



Public opinion research with food businesses to support compliance with food safety regulations: 2020-2021

Executive Summary

Canadian Food Inspection Agency

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For more information, please contact the Canadian Food Inspection Agency at:
cfia.enquiriesarchive-archivedemandederenseignements.acia@inspection.gc.ca

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This public opinion research report presents the results of a telephone survey conducted by Quorus Consulting Group Inc. on behalf of the Canadian Food Inspection Agency, with 1,081 businesses in Canada during January and February 2021.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique auprès des entreprises alimentaires à l'appui de la conformité à la réglementation sur la salubrité des aliments : 2020-2021.

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or at:

Canadian Food Inspection Agency
1400 Merivale Road
Ottawa, Ontario
K1A 0Y9

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Executive summary

Background and research objectives

Since publishing the *Safe Food for Canadians Regulations* (SFCR) in Canada Gazette in June 2018, the Canadian Food Inspection Agency (CFIA) has been implementing a phased-in approach for some elements of the regulations. January 2020 marked the beginning of a new phase, implementing regulations for Fresh Fruit or Vegetables businesses. Additionally, July 2020 marked another milestone, in which the regulations were extended to businesses in the Manufactured Foods Sector (MFS), which were not previously federally registered. Given the enforcement of COVID-19 related restrictions, resource limitations for small and micro businesses were a key focus.

The CFIA requested public opinion research to understand the Canadian food industry's views on food safety and food safety regulations, and the impact of the COVID-19 pandemic on the food industry, as well as the growth of e-commerce. This research helped inform the effective implementation, communications and compliance with the SFCR. Specific objectives included gaining a better understanding of industry's awareness, motivations, perceptions and attitudes towards:

- the various roles and responsibilities within the food safety system
- federal food regulations as they apply to online sales
- resource needs and barriers to complying with regulatory requirements, to identify root causes of non-compliance and support compliance promotion communications
- current services, and expectations on future services and programs

The research also gathered feedback on:

- regulatory challenges food businesses faced during COVID-19
- compliance promotion tools and communications products
- the effectiveness of SFCR communications

Methodology

National telephone survey

The research consisted of a national telephone survey with businesses in the food industry in Canada based on a selected list of North American Industry Classification System (NAICS) codes provided by the CFIA. The data was weighted according to the population counts per industry vertical and province as per InfoCanada information. All research was conducted in accordance with the professional standards established by the Government of Canada Public Opinion Research Standards.

Data collection occurred between January 28th and February 25th, 2021. A total of 1,081 businesses participated in the study, with an average completion length of 23 minutes and a response rate of 10% across the sample. For this study, a quota for "Retail Only" businesses was established to minimize the dominance of this segment in the overall

sample. Data was monitored to also ensure that multiple locations from the same franchises were not overrepresented in the sample.

The margin of error of this sample size is +/- 3.0%, 19 times out of 20. The research findings can be extrapolated to the broader audience considering the margin of error associated with this sample size. The margins of error for the results in this study will vary based on a variety of factors. For instance, results for sub-groups with smaller sample sizes will have a higher margin of error.

Focus groups and interviews

The research methodology consisted of 6 online focus groups and 10 online in-depth interviews, with participants in Atlantic Canada, Ontario (both within and outside of the GTA), Quebec, the Prairies and British Columbia. Data collection consisted of online focus groups, each lasting no more than 1.5 hours, and online 1-on-1 in-depth interviews, each lasting no more than 45 minutes.

Participants invited to participate in the focus groups and in-depth interviews were recruited through a combination of random contacts by telephone and through the telephone survey that was conducted as part of this study. For each focus group, Quorus recruited 8 participants to achieve 6-8 participants per focus group. Recruited participants were offered an honorarium of \$150 for focus group participants and \$100 for online in-depth interview participants.

Participants represented a good mix of types of business (for example importers, exporters, manufacturers, retailers), size of business (micro, small, medium and large food businesses) and location.

The recruitment of focus group and in-depth interview participants followed the screening, recruiting and privacy considerations as set out in the Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research.

Food safety activities

In 2021, 74% of businesses very clearly understood the food safety regulations that apply to their foods (provided a rating of 6 or 7 in a 7-point scale to rate understanding). Most of the remaining businesses (20%) gave a rating of 4 or 5, “somewhat clearly” understanding the food regulations.

Qualitative research showed the understanding of the regulations varied depending on the size of the business, mostly because larger businesses have dedicated, and/or more staff assigned to review and coordinate the compliance of the regulations. Therefore, representatives from large businesses felt it was easy to stay on top of changes to regulations.

Participants involved in understanding the food regulations for their business agreed that reading these regulations involves a lot of time, but that, by and large, the regulations are usually easy to understand. There is a sense that the new regulations are quite broad and that they can be subject to interpretation, something many participants did not feel comfortable doing on their own

Participants from small food businesses tended to find it more challenging to stay on top of changes in the regulations, and understanding them as well, mainly because they have just a few people dedicated to playing many roles within the company.

Respondents were presented with a list of various food safety-related measures and were asked to note the ones that applied to their company. The most popular food safety activities included establishing a traceability program (77%), an internal training program on food safety (70%), followed by regularly sending staff on food safety training (52%).

Food safety activities that do not apply to retail-only businesses were presented only to businesses not exclusively in retail. The most popular of these food safety activities among these businesses included having written or documented operating procedures on food safety (76%) and having preventive controls in place in a written plan (66%).

Qualitative research confirmed that the use of technology has been a key factor in the success of complying with the SFCR, especially to trace food, but also to stay on top of regulation changes and updates, and to process new licences. Just being at ease with the use of the Internet seemed to be critical and especially a challenge for older respondents.

Regardless of their participation in a private certification scheme¹, respondents were asked to indicate whether they support the role of private certification schemes in achieving compliance with food safety regulations. More than 4 in 5 respondents (83%) supported the role of private certification schemes, an increase from results observed in 2020 (79%).

Businesses that use a certification system, are part of a quality program, or have hired a consultant had a smooth compliance experience when the SFCR was introduced and came into effect. Certifications and programs mentioned include Global Food Safety Initiative (GFSI), Safe Quality Food (SQF) and the CanadaGAP Program. These certifications are seen as rigorous quality processes at least on par with the regulations required by the CFIA, and therefore participants are confident they comply with the SFCR as well.

*Awareness of the CFIA and the *Safe Food for Canadians Regulations* (SFCR)*

Nearly 9 in 10 businesses were at least somewhat familiar with the CFIA (89%). More specifically, 57% rated their level of familiarity either a 6 or a 7 on a 7-point scale (where 1

¹ Private certification schemes are voluntary systems that set process and product requirements as well as the means of demonstrating conformity with these requirements.

meant not at all familiar and 7 meant very familiar). Another 32% considered themselves somewhat familiar (a rating of 4 or 5).

In 2021 and 2020, all businesses surveyed were asked specifically if they had heard, seen or read something about the *Safe Food for Canadians Regulations* (SFCR). 7 in 10 (70%) respondents were aware of the SFCR, up from 66% observed in 2020.

During the qualitative sessions, awareness of the SFCR was clearly different between large and small businesses. All large businesses were aware and familiar with the SFCR, and therefore the CFIA. Participants from large businesses heard about the SFCR years ago, when it was announced it would take place in 2019 or even earlier. However, awareness of the SFCR among small businesses was lower and dependent on the type of food products they managed or their type of business. For example, several participating small businesses explained they did not have products regulated by the CFIA (or at least they did not think they did), and therefore were not aware of the SFCR, and some were not very familiar with the CFIA.

Among businesses aware of the SFCR, the most common sources of information about the regulations were colleagues and industry events (33%), or the CFIA specifically (28%), followed by general, unspecified online sources (21%), and general government sources (16%).

Businesses that have third-party auditors or consultants (primarily large businesses) rely on these as their source for information on changes or updates to the regulations.

The experience from small businesses was quite different. Most have heard just recently, while others have not heard about SFCR at all. In addition, participants from small food businesses expressed they do not always know how to find out if there have been changes to the regulations or not, other than regularly checking the CFIA website.

Irrespective of whether they had seen, read or heard anything about the new regulations, businesses were asked if they thought the new regulations would apply to their business. Over 7 in 10 (71%) businesses believed the new regulations apply to their business, up from 64% in 2020.

Irrespective of the size of the businesses, participants considered the new regulations to be broader or less specific than previous regulations. A few felt that even when they contacted the CFIA for clarification, the agency did not give specific guidance or regulation interpretation specific to the business, but rather provided more general information which could be frustrating for businesses looking for specificities.

When specifically asked about the three key elements of the SFCR, results reveal that 82% of businesses were aware that the new regulations required most businesses to have

product traceability processes. Awareness decreases to 71% for the written preventive control plan and to 66% for the licence.

Awareness of new SFCR requirements among specific sectors

Among businesses that grow fruit, vegetables or grains, more than half (57%) were aware of the new SFCR requirements introduced for the Fresh Fruit and Vegetable sector on January 15th, 2020.

Among processing or manufacturing businesses whose main product includes confectionary items or processed grain-based foods, nearly two thirds (63%) were aware of the new requirements as of July 15th, 2020.

Confidence in meeting regulations and impressions of the CFIA

Over 8 in 10 businesses (81%) had a traceability process in place that allows them to trace back their food to the company that supplied it.

Businesses not exclusively in retail were asked which of the three SFCR key elements would be the biggest challenge for food businesses. Results were somewhat evenly split, as 29% selected written preventive controls as the biggest food safety challenge, followed by traceability of food products (25%), and 21% selected licensing. In 2021, 25% of respondents indicated none of the key elements would be a challenge for food businesses.

Qualitative research revealed that in terms of the three main elements of the SFCR, licensing was the most well-known process among businesses. The process of renewing a licence was usually seen as easy and clear. Nearly all participants used the My CFIA portal for their licence renewals. As for Preventive Control Plans (PCPs), small food businesses were less aware of this requirement, but those who were aware tended to already have a plan in place. In terms of traceability, one of the more notable challenges for larger businesses was in having small suppliers who were not SFCR compliant, since this could affect their own ability to comply as well.

Another challenging aspect of SFCR, especially for smaller businesses, was the labeling of food products. Many mentioned different labelling issues based on changes to the regulations. There was a lot of confusion as to how these rules have changed and how to apply them.

Roughly 4 in 5 businesses (79%) felt very confident (gave a rating of 6 or 7 on a 7-point confidence scale) that they would meet food safety regulations and requirements if they were to be inspected. As the number of new regulations and requirements increased from previous waves, businesses feeling “very confident” have dropped from 92% in 2019 to the current 79%.

The majority of those who were very confident that they would meet regulations and requirements if they were inspected today attribute this confidence to the fact that they believe they follow the rules and /or comply with regulations (56%). Another 23% were confident because they are inspected regularly / have received positive feedback.

Among those who provided lower confidence ratings (somewhat or not very confident), 29% felt that there is always room for improvement, 28% felt they follow the rules, and 27% were not familiar with all of the current regulations or requirements.

Respondents were asked to specify their level of awareness of the CFIA's establishment-based risk assessment (ERA) on a scale of 1 to 7, where 1 meant nothing at all and 7 meant a great deal. Nearly 1 in 5 businesses (18%) had read or heard a great deal (scores of 6 or 7), while 29% were somewhat aware (scores of 4 or 5).

Roughly half of businesses strongly agreed that the CFIA is fair when inspecting food businesses (52%), that inspections are conducted in a consistent manner (48%) and that inspections follow rigorous logic (47%).

Agreement drops slightly when assessing if information from the CFIA arrives in a timely manner (44%) and that it is easy to understand the guidance provided by the CFIA (40%). Over 1 in 10 respondents agreed that the CFIA is not responsive when asked regulatory questions (15%), and that regulatory guidance is inconsistent (14%).

When asked about their perception of the CFIA during the qualitative sessions, most large businesses said they see the CFIA as the agency that ensures the food produced in Canada is of excellent quality and safe for consumption. They felt the CFIA was doing a very good job at ensuring safe food is produced and available in Canada, and that the inspections were done as regularly as they should be, according to the nature and risk-level of their business. The regulatory guidance provided by the CFIA was also perceived of good value, especially if they had a contact already within the CFIA that could be contacted right away or who could point them in the right direction to get the information needed.

On the other hand, many small businesses perceived the CFIA simply as a regulator and wished they could get more support from the CFIA to be able to comply with the regulations.

Another issue pertained to inspectors. While larger businesses seemed to have the same inspector or team of inspectors in regular contact and doing frequent visits to their business, small businesses expressed they had a different inspector every time the CFIA visited their business. Participants from small businesses noticed some inspectors performed their inspection with the lens of a large business operation, and therefore the interpretation of regulations did not apply.

Many participants highlighted the importance of improving the communication and relationship with inspectors and with the CFIA in general. Overall, participants would like to see the role of the CFIA to be more of a partner or mentor, rather than an external auditor, to be able to work together towards the same goal of food safety. This sentiment was more prominent among small businesses; however, a few large businesses shared this opinion as well.

Impact of COVID-19 pandemic

Canadian food businesses were asked to gauge the impact of the COVID-19 pandemic on a variety of points of interest, including the ability to meet food safety regulations and the effects on business operations.

Nearly a quarter of respondents (23%) described a positive or mostly positive impact on business operations, while 48% felt that business operations were negatively impacted, and 29% felt that their business was operating as usual with no effect.

When businesses were asked about the impact the COVID-19 pandemic had on their business' ability to comply with food regulations, unanimously businesses confirmed there was very little impact. There was some impact seen on general operations given the explicit request to respect public health guidelines. The impact of the pandemic for food businesses was more likely to be seen on revenues. A few businesses mentioned having a reduced client base given that they sold food products to restaurants, and many of these had to shut down for a period of time. Another example of an impact on revenue was the cases where businesses had to close their plant due to a COVID-19 outbreak, or because their business was considered non-essential.

Roughly 1 in 5 (18%) of businesses were forced to close at least a few days, while 82% did not have to shut down for any period of time throughout the pandemic.

Among businesses that closed for any period of time during the COVID-19 pandemic, 38% closed for a few months, 35% closed for a few weeks, and 12% for a few days. 1 in 10 businesses (10%) that closed during the pandemic remain closed but plan to reopen, while an additional 5% were not certain if or when they will be able to reopen.

Among businesses that were forced to close but have since reopened amidst the pandemic, more than half (54%) have reopened with reduced hours of operation compared to the hours worked before March of 2020, 40% have reopened with the same hours of operation, while 6% were operating with longer hours than before the pandemic.

When asked to specify the reason business operations were halted, nearly one third of these businesses (32%) did so to be able to put in place safety precautions, while 29% closed as they were considered non-essential. A reduction in sales forced 27% of

businesses to shut down, while 15% chose to shut down in order to protect both staff and the general public.

Roughly half of businesses (53%) reported experiencing moderate changes to business operations surrounding the COVID-19 pandemic, while 26% described large changes.

Respondents were asked to rate a series of statements surrounding their ability to meet food safety regulations during the COVID-19 pandemic, using a scale of 1 to 7, where 1 meant “do not agree at all” and 7 meant “strongly agree”. Over one third (35%) strongly agreed (scores of 6 or 7) that the CFIA provided clear guidance for rules and regulations, and 34% strongly agreed the CFIA has been flexible in the enforcement of regulations during COVID-19. 1 in 5 respondents (20%) strongly agree that they were struggling to adapt to safety practices due to the pandemic, and 12% strongly agreed that COVID-19 has made it difficult for them to comply with food safety regulations.

Contact with the CFIA

Based on results from 2021, 70% of businesses have had some sort of contact with the CFIA over the past 12 months. The most common interaction with the CFIA over the past 12 months had been to look for information about food safety regulations or requirements on the CFIA’s website (47%). The next most common was requesting a permission, licence registration or certificate (30%), followed by having been inspected (28%), and contacting the CFIA for information on (rather than requesting) a permission, licence or certificate (26%).

Businesses having contacted the CFIA over the past 12 months most often did so through the CFIA website (57%), by contacting the CFIA by email (40%), or by phone (38%). A smaller proportion contacted the CFIA in person (7%), much lower than in recent years, likely due to the constraints of the pandemic. The proportion of those using email has overtaken contact over the phone.

Nearly 3 in 5 respondents (59%) were very satisfied with the overall service received from the CFIA in the past 12 months.

The responsiveness of service, quality of customer service, and high quality of information provided by the CFIA all seem to be key satisfaction drivers. Among those “very satisfied”, 35% provided this rating because the service was seen as responsive, another 35% felt the CFIA was helpful and provides good customer service, and 32% because of the high-quality information the CFIA provided. In addition, 22% of these respondents have had no problems or issues with the CFIA’s service that would otherwise lead them to provide a lower rating.

Those who were the least satisfied especially argue for more information from the CFIA, better customer service, and that it was difficult to keep up with regulations and processes.

Large businesses were more confident in contacting the CFIA, especially because many knew a specific person to contact, or knew how they would be reconnected to the right person. Small businesses on the other hand, tended to not proactively communicate with the CFIA – those who did had to try to find a person to talk to at the CFIA, often unsuccessfully, as the general line did not always have the answer to their questions

A few respondents mentioned receiving e-newsletters from the CFIA. Large businesses seemed more aware of the CFIA e-newsletters. Several participants across the groups would like targeted e-newsletters with information related to their food category(ies) specifically.

My CFIA

The survey also examined awareness and likelihood to use the digital service developed for convenient service delivery, My CFIA. Based on the most recent wave of surveys, nearly 2 in 5 businesses (39%) were aware of the My CFIA portal, with 27% of all responding businesses having used it.

Among the 27% of businesses that had used My CFIA, 70% did so to request a new licence, 55% to renew their licence, 44% to register their business, 32% to obtain a permit, and 23% to obtain an export certificate.

Overall, satisfaction with the portal was positive, as half of users (50%) gave a satisfaction rating of 6 or 7 (on a 7-point scale), and 36% a rating of 4 or 5. Across recent waves, this year's results showed the highest proportion of businesses "very satisfied", likely due to the higher number of respondents who had enrolled and had the opportunity to experience available services.

According to participants who provided a lower satisfaction score for My CFIA (136 businesses in total gave a satisfaction rating from 1 to 5) the most common reason was that the design was not user-friendly (64%). Other reasons provided included that the information was unclear (16%), and that the application process was difficult (13%). Survey participants who provided a higher satisfaction score (134 businesses in total gave a satisfaction rating of 6 or 7), appreciated the user-friendly design (44%), described it as straightforward (23%), found accurate information or the information they needed (18%), and found the platform accessible and with a responsive service (13%).

Businesses that have not used My CFIA were asked to specify which licences or permissions their company had with the CFIA. Over a quarter of businesses (27%) had a Safe Food for Canadians Licence, 17% had another type of licence or certificate, and 11% had a food export certificate. Nearly 3 in 5 respondents who have not used My CFIA (59%) were not sure of which licences or permissions their business had from the CFIA.

Awareness of the My CFIA portal was high among all participants. The portal was well evaluated by participants. Most remember using it, mainly to process new licences, and found this tool made licence renewals easy and quick. A few felt the sign-up process could be streamlined and that the portal could be enhanced if they could use this tool to receive communications and updates from the CFIA.

Information needs from the CFIA

Nearly 1 in 3 businesses not exclusively in retail (36%) strongly agreed that the CFIA takes the needs of businesses into account when developing new information products, and a similar proportion (31%) strongly agreed that over the past 12 months they had spent less time searching for food safety information.

Nearly 2 in 5 respondents (38%) indicate that they did not have any challenges when it comes to finding food safety information. The main challenges for businesses when it comes to finding food safety information were the lack of clear information (13%), the CFIA website not being easy to navigate (8%), as well as going through too much information (7%).

When asked specifically to identify the topics for which information was difficult to find, nearly half (46%) of all respondents felt there was no topic in particular. Some topics identified included food safety topics in general (5%), labelling (5%) and food product information (4%).

More than half of businesses (54%) indicated using the CFIA website when looking for regulatory information, while 35% used the Government of Canada website.

During the qualitative sessions, participants said the CFIA website was a powerful tool, with a lot of pertinent information. This was the main source of information for many businesses, large and small. The CFIA website has been used for a range of purposes, including finding information about licensing, importing or exporting, labeling, regulations and compliance.

Participants recognized all the information for food businesses is available at the CFIA website, however, it has been challenging finding what they need when they need it. The CFIA website was generally perceived as a tool with too many steps to get to the information they needed.

Many large businesses were aware of the licensing interactive tool and had used it. Most found it useful. Irrespective of the size of the business, fewer participants were aware of the preventive control plan and traceability interactive tools. Most thought it was good they existed although they might not use it themselves, mostly because they already have a PCP and/or a traceability program in place. A few participants mentioned a tool with

information about labelling would be a good addition, so that they could easily tell if they need changes to their labels or not.

Regarding the virtual assistant, very few participants had noticed it on the CFIA website, and nearly no one had tried using it. The expectations of this tool were rather low.

Ask CFIA

In 2021, the survey also examined awareness and likelihood to use the newest digital service developed for convenient service delivery, Ask CFIA. Nearly 1 in 5 businesses (18%) were aware of Ask CFIA, with 5% having used it.

Overall, satisfaction with Ask CFIA was positive, as more than 2 in 5 users (44%) gave a satisfaction rating of 6 or 7 (on a 7-point scale), and 38% a rating of 4 or 5.

Among businesses who provided a satisfaction rating of 5 or lower, the main issues were that they felt the information was either unclear or inaccurate (36%) or that the answer they received took too long (24%). Conversely, those with higher satisfaction ratings were mostly praising how accessible and responsive the service was (29%) and that they received accurate information and the answer to what they were looking for (27%).

When asked to describe why they had used the Ask CFIA service, nearly a quarter of users (24%) described a lack of clarity on the information they had found, while more than 1 in 5 (21%) felt that it was a convenient and easy alternative.

Businesses that could not find or were unclear on the information they had found were asked to specify the amount of time they had spent searching online before utilizing Ask CFIA. Over 1 in 3 respondents (37%) spent more than 1 hour searching, while 19% spent 16 to 30 minutes.

The study explored the likelihood to use Ask CFIA in the future among those who were previously unaware of the service. To make sure all respondents had at least some information about the service, businesses not having read, seen or heard anything about Ask CFIA were provided the following overview: Ask CFIA is a digital service to provide industry with one point of entry to ask questions to help you understand and comply with current regulatory requirements.

Based on this description, 43% were very likely to use Ask CFIA in the future and another 29% were somewhat likely.

Not many participants in the qualitative sessions were aware of the Ask CFIA service. Those who had used it had mixed reviews. Some felt it had limited value because it led to receiving more links to go through, and not necessarily the answer they were looking for initially. On the other hand, a few felt they got the information they were looking for.

Social media

The vast majority of respondents (90%) did not follow the CFIA on any social media platforms. Among those who follow the CFIA on a social media platform, LinkedIn was the most popular at 5%, followed by Facebook (4%), Twitter (2%) and Instagram (2%).

Respondents would be interested in seeing social media posts outlining new or updated regulations (14%), industry specific information (6%), all food safety regulations (5%) and product recalls (4%) among others.

Over a quarter of respondents (26%) do not use social media, while another 15% said they would never follow the CFIA on social media.

Similar to the quantitative trend, participants in the qualitative sessions did not follow CFIA in social media. Participants did not express any interest in receiving information from the CFIA or following them in any social media platform.

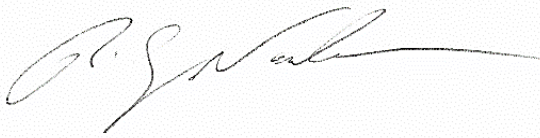
The contract value was \$141,079.08 including HST.

Political neutrality certification

I hereby certify as Senior Officer of Quorus Consulting Group Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the [Policy on Communications and Federal Identity](#) and the [Directive on the Management of Communications - Appendix C](#).

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

Signed:

A handwritten signature in black ink, appearing to read "Rick Nadeau", is written over a light gray, textured rectangular background.

Rick Nadeau, President

Quorus Consulting Group Inc.