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Inspection Agency

Agence canadienne
d'inspection des aliments

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

Executive summary

Prepared for the Canadian Food Inspection Agency

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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

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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

A handwritten signature in black ink, appearing to be 'P. Langlois', written over a horizontal line.

Principal,
Patterson, Langlois Consultants

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-compliance: ("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.