2 6 CFIA website)
7. Social media (Show if A2 7 Social media)
8. Through an industry association (Show if A2 8 Industry Association)
9. <<A2.specify(9)>> ______________________________ (Show if A2 9 Other Specify)

❍ 7 7 Understands completely

❍ 6 6

❍ 5 5

❍ 4 4

❍ 3 3

❍ 2 2

❍ 1 1 No understanding at all

A4 Show if A2 answered

Please indicate how much <u>your company</u> trusts the Canadian Food Inspection Agency (CFIA) to do what is right?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘trust completely’. A rating of 1 indicates ‘do not trust at all’.

❍ 7 7 Trust completely

❍ 6 6
❍ 5 5
❍ 4 4
❍ 3 3
❍ 2 2
❍ 1 1 Do not trust at all

A5 Show if A2 answered

Please rate your company's level of confidence that food sold in Canada is safe.

Please provide your opinion even if you are not primarily a food business.

❍ 7 7 Very confident
❍ 6 6
❍ 5 5
❍ 4 4
❍ 3 3
❍ 2 2
❍ 1 1 Not confident at all

A5a Show if A2 answered

Please rate your company's level of confidence that food, plants and animals in Canada are safeguarded.

❍ 7 7 Very confident
❍ 6 6
❍ 5 5
❍ 4 4
❍ 3 3
❍ 2 2
❍ 1 1 Not confident at all

A6a

When it comes to safeguarding the safety of food sold in Canada, how well to you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily a food company.

❍ 7 7 Doing well
❍ 6 6
❍ 5 5
❍ 4 4
❍ 3 3
❍ 2 2
❍ 1 1 Not doing well

A6b

When comes to safeguarding the health of plants in Canada how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily a plant company.

- ❍ 7 7 Doing well
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not doing well

A6c

When comes to safeguarding the health of animals in Canada how well do you believe the Canadian Food Inspection Agency is doing?

Please answer even if you are not primarily an animal company.

- ❍ 7 7 Doing well
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Not doing well

A7

Below are a number of statements about the CFIA.

For each statement, please indicate your level of agreement on a 7-point scale where a rating of 7 means “strongly agree”, 1 means “strongly disagree”, and 4 means “neither agree nor disagree”.

1. The decision-makers in my company feel that CFIA regulations are very complicated *
2. CFIA is transparent in how they operate *
3. CFIA is consistent in how they operate within their mandate *
4. CFIA regulations have been implemented in a way that is fair to all businesses *
5. CFIA guidance on regulations is clear *
6. CFIA regulations are too basic for my company to be concerned about *
7. Representatives of CFIA are helpful in providing us with information on regulations *
8. Information received from the CFIA is helpful in preventing future non-compliance *

9. Representatives of the CFIA are respectful in carrying out their duties *
10. Overall, the CFIA is a fair regulatory agency *
11. The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain *
12. The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs *
13. The CFIA listens to industry views when it comes to understanding specific regulatory priorities*
14. It is easy to have open and honest dialogue with the CFIA about regulatory priorities *

Levels marked with * are randomized

- ❍ 7 7 Strongly agree
- ❍ 6 6
- ❍ 5 5
- ❍ 4 4 Neither agree nor disagree
- ❍ 3 3
- ❍ 2 2
- ❍ 1 1 Strongly disagree
- ❍ 99 99 I don't know/Not applicable

A8

Please look at the following list of words, and select the ones that in your view, describe the kind of partner the CFIA is to your industry.

Select all that apply

- ❑ 1 Indifferent *
- ❑ 2 Attentive *
- ❑ 3 Respectful *
- ❑ 4 Disinterested *
- ❑ 5 Concerned *
- ❑ 6 Available *
- ❑ 7 Clear *
- ❑ 8 Transparent *
- ❑ 9 Ignorant *
- ❑ 10 Well-informed *
- ❑ 11 Expert *
- ❑ 12 Self-interested *
- ❑ 13 Collaborative *

❑ Honorable * 14

❑ Aware * 15

❑ Sincere * 16

❑ Pragmatic * 17

❑ Controlling * 18

❑ Punitive * 19

❑ Careful * 20

❑ Open * 21

❑ Responsive * 22

❑ Willing * 23

❑ Fair * 24

❑ Flexible * 25

❑ Rigid * 26

❑ None of the above (Exclusive) 27

Levels marked with * are randomized

Page SecB

B1

Below are some statements to describe the activities of the Canadian Food Inspection Agency (CFIA). How much do you agree or disagree with each of the following statements?

1. The CFIA works hard so Canadians have safe, high-quality food to feed their families.
2. By protecting Canada’s food, animals and plants, the CFIA is contributing to the health and well-being of Canadians, the environment and the economy.
3. As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks.

❍ 7 7 Strongly agree

❍ 6 6

❍ 5 5
❍ 4 4 Neither agree nor disagree
❍ 3 3
❍ 2 2
❍ 1 1 Strongly disagree

B2

What is your overall level of satisfaction regarding the communication tools that are used by the CFIA?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘very satisfied’. A rating of 1 indicates ‘not at all satisfied’’.

❍ 7 7 Very satisfied
❍ 6 6
❍ 5 5
❍ 4 4
❍ 3 3
❍ 2 2
❍ 1 1 Not at all satisfied
❍ 99 Not applicable: I have never received or do not remember receiving information from the CFIA

B3 Show if A2 answered

How satisfied are you with the following existing communication tools used by the CFIA?

Please use the 7-point scale below for your response. A rating of 7 indicates ‘very satisfied’. A rating of 1 indicates ‘not at all satisfied’’.

1. Mailed documents (Show if A2 1 Mailed document)
2. Telephone communications (Show if A2 2 Telephone)
3. Email (including CFIA Listservs) (Show if A2 3 Email)
4. Portal notices in My CFIA (Show if A2 4 Portal notices)
5. Personal interaction with CFIA representative (Show if A2 5 Personal interactions)
6. CFIA website (Show if A2 6 CFIA website)
7. Social media (Show if A2 7 Social media)
8. Through an industry association (Show if A2 8 Industry Association)
9. <<A2.specify(9)>>
   ______________________________ (Show if A2 9 Other Specify)

❍ 7 7 Very satisfied
❍ 6 6
❍ 5 5

❍ 4 4
❍ 3 3
❍ 2 2
❍ 1 1 Not at all satisfied

B4

According to you, what is the criteria by which **your company** assesses the services offered by the Canadian Food Inspection Agency (CFIA)?

Please do not enter personally-identifying information (e.g., name, email address, phone number, mailing address), as anything you enter may be shared with the sponsor of this research.

____

B5

When <u>your company</u> assesses the services offered by the Canadian Food Inspection Agency (CFIA), which are the most important?

Start by selecting the reason that you consider to be most important. If there are other reasons, continue to select all that apply and rank (up/down) in order of importance. Please rank order the top 3.

______ The services are easy to access *
______ The services are easy to understand *
______ I can access all of the services offered by the CFIA in one place *
______ The services offered by CFIA help prevent non-compliance *
______ I can contact a representative for clarification *
______ The CFIA operates and communicates efficiently within the hierarchy of the broader industry association *
______ Other

Levels marked with * are randomized

B5 Other Show if B5 Other in top 3

What is the "Other" service offered that you feel is important?

Please do not enter personally-identifying information (e.g., name, email address, phone number, mailing address), as anything you enter may be shared with the sponsor of this research.

____

B6

How do you prefer the CFIA communicate with you in the future?

❍ 1 Mailed documents *

❍ Telephone communications *
2
❍ Virtual chat from the CFIA website or My CFIA *
3
❍ Email (including CFIA Listservs) *
4
❍ Portal notices in My CFIA *
5
❍ In person interaction with CFIA representative *
6
❍ CFIA website *
7
❍ Social media *
8
❍ Through an industry association *
9
❍ Other (Specify): ______________________________
10
❍ Not applicable: I wish the CFIA would not send me any future communications
99

Levels marked with * are randomized

B7

What is the best place to have more transparent dialogue and discussions with CFIA regulators to better understand specific innovation needs or regulatory priorities?

❍ Dedicated communication portal on the CFIA website to discuss such topics *
1
❍ Dedicated phone number for discussing such topics *
2
❍ Quarterly consultation *
3
❍ Industry Association Events *
4
❍ Other (Specify): ______________________________
5
❍ Not applicable: I wish the CFIA would not send me any future communications
99

Levels marked with * are randomized

B8

Based on the experience or perspective of your organization, how sensitive is the CFIA to the operational realities of your specific industry? Is the CFIA …

❍ 5 Very sensitive
❍ 4 Somewhat sensitive
❍ 3 Somewhat insensitive

❍ 2 Very insensitive
❍ 1 Don’t know / not applicable

B9
Do you have any other opinions or comments that you would like to share about food safety or the CFIA?

OPEN END

Page SecX

X1
The following information is collected for classification purposes only. Please answer the following questions about your company:

Approximately how many people are employed in your company?
❍ 1 Sole proprietor / just me
❍ 2 2 to 9
❍ 3 10 to 49 employees
❍ 4 50 to 99 employees
❍ 5 100 to 499 employees
❍ 6 500 to 999 employees
❍ 7 1000 to 4999 employees
❍ 8 5000+ employees
❍ 9 I don’t know/ Prefer not to answer

X2
What is the approximate annual revenue of your company?
❍ 1 Less than $100,000
❍ 2 $100,000 to $499,999
❍ 3 $500,000 to $999,999
❍ 4 $1 million to less than $ 25 million
❍ 5 $25 million to less than $100 million
❍ 6 $100 million or more
❍ 7 I don’t know/ Prefer not to answer

X3
How long has your company been in operations?
❍ 10 Less than a year
❍ 11 More than 1 but less than 5 years
❍ 12 5 or more years but less than 10 years
❍ 13 10 or more years but less than 25 years
❍ 14 More than 25 years

❍ 15 I don't know/ Prefer not to answer

X5

In which regions does your company currently do business?

Select all that apply

❑ 1 British Columbia
❑ 2 Alberta
❑ 3 Saskatchewan
❑ 4 Manitoba
❑ 5 Ontario
❑ 6 Quebec
❑ 7 New Brunswick
❑ 8 Prince Edward Island
❑ 9 Nova Scotia
❑ 10 Newfoundland and Labrador
❑ 11 Yukon
❑ 12 Nunavut
❑ 13 Northwest Territories
❑ 14 The US
❑ 15 Outside of The US or Canada

X6

And in which regions does your company have offices/facilities where CFIA food safety regulations are applicable?

Select all that apply

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

❑ 12 Nunavut
❑ 13 Northwest Territories
❑ 14 The US
❑ 15 Outside of The US or Canada

X7
What is the ownership status of your company?
❍ 1 Publicly-traded
❍ 2 Privately-held
❍ 3 Government/Crown
❍ 4 Not sure

X8
Is your company based in Canada, or does it have its headquarters elsewhere?
❍ 1 Headquarters located in Canada
❍ 2 Headquarters located outside of Canada
❍ 3 Not sure

X9
What is are your company's regular hours of operation?
❍ 1 Weekdays 9am to 5pm
❍ 2 Monday through Saturday
❍ 3 Weekdays & weekends
❍ 4 Open 24 hours
❍ 5 Other (Specify):
❍ 6 Not sure

X10
When is usually your company's busiest time of the week?
❍ 1 Weekdays during the day
❍ 2 Weekdays during the evening
❍ 3 Weekends, during the day
❍ 4 Weekends, during the evenings
❍ 5 Not sure

X11
Which of the following best describes your company's busiest time of the year?
Select all that apply
❍ 1 Summer

❍ 2 Fall
❍ 3 Winter
❍ 4 Spring
❍ 5 Holiday occasion(s)
❍ 6 Consistent year-round
❍ 7 Not sure

X12

Would you describe your company as Indigenous managed or owned?

❍ 1 Yes
❍ 2 No
❍ 3 Unsure

X13

For statistical purposes only

What is your gender?

❍ 1 Male
❍ 2 Female
❍ 3 Other
❍ 4 Prefer not to answer

X14

Are you a member of a visible minority group?

A member of a visible minority in Canada may be defined as someone (other than an Aboriginal person) who is non-white in colour or race, regardless of place of birth. For example: Black, Chinese, Filipino, Japanese, Korean, South Asian or East Indian, Southeast Asian, non-white West Asian, North African or Arab, non-white Latin American, person of mixed origin (with one parent in one of the visible minority groups in this list), or other visible minority group.

❍ 1 Yes
❍ 2 No
❍ 3 Prefer not to say

t1

Canadian Food Inspection Agency Agence canadienne d'inspection des aliments
(https://www.inspection.gc.ca)

Thanks for completing the survey. If you have any questions you can contact the CFIA using any of the methods on this page.

https://www.inspection.gc.ca/about-cfia/contact-us/eng/1546627816321/1546627838025 (https://www.inspection.gc.ca/about-cfia/contact-us/eng/1546627816321/1546627838025)

Status Code: -1

Discussion guides

SCREENER/DISCUSSION GUIDE OUTLINE

Dates: Commencing January 2021, dates TBD
Client: Canadian Food Inspection Agency (CFIA)
Locations: National: In-depth interviews and Focus Groups with Food, Plant and Animal Organization Professionals on ZOOM

In order to understand feelings and opinions about the CFIA, qualitative research is required with businesses and consumers. Qualitative data will be collected through virtual focus groups and individual in-depth interviews that reflect the diversity of our targeted population.

Research Objectives:

- Gather data on reputation, trust and other brand attributes that allows the Agency to manage and develop the CFIA brand over all business lines.
- Examine thoughts on CFIA messages and brand attributes and service quality
- Measure how stakeholders access and assess CFIA services
- Asses satisfaction with existing communication tools and tactics
- Assess preferred methods of communication for each stakeholder segment

Screener

SPECIAL INSTRUCTIONS TO RECRUITERS:
RECRUIT 4 for 4 to show for In-depth Interviews
RECRUIT 8 for 6-7 to show for Focus groups

Hello/Bonjour: Determine (quickly) if the person answering prefers to speak in English or French and use the appropriate version of this screener.

My name is _______ and I work for Patterson, Langlois Consultants, a research company working on behalf of the Canadian Food Inspection Agency (CFIA). I am looking for someone in your organization to participate in some important research commissioned by the CFIA. The purpose of this research is to better understand how the food industry is experiencing food regulations and views of the CFIA as the regulating agency. Can you help me? I need to speak to the right person in your organization for this research. This would be someone with a thorough understanding of the regulations you comply with and who can speak with knowledge and authority on the subject for your organization. Can you direct me to that person?

LEAVE YOUR CONTACT INFO IF NECESSARY AND REPEAT INTRO AS NECESSARY FOR THE NEW PERSON ONCE CONTACT HAS BEEN ESTABLISHED. Please be mindful of the fact that you are in effect working on behalf of the government.

INDICATE: Male ☐1 Female ☐2 ➔ **A good mix**

INTRODUCTION

Hello, my name is _____ from _________, a research company working on behalf of the Canadian Food Inspection Agency. The point of this research project is to gather opinion from the food industry about regulations and the Federal regulatory agency (the CFIA). If you will, I need 3 or 4 minutes of your time in order to verify if you are the right person for this study. By the way, this is research only – no one will attempt to sell you anything. Participation is strictly voluntary, your answers will remain confidential, and your privacy will be protected. **(PROCEED WITH Q.1)**

Q.1 I got your name by talking to someone who answered the phone. Can I just verify: We are looking for someone in your organization that can speak with knowledge and authority about the regulations you are expected to follow and your organization's experience with the CFIA?

Yes ❑1
No ❑2 ➔ **Would it be possible to speak with that person? (Re-engage or set up a call-back)**

Q.2 Would you be willing to be interviewed on this topic and speak on behalf of your organization?

Not surprisingly, these interviews will be conducted on Zoom and take:

For IDI's with industry association personnel: About one hour with just you and the interviewer.

For focus groups with company personnel: About 90 minutes with the interviewer and up to 7 other colleagues in your industry from around the country (if necessary, reassure: You will not be asked anything of a confidential or competitive nature)

Yes ❑1
No ❑2 ➔ THANK AND END

For focus groups only, ask Q3-Q5, else skip to Q7. Else SKIP TO Q8

Q.3 Can you tell me: How long has your company been in operation?

Less than 1 year	☐1	**THANK AND TERMINATE.**
Between 2 and 5 years	☐2	
5 years or longer	☐3	**GOOD MIX:**
Don’t know / won’t answer	☐9	**THANK AND TERMINATE.**

Q.4 Roughly how many employees work for this organization? (in normal times)

Less than 10	❑1	
Between 10 and 50	❑2	
Between 50-200	❑3	**A good mix**
Over 200	❑4	
DK/NA	❑9	**THANK AND TERMINATE**

Q.5A Do you know what a focus group is?

Yes ❑1
No ❑2 ➔ **CONTINUE TO Q.12**

Q.5B Have you ever participated in a focus group discussion before?

Yes ❑1 ➔ Determine topic and frequency of groups in last 5 years.
Exclude anyone

who has attended five or more studies in the last 5 years, or within the last month.

No ❑2

Q.6 A focus group brings together a small number of people and an independent professional moderator from the research firm (Patterson, Langlois Consultants) whose main role is to solicit the opinions of participants: the topic of discussion will be food regulations and the regulating agency. This research is being done on behalf of the CFIA. There is no intention to sell you a product or to change your views about anything, but rather to gather opinions from the industry to help the CFIA perform its functions better. Participation is strictly on a voluntary basis and the information provided will be administered in strict accordance with the provisions of the Privacy Act. To thank you for your participation, we will give you $250 compensation at the end of the discussion. Could we count on you?

Yes ❑1 ➔ **CONTINUE**
No ❑2 ➔ **THANK AND END**

Q.7 Would you be available to participate in the focus group on _____ at ______?

SKIP TO CONTACT DETAILS

Q.8 Great! The interview will be on Zoom with a professional moderator from the research firm (Patterson, Langlois Consultants) whose role is to solicit your opinions.

Determine that the person is comfortable with Zoom or is willing to use it.

The topic of discussion will be food regulations and the regulating agency. This research is being done on behalf of the CFIA. There is no intention to sell you a product or to change your views about anything, but rather to gather opinions from the industry to help the CFIA perform its functions better. Participation is strictly on a voluntary basis and the information provided will be administered in strict accordance with the provisions of the Privacy Act. To thank you for your participation, we will give you $250 compensation at the end of the interview. Could we count on you?

Yes ❑1 ➔ **CONTINUE**
No ❑2 ➔ **THANK AND END**

CONTACT DETAILS

The discussion will be held on Zoom. Are you comfortable with that?

The discussion will about (1 hour for In-depth interview) (90 minutes for the focus group). Please, be ready 15 minutes prior to the start of your interview. Most importantly, if for any reason you are unable to attend, please call or email us as soon as possible so that we can reschedule or replace you if need be. Although we can accommodate a replacement for you if that's necessary, please inform us beforehand because we cannot do this without screening that person first. PROVIDE NAME, PHONE NUMBER AND EMAIL.

Can I confirm your contact details so we can send you the Zoom link and a reminder?

Name:____

EMAIL: ____

May I please have a phone number where I can reach you ?

House: (_____)-_____-__________ Work: (_____)-_____-__________

THANK YOU!
Your co-operation is greatly appreciated!

RECRUITED BY: ____________________ **CONFIRMED BY:** ____________________

Introduction (20 min.)

1. **Introduction of moderator, name and type of research firm**: (i.e. John representing the marketing research firm Patterson Langlois)

2. **Subject for food business line interviews/focus groups**: We're here to talk about Canada's food safety regulations and the federal food safety regulator, the Canadian Food Inspection Agency (CFIA). The purpose of these discussions is to help the CFIA recognize the different experiences with and perspectives about regulations and the federal regulator in your industry. More specifically, your input from these discussions will be reflected in the questionnaires for quantitative surveys that will be done on a yearly basis to help the CFIA assess its reputation and diagnose those factors that may influence the food industry's compliance with regulations. Your input is important and very much appreciated.

    Subject for animal business line interviews/focus groups: We're here to talk about Canada's animal health regulations and the federal animal health regulator, the Canadian Food Inspection Agency (CFIA). The purpose of these discussions is to help the CFIA recognize the different experiences with and perspectives about regulations and the federal regulator in your industry. More specifically, your input from these discussions will be reflected in the questionnaires for quantitative surveys that will be done on a yearly basis to help the CFIA assess its reputation and diagnose those factors that may influence the animal producer industry's compliance with regulations. Your input is important and very much appreciated.

    Subject for plant business line interviews/focus groups: We're here to talk about Canada's plant safety regulations and the federal plant safety regulator, the Canadian Food Inspection Agency (CFIA). The purpose of these discussions is to help the CFIA recognize the different experiences with and perspectives about regulations and the federal regulator in your industry. More specifically, your input from these discussions will be reflected in the questionnaires for quantitative surveys that will be done on a yearly basis to help the CFIA assess its reputation and diagnose those factors that may influence the plant health industry's compliance with regulations. Your input is important and very much appreciated.

3. **Explanation of the focus group process:**

    - **Conversation recorded:** This conversation will be recorded, but will be used in accordance with the Privacy Act and the Personal Information Protection and Electronics Documents Act.
    - **Voluntary participation**: Participants are free to leave or refuse to participate at any time.
    - **Anonymity**: Although we mean to listen to and use your opinions here, you have a strict guarantee of anonymity. The fact that you participated in this process or what you personally say will not be made public.

- **Disclaimer of observers**: Observers may be on this call and hidden from view. Their presence is to directly hear what you have to say but mostly to ensure that I ask the right questions, cover all of the bases, etc.
- **Role of moderator and participants**: I am here as a professional researcher. I am not a Government employee and I am here precisely because I am neutral and objective. I have no vested interest in how you respond to my questions. I am here to ask questions, not provide answers. You are here to speak for yourselves and your organization.
- **Role of moderator continued**: Although I have done my homework and read up on regulations, I am no expert – please bear with me if I ask naïve questions or ask that you explain things that may seem obvious to you.
- **Expression of opinions**: there are no wrong or right answers, no expectation that you agree.
- **Length**: we will be here about 90 minutes – more if you think it necessary. (60 minutes for in-depth with representatives of industry associations).
- **Assess familiarity with Zoom**. For focus groups: Be aware that having a group discussion on Zoom requires us to use the available features if we want this to go smoothly. Please "raise your hand" using the Zoom feature if you have something to say.

4. **Round-table introduction of participants**: (in-depth for IDI's, more briefly for focus group participants)

- Please start by introducing yourself. Tell us a little about yourself personally before you get into your work and the specific nature of your job.

Probes:

- Length of time in role
- Other jobs or roles played elsewhere or in the food/plant/animal industry
- Are you the only contact for the CFIA and other regulators?
- Adjustments to pandemic, etc.

PART 1: Challenges For Your Industry / Organization (App. 20 min)

Although I have certain topics I need to make sure we cover, what we talk about in this discussion is mostly up to you. Let's start with a simple question: What are the biggest challenges facing your industry? Just so you know, I'm going to keep track of the regulatory things so we can take them all up a little later.

Keeping regulatory issues for later, encourage flow of challenges until run out: Inventory topics and take them up individually.

EXAMPLE PROBES FOR CHALLENGES INDENTIFIED:

- Is this something everyone in your association faces? What is it about this issue that makes it a challenge for everyone? Is it your sense that every business like yours faces this problem? What if you are bigger/smaller, in a different corner of the business, in a different Province, etc.?
- In what other ways does it affect your business? **PROBE**: Impact on costs, competitiveness, ability to export, human resources, etc.?
- How has this changed over the last years, if at all? (query re: above => evolutions in commerce, competitive challenges, nature of opportunities, etc.)
- What changes do you consider temporary versus those that may be time limited due to the pandemic?
- Do you feel these things are stable, changing still? What do you think will have changed 3-5 years from now? (probe pace and breadth of organizational / market change)

PART 2: The CFIA as a Regulator (app 30 minutes)

Moderator note: Take some time to do an inventory of all of the dimensions that colour participants' sense of the CFIA as a regulatory agency.

What are your thoughts on the CFIA – whether it be about the organization as a whole or the people from that organization that you deal with?

ADDITIONAL TOPICS TO BE PROBED IF NOT MENTIONED

- **The focus**: Is the CFIA concerned about the right thing? How well do you feel they balance the needs of Canadians and those of your industry?
- **Do you trust the CFIA as a regulator? [Expand on this question, what attributes go into trust… etc.]**
- How do you (your members) access CFIA services? How do you get the services (digital v. in person)? Do you go to the website? Do you subscribe to email lists, social media?
- **Are you familiar with My CFIA (the digital portal to access licences, and other permissions) – What has you experience been?**
- **What do you see as an ideal way to get CFIA services?**
- **Their flexibility**: Anything to say about – how quickly, how appropriately that have responded to evolutions, be they in the wider economy, the industry, etc? What about how they (the CFIA specifically) has handled things during the pandemic? Note that

the scope of this discussion cannot extend to larger issues or measures the Government of Canada may have taken.

- **Their tone, attitude or demeanor**: How is it working with the CFIA and its representatives? In what ways do you interact with the CFIA? What are their strengths and weakness, how can they improve?
    - How would you describe typical interactions with CFIA employees (probe specifically for interactions with inspectors, politeness, professional, helpful?
- **Are messages professional**? Consistent?
- **Guidance**? How do you find the guidance provided by the CFIA (check on where or how they get guidance?)
- **Impact of messages**, impression, thoughts on brand attributes and service quality

PART 3: Regulatory Challenges (app. 20 minutes)

Re-state list of regulatory challenges: Ok, these are the regulatory topics you brought up earlier. Let's talk about these. If you think of anything else along the way, this would be the time to bring it up.

Explore each topic, discuss at length:

- Is this something everyone in your association faces? Is it your sense that every business like yours faces this problem? What if you are bigger/smaller, in a different corner of the business, in a different province, etc.
- In what other ways does it affect your business? **PROBE**: Impact on costs, competitiveness, ability to export or sell inter-provincially, human resources, etc.?
- How has this changed over the last years, if at all? (**query re: above** => changes in commerce, competitive challenges, nature of opportunities, etc.)
- Do you feel these things are stable, changing still? How do you think it might change 5 years from now?
- Would like to talk about third party certifiers now, (with food, for example Global Food Safety Initiative) Where is the value in third party certifiers? When a choice exists how would companies choose between the CFIA and a third-party certifier. How do you see the market evolving?

ADDITIONAL TOPICS TO BE PROBED IF NOT MENTIONED

- For food business line: Introduction of the *Safe Food for Canadians Regulations* (SFCR) starting in 2019 and being gradually enforced since then for various sectors.
- For animal and plant business lines: Introduction of any new legislation or changes to the regulations they must follow (E.g. Fertilizer regulations or Animal Transport).
- [For associations of Veterinarians] We wanted to ask about the reputation of CFIA as an employer of Veterinarians. What are the main factors that would lead a young vet to join the CFIA? Factors that reduce the attractiveness?

- Follow up for all businesses lines:
    - **Characterization**: What kind of change did this represent?

- **Comprehensiveness**: Is it adapted to the realities faced by your specific line of business? If not, how so:
- **Overall impact and unexpected or unforeseen consequences**: What did you expect from this change in legislation/regulations? Did it deliver positive or negative results? How so and how not? Did anything get unexpectedly worse or better after the introduction of the SCFR/other legislation related to plant or animal health? Please explain?

- Was the regulation adjustment easier or harder than you anticipated? Why?
- Are you satisfied or not with the way these regulations were introduced? Why? Why not?
- In the end, has this proved to be more or less of an improvement than you thought?

Before we end this, allow me to remind you that this is Government research, and that you are entitled to both protection under the Privacy Act, and access to this research once the process has run its course. A report will be available under the Access to Information Act or from Library and Archives Canada. Most of all, please accept my thanks for your time and good will.

TERMINATE