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Agence canadienne
d'inspection des aliments

Public Opinion Research with businesses and consumers for the CFIA annual reputation survey: 2021-2022

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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 between February 3rd and March 18th, 2022.

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Signed: Date: March 28, 2022



John Patterson, Principal
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Executive summary

Research Purpose and Objectives

The Canadian Food Inspection Agency's (CFIA) mandate is to safeguard food, animals, and plants to protect the health and well-being of Canada's people, environment, and economy. The Agency designs, develops and implements several programs in collaboration with other stakeholders, such as federal departments, consumer advocacy groups, provincial and municipal organizations, and members of industry. This collaboration around oversight, enforcement activities, acts and policies is necessary to ensure that the Agency adapts appropriately and effectively to rapidly evolving realities in the Canadian market and around the world. These tasks are complex and require the Agency to capture and assess feedback from many sources. The collaboration is also essential to ensure that the Agency spends its limited resources wisely, focusing them where they have the most positive impact on the safety of Canada's food, plant and animal resources.

Finally, and 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 has set up this annual public opinion exercise to measure its reputation among key stakeholders, namely **businesses in the food, plant, and animal sectors**, as well as **Canadian consumers**. The first wave of this study, done in 2021, set "benchmarks" (or initial baseline measures) for the Agency's strategically important indicators. This report presents the result of the second wave of this study, which provides the Agency with an opportunity to reassess its reputation and how it has evolved since the previous year. The results of this research will be used to help the CFIA manage and improve its communication activities, assist in the Agency's strategic planning, as well as inform program, policy, and the delivery of services.

More specifically, the objectives of this study were to:

- Gather data on reputation, trust and other brand attributes that allows the Agency to manage and develop the CFIA brand across all business lines and track these indicators of trust and reputation over time
- 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

Summary of Methodology Used

The 2022 wave of this project was completed in 2 parts, first through a survey with 3,001 consumers via an online panel which took an average of 10 minutes to complete. An online survey was chosen because of its capacity to deliver the survey to a broadly representative sample of Canadians efficiently, and because it is well-adapted to Canadians' communication habits. There are limitations to online panels for generalizing the results to the target population, and caution should be taken when applying inferential statistics.

The second part of this study was completed by surveying 1,499 Canadian businesses (1,291 who consider themselves "food businesses", 302 who consider themselves "plant businesses", and 277 who consider themselves as "animal" businesses), who were emailed invitations sent out from Agency servers with assistance from Advanis Research. These took approximately 19.2 minutes on average to complete. Note that the definitions of "food", "plant, and "animal" businesses are not mutually exclusive: some businesses who answered this year's survey identify themselves as having primary activities in more than one line of business, but all the businesses surveyed in this study have dealings with the CFIA.

Qualitative research was conducted during the research process to help improve the questionnaire, explain the results of the surveys, and assess the Agency's communication tools. With consumers, the work consisted of 8 online (Zoom-based) focus groups composed of 5 consumers each and recruited from across the country. Participants were offered \$150 for their participation in the study as compensation for their time. The incentive was offered to compensate participants for "homework" done prior to the discussions. This work was designed to have them research questions about plant and animal safety from which the CFIA could get a clearer view on how the Agency's website and related tools help shape the Agency's reputation with the public.

Qualitative research with businesspeople was focused on companies that are involved in the growing, breeding or transportation of living plants or animals. A total of 6 focus groups (5 in English and 1 in French) were also conducted online (on Zoom) in which participants were offered \$200 as compensation for their time and effort. Participants for the business groups (5 in each) were recruited by way of emailed invitations to businesses on the Agency's internal lists, with "cold call" recruiting by professional recruiters, and from respondents to the business survey who volunteered to participate.

Qualitative research is used for broadening the understanding of what matters to the target audiences, and to better understand how they think. Qualitative research illustrates the diversity of perspectives among target audiences and reveal issues that were not previously identified or recognized by the research team. That said, the findings from qualitative inquiry are not and should not be construed as statistically representative of the populations involved.

Summary of Key Findings

Consumer perceptions of the CFIA and food safety

Unaided awareness of the CFIA as the organization that is responsible for safeguarding the nation's supply of food, animals, and plants was consistent with last year's research. The number of Canadians who could, unprompted specifically name the CFIA was 10%, that number rises slightly in Ontario to 12% and a little higher in Atlantic Canada to 14%. Aided awareness of the Agency is considerably higher at 68% (down slightly 3 pts from last year's study). 16% answer that they are familiar with the activities of the CFIA (also down 3 pts from last year). Consistent with previous research, 77% of Canadians have strong confidence in the safety of Canada's food supply. Results show a modest 4 point increase this year in Canadians (70%) with 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.

Qualitative discussions with consumers added substance and validity to these survey results, and also confirm what was found last year, namely that Canadians' trust is based on very limited understanding of the scope, breadth, or complexity of the Agency's oversight, and more on general faith in government. This suggests that the CFIA has an opportunity to communicate with the public more and in more detail about what it does. Participants themselves acknowledge that they both want and should know more, and that their trust would be even stronger if they did.

Consumer perceptions of the CFIA brand

Consumers associate the CFIA Brand with similar attributes as last year, although somewhat less strongly. The strongest associations were "Food recalls are an example of the food system working" 73% (down 3 pts from last year), "The CFIA looks out for the best interests of Canadians" 67% (down slightly more, declining 8 pts) and "The CFIA is effective in enforcing food safety regulations" 63% (down 4 pts).

Consumers were asked to what extent they agree with a series of statements, 3 of which were asked in last year's survey, as well as 4 new ones. Most consumers remained in agreement with the 3 statements asked last year, although levels dipped somewhat:

- “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” 75% (same as last year)
- “The CFIA issues food recalls in a timely manner” 68% (down 5 pts)
- “The CFIA enforces regulations that helps ensure animals are transported humanely” 64% (down 3 pts)

These 4 new statements were also met with considerable agreement:

- “As a science-based regulator, the CFIA is believable when it issues a statement” 70%
- “The CFIA enforces regulations that help ensure Canada's plant resources are protected” 68%
- “CFIA enforcement activities are strong enough to encourage companies to comply with the regulations” 64%
- “CFIA helps to facilitate international trade” 60%

The qualitative discussions suggest that the levels of agreement with the statements remain consistent and even when there are slight dips in agreement with last year, they are not likely a reflection of recent events or CFIA communications, given that most consumers are not overly knowledgeable about the Agency. 9 of 10 are unable to identify the Agency, and even fewer report any detailed knowledge about what is done to ensure food, plants and animals are safe guarded. In short, the broad agreement seen with these statements reflects positive presumptions on the part of Canadians.

Key consumer drivers

A key drivers analysis indicates the relative importance of familiarity, trust, and confidence (predictor variables) by analysing the level of agreement with a variety of questions about the CFIA. For each of these 3 key predictor variables, there are several important drivers that the Agency can emphasize in their communications to build consumer familiarity, trust, and confidence in the CFIA.

Similar to last year, results demonstrate that the most important drivers of Agency familiarity are:

- communication to help consumers understand what the Agency does,
- providing them with additional ways to access information about the CFIA.

The top drivers of Agency trust also remain consistent with last year’s results:

- driving perceptions that CFIA is “looking out” for the best-interests of Canadians,
- has an effective system in place to ensure food safety is the most important factor in driving Agency trust.

Confidence in the CFIA is driven by:

- consumers' understanding of the Agency's mandate,
- their understanding that food recalls are evidence of the enactment of that mandate.

Business perceptions of the CFIA

As was the case last year, the qualitative and quantitative findings suggest that perceptions of the Agency among the businesses it regulates are largely positive. Food, plant, and animal businesses have considerably more interaction with the Agency than consumers do, and the oversight that they are subject to informs their perspective. Although the research found some complaints (and some significant ones), it nonetheless found evidence that the Agency's reputation with the businesses it regulates remains largely positive and is improving over time. There are clear signs that perceptions of the Agency are generally improving, but not with all businesses.

There is evidence of increased familiarity with the Agency relative to last year, testifying to improved communication: 81% of the businesses overall are familiar (compared to 72% last year), varying very little across business lines (82% for food, 81% for animal and 80% for plant businesses, respectively). Additionally, the results show strong endorsement of the CFIA's safeguarding of food (88%), plant health (88%) and animal health (80%) as assessed by business respondent.

Discussions with businesspeople suggest progress on several fronts – those with long-standing and generally involved relationships with the Agency point to improvements, notably in progress toward increasingly digitized and efficient web-based servicing, rationalization of inspection requirements and continued good relations with individual Agency personnel. Some issues were noted in adjusting to evolving regulations, but even here, these more involved participants indicated that things were being handled “as well as could be expected”. The participants who fall outside this set of bigger, core industries, however, were more likely to report issues communicating with the Agency and getting their specific issues resolved. Some of these businesses reported issues severe enough to diminish their competitiveness, their ability to exploit new opportunities, and even their continued survival.

Businesses' perception of Agency attributes and values

Businesses were asked to evaluate how the CFIA is perceived across several attributes. On most attributes, food and plant businesses gave higher scores than animal businesses did. High levels of agreement were noted for statements that reference respect, helpfulness, and fairness. The CFIA received lower scores for the statements related to relative performance of the CFIA compared to food inspection agencies in other developed countries, and less than half of businesses agreed that the Agency listens to their industry when it comes to understanding specific innovation and

competitive needs.

Key drivers for businesses

A key driver analysis was also conducted to predict the most important drivers of Agency familiarity, trust, and confidence among businesses. Results are similar to last year, where the top attributes that drive familiarity are related to having respectful interactions with the agents of the CFIA, having the CFIA act as a “fair” regulatory Agency, and the ability to have open and honest dialogue with the Agency about regulatory policies. In terms of driving Agency trust among businesses, the primary driver is perceived “fairness”, followed by “transparency” in their operations, and “sensitivity” to the specific needs of businesses.

Regulated businesses’ appreciation of Agency communications

When it comes to the way that the CFIA interacts with the business community, some preferences remain consistent with last year. For example, email is the most recalled method of communication from the Agency by business across all business lines, up considerably from last year, and respondents who received emails were generally happy with the quality of communications. Usage of the CFIA website and portal notices in My CFIA were the next highest-ranking methods of recalled communication from the Agency.

Looking at the satisfaction of businesses with communication from the CFIA shows that email communications account for the largest measure of business satisfaction with the Agency: further communication appears to add only marginally thereafter. The next most significant drivers of Agency satisfaction are personal interaction with CFIA representative and receiving mailed documents, both of which provide only minor improvements in satisfaction with the CFIA.

Enhancing the CFIA’s Reputation

Among consumers

The biggest opportunity to improve CFIA reputation among Canadians is to better educate them about the scope of the Agency’s mandate: many Canadians do not understand the full scope of what the Agency does and are generally confused about the responsibilities and accountability of individual government agencies. This lack of awareness highlights opportunities for the CFIA to provide Canadians with additional ways to access information. The Agency can increase trust among Canadian consumers by encouraging use of its communications tools (some of which, such as podcasts, appear to be under-used) to keep them informed about that the CFIA is the Agency responsible for the safety of the Canadian food, plant and animal supply and about all the work taking place to achieve that goal. Finally, the CFIA may have opportunity to

boost the already high level of confidence of Canadian consumers by emphasizing the Agency's mandate, and to cement the already existing feeling that food recalls are evidence that the CFIA's systems are functioning properly.

Among businesses

Unlike consumers, businesses that interact with the CFIA are already very familiar with the Agency and are generally supportive of its mandate and confident in its operations. This research points to opportunities to improve communications about the benefits of the Agency's efforts in digitization of its communications and processes. The qualitative discussions found that some businesses – generally those who experience lower levels of oversight and less frequent interactions – have complaints about the CFIA's ability to communicate with them about their specific needs, and that it is becoming increasingly harder to find resolutions to their specific issues. These businesses tend to be unsatisfied with using the Agency's recently implemented digital processes (because they are arguably too complex for their needs), and are increasingly frustrated by perceived changes in the CFIA that seem, to them, to be making the sorts of quick, person-to-person contact they seek impossible. These findings suggest that the Agency may find opportunity to improve its reputation by instituting solutions that are more appropriate for businesses of this type.

Finally, the data suggest that the Agency may be able to enhance its reputation by focusing on 3 qualities in its communications with businesses: respectful interactions, fairness, and transparency. This last element has consistently emerged as essential to fostering goodwill among businesses if the Agency makes a mistake.

Project Budget

The total cost to conduct this research was \$207,277.17, including HST.

Full Research Findings

Consumer Perceptions of the CFIA and Food Safety

Awareness of the CFIA

Consumers were asked to identify which organizations in Canada are tasked with food safety without any prompts (unaided awareness), and the number of Canadians who could specifically name the CFIA remained the same as last year (10%), a number that rises slightly in Ontario to 12% and is a little higher in Atlantic Canada at 14%. When asked specifically about animal health and plant health, the awareness numbers for CFIA are lower; only 2% cited CFIA as the organization tasked with animal health vs 3% last year, and 4% as the organization tasked with plant health (same as last year). When prompted, Canadians have moderate aided awareness of the CFIA overall (68%), which is down slightly from last year (71%). This rate is lower amongst the younger generation under age 35 (55%) and significantly lower among Quebecers (57%).

Similar to last year, half of Canadians (49%) are aware that moving untreated firewood from a campground or cottage can spread invasive species. 1 in 4 (24%) are aware that the CFIA plays an important role in preventing the spread of pests such as Japanese beetle in Vancouver and Emerald Ash Borer in Eastern Canada.

Interestingly, only 1 in 7 (13%) Canadians are aware that the CFIA is responsible for regulating the importation of dogs, and pet owners over-index in this regard. These awareness levels match last year's survey.

Familiarity and sources of awareness

Only 1 in 6 (16%) consumers consider himself to be very familiar (5, 6 or 7 on a 7-point scale) with the activities of CFIA, which is slightly lower than what was observed last year, consistent across regions. Those under age 35 tend to have somewhat higher levels of familiarity (22%) versus those 35-54 (17%) and 55+ (11%). While familiarity is low among consumers, 1 in 4 (26%) recall seeing/hearing about the CFIA through traditional media, and another 1 in 6 (17%) recall information via the Internet. Half of consumers (51%) have no recall of hearing or seeing anything related to the CFIA in 2022. This is different from last year, when more consumers recalled hearing or seeing CFIA material or information (only 1 in 3 consumers did not recall seeing or hearing CFIA material or information last year).

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

N/A	51%
Traditional media (newspapers, TV, radio)	26%
Internet (includes internet-based news sites but not social media)	17%
Word of mouth	13%
Social media (not including CFIA social media)	8%
Direct contact from CFIA (includes CFIA social media and visiting the CFIA website)	4%
A digital assistant (for example, Alexa, Siri, Google)	2%
Podcasts	2%

Base: consumer total N = 3001

The following chart illustrates varying rates of comprehension of CFIA related information absorbed from different sources. The source of information with the highest comprehension rate was Podcasts (87%), though it had lowest recall overall. Not surprisingly, understanding of information about the CFIA is highest (79% combined 5, 6, or 7 scores on a 7-point scale) when contact is direct with the Agency. Other sources of information like the internet (excluding social media), traditional media, and digital assistants (for example, Alexa, Siri, or Google) all provide clear information about the CFIA for those who recall seeing messaging: more than 70% agree that this communication is easy to understand. Information coming from social media was considered less clear (67%), and interestingly, the clarity of information via “word of mouth” (69%) is lower than most digital sources. Our qualitative discussions suggest this is simply a reflection of how businesspeople tend to reach out for person-to-person help when they can’t find information online, or when they encounter unusual situations.

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	T3B - Rated 5,6,7
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Podcasts	0%	0%	3%	11%	42%	24%	21%	87%*
Direct contact from CFIA (includes CFIA social media and visiting the CFIA website)	1%	1%	5%	15%	23%	24%	31%	79%
Internet (includes internet-based news sites but not social media)	1%	1%	4%	18%	30%	24%	22%	76%
Traditional media (newspapers, TV, radio)	1%	1%	7%	18%	33%	21%	19%	73%
A digital assistant (for example, Alexa, Siri, Google)	0%	3%	5%	21%	31%	25%	15%	71%
Word of mouth	1%	1%	8%	20%	35%	17%	17%	69%
Social media (not including CFIA social media)	2%	1%	7%	24%	26%	19%	21%	67%

*Caution base <50

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

Please note that the acronym "T3B" is used throughout this report to identify where respondents have selected a score of 5, 6, or 7 on a 7-point scale.

Of the 49% of Canadians who report having seen/heard or read about the CFIA, the majority (58%) report visiting the CFIA website. Lower proportions of respondents subscribe to food recall notices (14%) and even fewer (11%) follow the CFIA on social media. This data suggests that impressions of the CFIA are being shaped to a considerable extent by the Agency's webtools.

A3a: Select all the following that apply to you:

I have visited the CFIA website	58%
I subscribe to CFIA food recall notices	14%
I follow the CFIA on a social media platform	11%
I have listened to the Inspect and Protect podcast	9%
I submitted a food safety or labelling concern	7%
In person interaction with a CFIA employee	6%
I have contacted the CFIA by email or through the website	6%
I have contacted the CFIA by phone	3%
I subscribe to the Chronicle 360	2%

Base: Consumers who recall seeing/ hearing reading about CFIA n = 1465

Satisfaction with CFIA

Satisfaction scores with specific forms of information from 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” (51%) followed by “the CFIA’s handling of the food safety or labelling concern you reported” (50%) and then 46% for “CFIA phone interaction you had.”

A3ai Show if A3a Level 1 through 8 selected											
Using a scale of 0-10 where 0 is “not at all satisfied” and 10 is “very satisfied”. How satisfied are you...											
	0 - Not at all satisfied	1	2	3	4	5	6	7	8	9	(10) 10 - Very satisfied
that the CFIA issues food recall notices in a timely manner	0%	0%	2%	1%	2%	10%	12%	22%	14%	16%	21%
with the CFIA handling of the food safety or labelling concern you reported	1%	0%	2%	5%	7%	12%	10%	13%	14%	17%	19%
with the CFIA email or website interaction you had	1%	1%	1%	2%	2%	15%	15%	21%	14%	9%	19%
with the Chronicle 360 article	0%	0%	0%	12%	0%	8%	12%	14%	16%	20%	18%
with the CFIA phone interaction you had	2%	0%	0%	6%	0%	14%	14%	18%	19%	11%	17%
with the podcast Inspect and Protect	2%	3%	1%	9%	7%	25%	7%	18%	11%	5%	12%

with the CFIA content on social media	1%	1%	1%	4%	4%	22%	16%	16%	15%	10%	12%
with the usability of the CFIA website	0%	0%	1%	3%	6%	21%	14%	21%	16%	7%	11%

Base: Consumers who recall seeing/ hearing reading about CFIA n = 1465, base differs by statement selected

Qualitative consumer insights: Linkage between the CFIA and food safety

The consumer participants in this year’s qualitative sessions were asked to research issues of plant and animal safety as “homework” (see the methodology section for related instructions) and to refer to the results of this research during our discussions. This exercise was designed to help shed light on what the Agency’s website contributes to Canadians’ understanding of the CFIA, its mission, its ways of working and key messages about plant and animal health. From this exercise, we noted the following:

- The Agency’s site emerges as a primary and authoritative source -- but not the only one -- on questions related to animal and plant health. It competes with other federal, provincial, commercial and NGO websites that were often described as easier to find and use. While these were not always seen as more authoritative than the CFIA site, they were often preferred for reasons of simplicity, focus on specific consumer-centric information and easily accessible practical and pragmatic advice. In contrast, the CFIA site was critiqued for being too complex, containing too much information, for being difficult to navigate and for presenting overly technical information.
- The Agency’s site apparently offers the specific information sought – at least on the questions about invasive species that may threaten plants or about importing exotic animals into Canada – but it’s not easily accessed. Most participants found this information more easily by using Google than by navigating through the site itself, which was generally described as “complex” and rather tangled.
- The site does not appear to support awareness of the Agency very well. Even though participants were made aware that the research was sponsored by the CFIA during the recruiting process and asked to investigate questions about plant and animal health – ones clearly in the Agency’s purview - very few were able to recall the Agency’s name or its role even after having spent time on the CFIA website. This was apparently because their research had also led them to a wide array of different government, departmental and other commercial sites such as Environment Canada, Agriculture and Agri-Food Canada, even the Canada Border Services Agency. Many participants reported losing sight on which part of Government is accountable for what in this mix. This is a likely reason why participants tended to conclude that the safety of Canada’s food supply is a shared and diffuse responsibility of “Government” as opposed to that of a (singular) Agency.

- That said, and despite preferences for other sites, the Government of Canada’s websites are widely seen as credible and authoritative. As was the case last year, this reflects Canadians’ enduring trust in the institutions of the federal government. The fact that several departments are communicating about essentially the same information, however, would appear to make it more difficult for Canadians to grasp where specific accountability for safe food lies. In short, Canadians are getting what they feel is credible information about plant and animal health, but also some impressions of vague, large bureaucracies with duplicated responsibilities and distributed accountability.

Confidence in the safety of Canada’s food supply

Consistent with last year, 77% of Canadians have considerable confidence in the safety of Canada’s food supply (5, 6 or 7 on a 7-point scale). Age and income are a factor here: those 55+ have a higher rate of confidence (81%) than those under 55 (74%), and those with a household income greater than \$100,000 also have a higher rate of confidence (80%) than those making under \$100,000 (75%).

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

1 – Not at all confident	2%
2	2%
3	4%
4	16%
5	27%
6	30%
7 – Very confident	20%

Base: Consumer total sample N=3001

Specific indicators of trust

Results show a 4 point increase this year in Canadians (70%) with 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 55+ (73%) versus those under 55 (67%). When asked about their trust that food product labels identify ingredients that may cause allergy/food sensitivity, again 70% of Canadians had a high level of trust (5, 6, or 7 on a 7-point scale). Among only those who report having food allergies/sensitivities themselves or a family member in their household (31% of Canadians), the level of trust

is consistent at 71% (5, 6, or 7 on a 7-point scale). This is significantly improved versus last year, where the trust was lower among this group (62%).

A5: Please rate 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 – Not at all confident	3%
2	1%
3	5%
4	20%
5	27%
6	25%
7 – Very confident	17%

Base: Consumer total sample N=3001

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

1 – Not at all confident	3%
2	2%
3	6%
4	20%
5	28%
6	25%
7 – Very confident	18%

Base: Consumer total sample N=3001

Consistent with last year, 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 (69%) are 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 at all confident	2%
2	1%
3	4%
4	17%
5	29%
6	27%
7 – Very confident	20%

Base: Consumer total sample N=3001

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

1 – Not at all confident	2%
2	1%
3	5%
4	21%
5	30%
6	25%
7 – Very confident	15%

Base: Consumer total sample N=3001

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

1 – Not at all confident	2%
2	1%
3	5%

4	22%
5	29%
6	25%
7 – Very confident	15%

Base: Consumer total sample N=3001

Qualitative insights on public faith in the food safety regime

Our discussions this year revealed no substantive changes or evolutions in how participants think about food safety or in their trust that food in Canada remains safe, nor any new concerns. Safe food in Canada remains an article of faith for most participants that is challenged only very rarely by the occasional recall or media-reported event. Even when unsafe food incidents occur, however, participants seem inclined to see organization within the supply chain as the most accountable. Participants are generally convinced that Canada has more than adequate food safety regulations and presume that enforcement is robust (although few are aware of what the enforcement regime looks like or costs, or even which part of Government is responsible).

This landscape is similar to what we found last year: Canadians are both highly confident in the safety of the food supply and generally unaware of how this level of safety is achieved, or which parts of Government are responsible. Participants themselves acknowledge that their trust in this one very specific aspect of Government accountability reflects their faith in Government as a whole. As we noted last year, however, this rather blind faith about the efforts of the Agency and limited awareness of the Agency itself leaves Canadians' trust in food vulnerable to challenges the Government may have on other fronts. Although hinted at by only a few participants, we did hear some point to what they felt was "all-over-the-place" responses to the pandemic as reason to doubt what the Government was doing to ensure food safety. This underscores the risks associated with Canadians' "blind faith" and suggests that investment in the communications that provides more detail about how this level of safety is achieved would be in the public interest.

Brand attributes assessment

With the removal of some of the attributes in this question from last year, we see that the results of the remaining attributes are mostly consistent year-over-year. We measured agreement (5, 6, or 7 on a 7-point scale) with statements about the CFIA, and most consumers agree to a considerable extent with important statements like "Food recalls are an example of the food system working" (73%), and "The CFIA looks out for the best interests of Canadians" (67%). Statements around efficacy and fairness of the

CFIA generated more middling scores; “The CFIA is effective in enforcing food safety regulations” (63%), and “All businesses are treated fairly by the CFIA” (52%).

Some statements were not so agreeable, with less than half of consumers “understand what the CFIA does” (47%), or thinks that “getting more information about food, plant or animal safety from the CFIA is easy” (45%). Overall, males and those with a university degree had higher agreement scores across all statements.

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
Food recalls are an example of the food system working	1%	1%	5%	14%	24%	24%	26%	6%
The CFIA looks out for the best interests of Canadians	1%	1%	5%	17%	24%	22%	21%	8%
The CFIA is effective in enforcing food safety regulations	1%	2%	5%	18%	27%	22%	15%	11%
All businesses are treated fairly by the CFIA	1%	2%	6%	16%	21%	17%	14%	22%
CFIA veterinarians are among the best in their field	1%	1%	5%	17%	21%	16%	12%	27%

Getting more information about food, plant or animal safety from the CFIA is easy	2%	3%	7%	20%	20%	14%	11%	24%
I understand what the CFIA does	3%	4%	11%	25%	23%	14%	10%	11%

Base: Consumer total sample N =3001

Qualitative insights on consumer understanding of the CFIA

Participants had some general impressions reinforced as a by-product of researching the questions in their homework exercises. The following are examples of notions they retained, namely that:

- Canada has high standards when it comes to animal and plant health – even “world class”.
- Strict oversight is applied to ensure these high standards are met.
- This oversight is focused on protection and prevention and the Canadian environment generally.
- Canada has massive and very complex regulatory packages to ensure the above.
- The Government’s efforts to ensure the safety of the Canadian food supply is “massive” and spread out across a number of different parts, notably Environment Canada, Agriculture and Agri-Food Canada, and the Canada Border Services Agency, and the CFIA (which was often referred to as “Inspections something” or variations on the “CFIA” acronym).
- That the whole business of ensuring a safe food supply is “complicated” and difficult to understand.

The CFIA site in particular seems to reinforce these impressions by “fore-fronting” regulatory acts and material intended for regulated organizations, and by presenting what most participants felt was a huge amount of information in a single place.

What we **did not** hear from participants was clear understanding of the CFIA, its mandate, size, scope, or budget. Finally, it was also clear that the very inefficient search function on the CFIA website contributes to impressions that this whole business is

complicated: a search for any term results in “at least 400 hits” that ultimately do not give the answer that is being sought. It should be noted that participants found this to be the case on most, if not all of the Government of Canada websites they visited.

Key driver analysis - Consumers

This year’s study includes a “key driver analysis”. This analysis indicates the relative importance of each of the predictor variables using the 7 attributes at A8 to predict the outcome variable (Familiarity, Trust, or Confidence). For each of these 3 key metrics, 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 similar results to last year in that communication to help consumers understand what the Agency does and providing additional ways to access information about the Agency are the most important drivers of familiarity with the CFIA. “I understand what the CFIA does” (53%) 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” (19%). Interestingly, the statement “CFIA veterinaries are among the best in their field” had the 3rd strongest importance share, suggesting that CFIA veterinaries are a relatively important driver of Agency familiarity.

CFIA – all attribute drivers of A2 familiarity (total sample)

Statement	Share of Importance (%)
I understand what the CFIA does	53.3
Getting more information about food, plant, or animal safety from the CFIA is easy	18.8
CFIA veterinaries are among the best in their field	9.8
All businesses are treated fairly by the CFIA	7.0
The CFIA is effective in enforcing food safety regulations	4.7
The CFIA looks out for the best interests of Canadians	4.9
Food recalls are an example of the food system working	2.5

Looking at the top drivers of trust in the Agency, the same statements come up as most important this year “The CFIA looks out of the best interests of Canadians” (23%), “The CFIA is effective in enforcing food safety regulations” (18%) and “Food recalls are an example of the food system working” (17%).

CFIA – all attribute drivers of A5 trust (total sample)

Statement	Share of Importance (%)
The CFIA looks out for the best interests of Canadians	22.6

The CFIA is effective in enforcing food safety regulations	17.7
Food recalls are an example of the food system working	17.0
All businesses are treated fairly by the CFIA	14.1
Getting more information about food, plant, or animal safety from the CFIA is easy	11.1
CFIA veterinaries are among the best in their field	10.7
I understand what the CFIA does	6.8

Stronger confidence in the CFIA is driven by consumers’ understanding of the Agency’s mandate; “the CFIA looks out for the best interests of Canadians” which has an 25% share of importance, their understanding that recalls are evidence of the enactment of that mandate; “Food recalls are an example of the food system working” 23% share of importance, and also that “the CFIA is effective in enforcing food safety regulations” (18% share of importance). Consumers want to feel confident and see evidence that the CFIA is working for them, and feel more confident when they do.

CFIA – all attribute drivers of A7 confidence (total sample)

Statement	Share of Importance (%)
The CFIA looks out for the best interests of Canadians	24.7
Food recalls are an example of the food system working	23.2
The CFIA is effective in enforcing food safety regulations	17.8
All businesses are treated fairly by the CFIA	11.1
CFIA veterinaries are among the best in their field	10.7
Getting more information about food, plant, or animal safety from the CFIA is easy	7.7
I understand what the CFIA does	4.8

Message evaluation - Consumers

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.” (75%) and “As a science-based regulator, the CFIA is increasingly using data and technology to be agile and responsive to new risks.” (70%), “The CFIA issues food recalls in a timely manner” (68%), and “The CFIA enforces regulations that help ensure Canada's plant resources are protected” (68%). Secondary messaging with lower agreement scores includes “The CFIA enforces regulations that helps ensure animals are transported humanely” (64%), “CFIA enforcement activities are strong enough to encourage companies to comply with the regulations” (64%), and “CFIA helps to facilitate international trade” (60%).

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%	4%	19%	25%	25%	25%
As a science-based regulator, the CFIA is believable when it issues a statement	1%	2%	5%	22%	26%	24%	20%
The CFIA issues food recall warnings in a timely manner	2%	2%	6%	22%	27%	24%	18%
The CFIA enforces regulations that help ensure Canada’s plant resources are protected	2%	1%	5%	24%	29%	22%	17%
The CFIA enforces regulations that helps ensure animals are transported humanely	3%	2%	7%	25%	29%	20%	15%
CFIA enforcement activities are strong enough to encourage companies to comply with the regulations	2%	2%	8%	24%	29%	21%	15%
CFIA helps to facilitate international trade	2%	2%	7%	29%	29%	18%	14%

Base: Consumer total sample N = 3001)

Consumers were then asked to rank the top 3 priorities for the CFIA. The number 1 ranked priority was “Verifying safe food is sold to consumers” by 44% of the sample. Next in priority was “Verifying importers do not import contaminated or fraudulent foods” (13%) and third priority was “Helping to keep foreign animal diseases out of Canada” (10%). “Helping to keep international markets open to Canadian food, plant and animal products” seemed least important to Canadian consumers, as less would be directly impacted by market closure to Canadian products.

Statement	RANK 1	2	3
Verifying safe food is sold to consumers	44%	17%	13%
Verifying importers do not import contaminated or fraudulent foods	13%	20%	17%
Helping to keep foreign animal diseases out of Canada	12%	13%	15%
Helping prevent the spread of plant pests and animal diseases in Canada	10%	16%	16%

Verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada	10%	15%	15%
Helping prevent plant pests and invasive species from entering Canada	8%	12%	15%
Helping to keep international markets open to Canadian food, plant and animal products	4%	7%	10%

Base: Consumer total N = 3001

A TURF analysis (Total Unduplicated Reach and Frequency) was used to measure which individual and unique messages contribute most to what consumers hear about the Agency. Consistent with the 2021 results, 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 75% 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 5% contribution to reach. The remaining contributing message is “As a science-based regulator, the CFIA is believable when it issues a statement” which adds an incremental 2%. Incremental reach levels off at this point, showing that these 3 messages have the potential to reach 82% of consumers.

CFIA consumer B1 messages - incremental reach (T3B%)

(Base: total sample)

Statement	%	Cumulative 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	75	75
The CFIA issues food recall warnings in a timely manner	5	80
As a science-based regulator, the CFIA is believable when it issues a statement	2	82
The CFIA enforces regulations that helps ensure animals are transported humanely	1	83
The CFIA enforces regulations that help ensure Canada's plant resources are protected	1	84
CFIA enforcement activities are strong enough to encourage companies to comply with the regulations	1	85
CFIA helps to facilitate international trade	0	85

Base: Consumer total N = 3001

Consumer perceptions of CFIA institutional attributes and values

When asked to consider a list of attributes that apply to the CFIA, “Scientific” (47%), “Informative” (41%) and “Trusted” (40%) are referenced most often. This list was shortened from last year, though results for top and bottom attributes were quite similar. Roughly a third of respondents selected “Responsive”, “Dedicated” and “Efficient”. Words not generally associated with the CFIA are “Punitive” (5%), “Innovative” (9%) and “Global Leader” (10%). The reader will note that the list of attributes presented to respondents in this year’s survey are mostly new and fewer in number. These changes were made to improve focus on the questions currently at hand for the Agency.

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

Word	%
Scientific	47
Informative	41
Trusted	40
Responsive	32
Dedicated	31
Efficient	31
Fair	24
Service oriented	23
Consistent	22
Caring	22
Respectful	21
Collaborative	15
Transparent	15
Global Leader	10
Innovative	9
Punitive	4
None of the above	10

Base: Consumer total N = 3001

Consumer perceptions of CFIA’s Focus

Consumers believe that the CFIA is mostly involved in activities at the border: “Checking food products being imported into Canada” (75%), and “Checking plant products coming into Canada” (69%). About half of consumers think the CFIA is involved in regulating “insects, fungus and other pests that affect plant health, but do not have a direct impact on the ability of consumers to eat the plant as food” (55%). Roughly half of consumers perceive the CFIA to be involved in situations involving animals being imported or exported, whether as pets, for food, or for other reasons. Less than 1 in 3 perceive the

CFIA to be implicated in food safety at restaurants, whether it be sanitary conditions or improperly cooked food.

B6 From the following list, indicate which of the following situations you believe the CFIA is involved in?	
	% Selected
Checking food products being imported into the country	75%
Checking plant products coming into the country	69%
Insects, fungus and other pests that affect plant health, but do not have a direct impact on the ability of consumers to eat the plant as food	55%
A dog being brought into Canada to be permanently adopted by a person living in Canada	52%
Live animals being exported from Canada to other countries to be consumed as food	51%
Live animals being exported from Canada to other countries for reasons other than to be consumed as food	45%
A dog being brought into Canada by a vacationing family	35%
A restaurant has a complaint of a dirty kitchen	30%
A person gets food poisoning from cooking and eating undercooked meat	25%

Another new question this year was one that asked consumers to indicate the percent of food they believe is inspected by the CFIA. Consumers believe that almost 2/3 of the food they consume has been inspected. This is higher for females (66%) than males (59%) and for those age 18-34 (65%) and 35-54 (63%) than those over age 55 (59%).

B7 In thinking of the food that you consume, what percentage do you think has been inspected by the CFIA?						
	Total %	Male	Female	Age 18-34	Age 35-54	Age 55+
% of food inspected by CFIA	62%	59%	66%	65%	63%	59%

Business perceptions of the CFIA

The following sections detail the responses of businesses whose operations are regulated by the CFIA, which have more developed understanding of the Agency given its relevancy to their business.

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 of 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.

CFIA reputation and performance indicators among businesses

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 81% - 82% for food, 81% for animal and 80% for plant businesses. These findings reflect a significant increase in familiarity over last year when the overall score was 72%.

A1: How familiar would you say your company is with the activities of the CFIA?

	1 - Not familiar at all	2	3	4	5	6	7 - Very familiar
Total sample	1%	2%	4%	11%	25%	23%	33%
Food	1%	2%	4%	11%	24%	24%	34%
Animal	1%	4%	5%	9%	23%	24%	33%
Plant	1%	2%	5%	11%	24%	25%	32%

Base: Total sample N=1499, Food N=1291, Animal N=277, Plant N=302

Note: Industry segments are not mutually exclusive

Businesses were asked about the types of communication they have received from CFIA in the past year. Email (86%) is the most recalled method of communication from the CFIA by business across all business lines. The next-most common source of communication is the CFIA website (37%) though higher amongst the animal line (43%) and plant line (44%). Portal notices in My CFIA were recalled by roughly one-third of businesses surveyed (32%), again recalled more among animal line (39%) and plant line (37%) businesses.

B4: How has your company received information from the CFIA in the past year?

Source	Total sample	Food	Animal	Plant
Email (including CFIA Listservs)	86%	86%	84%	86%
CFIA website	37%	36%	43%	44%
Portal notices in My CFIA	32%	31%	39%	37%
Personal interaction with CFIA representative	28%	26%	39%	34%
Telephone communications	24%	23%	35%	27%

Mailed documents	19%	19%	23%	23%
Through an industry association	10%	9%	13%	14%
Social media	4%	4%	4%	3%
Chronicle 360	2%	3%	3%	1%
Podcasts	0%	0%	0%	1%
Other	1%	1%	1%	1%
Not applicable: I have never received information from the CFIA	2%	2%	2%	3%

Base: Total sample N=1499, Food N=1291, Animal N=277, Plant N=302

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 most scores for all listed communication sources being higher than 80% overall and across all lines of business. The CFIA website had lower scores (total 72%, food 75%, animal 64%, plant 64%), as did the Portal Notices in My CFIA (total 78%, food 79%, animal 69%, plant 75%).

B5: Please indicate the level of understanding that your company has about the information received from the CFIA.

	1 – No understanding at all	2	3	4	5	6	7 – Understands completely
Personal interaction with CFIA representative	1%	1%	1%	5%	14%	35%	43%
Telephone communications	1%	2%	2%	8%	19%	30%	38%
Social media	0%	2%	3%	3%	24%	31%	37%
Mailed documents	2%	1%	3%	10%	24%	29%	31%
Chronicle 360	3%	0%	0%	6%	25%	36%	31%
Through an industry association	0%	0%	3%	8%	27%	32%	29%
Email (including CFIA Listservs)	0%	2%	5%	12%	23%	30%	27%
Portal notices in My CFIA	1%	3%	6%	12%	26%	30%	22%
CFIA website	1%	4%	8%	15%	23%	29%	19%

Base: Business; those who received specific communication methods; base size differs by method

Note: Industry segments are not mutually exclusive

Qualitative insights on CFIA reputation among businesses

Many of the themes and issues we heard about in last year’s exercise were echoed in this most recent qualitative work. The Agency’s reputation appears to be evolving favourably on some measures with some kinds of business, and not as much on others. We did not encounter evidence of any “new issues” relative to last year.

Rather, the findings this year suggest an Agency that is making strides improving processes and striking better balances with the businesses it deals with most, but perhaps less so with the businesses of a more niche vocation or smaller size. We note that compared to last year, when many of the “more intensely regulated” companies had complaints of a relatively moderate nature, these same companies seemed to have fewer and more minor issues a year later. In contrast, some of the “less regulated” companies this year seemed to have more serious issues. This would suggest that the Agency’s efforts to focus its resources is producing positive but unequal results: “favouring the many” and reducing their issues while perhaps increasing problems for those businesses outside of the “mainstream”. These observations are not, however, validated by the survey data, although this may simply be because we are not able to distinguish “niche” businesses in the way it emerged in discussions.

Business trust in CFIA to do “what is right”

As stated in the Scope 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 81%, (food 83%, animal 70%, plant 80%) down slightly from last year across all lines of business.

A4: Please indicate how much your company trusts the CFIA to do what is right.

	1 – Do not trust at all	2	3	4	5	6	7 – Trust completely
Total sample	3%	3%	4%	9%	18%	29%	34%
Food	3%	3%	4%	8%	18%	30%	35%
Animal	4%	6%	7%	13%	20%	26%	23%
Plant	4%	3%	4%	9%	21%	30%	28%

Base: Business; total sample N=1499, Food N=1291, Animal N=277, Plant N=302

Note: Industry segments are not mutually exclusive

Qualitative insights on the CFIA “doing what is right”

Our qualitative discussions suggest that interpretation of this question would vary significantly were it to clarify what, exactly, “doing right” means. Generally speaking, business participants were near unanimous in support of the Agency’s responsibility to ensure safe food, and rarely critical of the specific activities or requirements it imposes. To the contrary, we encountered stronger appreciation of this support this year relative to last year. That said, “doing right by businesses” also implies working in support of business, be it in helping ensure that permits are received promptly, that ambiguities in the regulations be resolved quickly (to ensure smooth operations) or even in ironing out the international agreements that might facilitate Canadian business abroad. In these respects, our discussions reveal more issues than these quantitative results suggest. As stated previously, and noting that progress is recognized on the “big ticket” issues confronting the more regulated organizations, there were signals that minor issues among more niche or less regulated organizations may be suffering. These would be important to track in subsequent waves of this study.

Business confidence in Canadian food safety

Just under half of all business respondents (46%) 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 92%, food 93%, animal 88%, plant 93%). Only about 5% of businesses rated their confidence somewhere between 1 and 3 on a 7-point scale.

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	1%	1%	2%	5%	13%	33%	46%
Food	1%	1%	2%	4%	13%	32%	48%
Animal	0%	1%	3%	8%	16%	31%	41%
Plant	1%	0%	1%	5%	17%	33%	43%

Base: Business; total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

Business confidence in safeguarding of food, plant and animals

When the question of confidence is broadened to include the safeguarding of animals and plants, we see a decrease in top box confidence, down to 37% very confident (7 on a 7-point scale). 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 still very high at 89% of total businesses interviewed (food 90%, animal 84%, plant 88%). Encouragingly, the number

of businesses that rated confidence at a 1 or 2 score remains negligible, as was the case last year.

A5a: Please rate your company's 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	1%	1%	3%	6%	17%	34%	37%
Food	1%	1%	3%	5%	17%	34%	39%
Animal	3%	1%	4%	8%	21%	32%	31%
Plant	1%	1%	2%	9%	18%	36%	34%

Base: Business; total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

Agency performance in safeguarding safety of food among businesses

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, with 39% giving the Agency a perfect 7 on a 7-point scale and almost 90% scoring the Agency a 5, 6, or 7 on a 7-point scale when asked about the safeguarding of food in Canada. As we noted last year, this continues to suggest that operators have a more informed perspective about threats to food safety beyond the Agency's purview, and that they may provide valuable 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 do you believe the CFIA is doing?

	1 – Not doing well	2	3	4	5	6	7 – Doing well
Food	1%	1%	3%	5%	16%	32%	39%

Base: Business Food N=1291
 Note: Industry segments are not mutually exclusive

Agency performance in safeguarding safety of plant health among businesses

Similarly, plant industry businesses rate the CFIA highly (5, 6 or 7 on a 7-point scale) with a score of 88% in safeguarding the health of plants in Canada, and a top box score (7 on a 7-point scale) of 32%, somewhat lower than the confidence in food safeguarding.

A6b: When it comes to safeguarding the health of plants in Canada how well do you believe the CFIA is doing?							
	1 – Not doing well	2	3	4	5	6	7 – Doing well
Plant	2%	0%	3%	7%	24%	32%	32%

Base: Business Plant N=302

Note: Industry segments are not mutually exclusive

Agency performance in safeguarding safety of animal health among businesses

When animal industry businesses were asked how the CFIA is doing, 80% gave a 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 and plant industries at only 26% (7 on a 7-point scale), signaling an area for the Agency to improve perception.

A6c: When it comes to safeguarding the health of animals in Canada how well do you believe the CFIA is doing?							
	1 – Not doing well	2	3	4	5	6	7 – Doing well
Animal	4%	1%	6%	9%	24%	31%	26%

Base: Business Animal N=277

Note: Industry segments are not mutually exclusive

Qualitative insights on the Agency’s reputation, continued

Our qualitative discussions with producers continue to suggest how the CFIA’s reputation varies across producer organizations as a function of how oversight meshes with the operations of the businesses concerned. This year, both our survey data and qualitative discussions suggest that the Agency continues to do better among bigger organizations, and especially ones that have found the resources to adapt their organizational structure to regulatory oversight, and who have perhaps been the focus of efforts to improve processes. Many of these larger organizations report positive trends and improvements in communications, notably in “My CFIA”, which was more a source of issues last year, and in the rationalization of procedures.

Conversely, our qualitative discussions clearly suggest that the Agency’s reputation tends to be less positive among businesses that rely on the CFIA for very pointed or specific things, or that fall outside “typical” operations. We hear comments from these businesses that would suggest that the Agency is less responsive, more remote, and occasionally even the source of considerable barriers to continued operations. Example

operations would include small business that make soil with unlisted components, laboratories that struggle to get safety certifications for the importation and handling of live plant materials, breeders of exotic horses, and so on.

Overall, however, most participants suggest general improvement, and credit the Agency in the following respects:

- For having open, helpful, and genuinely agreeable local staff and inspectors.
- For having improved processes, particularly those that are now resident on My CFIA – which has resulted in valued improvements in speed, easier (centralized) access to important documents and so on.
- And finally, as was the case last year, the Agency is credited for balanced oversight, in effect focusing attention and resources where it counts. Most business – and even the ones that have complaints – do not often challenge the roles and preoccupations of the Agency where safety is concerned.

The issues that emerge, in contrast, are more often about helping businesses operate smoothly, to exploit opportunities or simply to tend to decisions or procedures that may be minor in the grand scheme of things, but critically important to those operators that need them. Otherwise, some things we heard last year continue to be mentioned this year:

- A decrease in both accessibility and expertise: As was the case last year, participants have noticed that the local people they once relied on to provide insight into how things are meant to work, or what the rules prescribe seem less knowledgeable, and less able to make calls without “referring back to Ottawa”. Although we heard less about reductions in inspectors (noting that many inspections were done remotely due to the COVID19 pandemic and apparently with few problems), we did hear more about different inspectors apparently acting on different interpretation of the rules and/or seemingly less willing to decide things on their own, sometimes causing significant delays or other operational issues.
- Continued issues with local access for smaller operators: As was the case last year, smaller operators such as exotic plant breeders or small cattle breeders complain of severe issues simply accessing the services they need to continue operating businesses in remote locations. For example, animal breeders who wish to sell their products intra-provincially in remote areas of the country cannot access a local meat processor (because the rules and inspection regimes seem to make smaller operations prohibitively expensive) or labs within reasonable distance, often resulting in significant business challenges. These smaller operators argue that the Agency’s rules and procedures favor larger corporations to their detriment.

- De-personalized communications: Finally, we heard quite a bit (even from some larger and more regulated businesses) about difficulties contacting persons “in charge” or “in the know” in Ottawa. Several operators complained rather bitterly about having to call time and time again not only to get an answer but with the added burden having to re-explain their complicated issues time and again. From their perspective, it seems the Agency is working hard to isolate staff with specific expertise or authority from direct contact with businesspeople. Participants with these complaints note that individual staff who answer the phone seem rather clueless about their issues, unwilling to document their case (a few mentioned that the Agency would do well to adopt common customer service practices like case files and id numbers), and some were even unwilling to provide anything more than a first name.

Business evaluation of CFIA attributes and institutional values

Businesses were asked to evaluate how the CFIA is perceived across several attributes and values statements. On most attributes, Food and Plant businesses gave higher scores than Animal businesses did. 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. Some examples are: “Representatives of the CFIA are respectful in carrying out their duties” (80%), “Overall, the CFIA is a fair regulatory Agency” (73%), “Representatives of CFIA are helpful in providing us with information on regulations” (69%) and “Information received from the CFIA helps to stop future non-compliance” (68%). Those businesses with Indigenous owners or that have more than 50% of employees who are visible minorities tended to agree even more often with these positive statements about the CFIA.

The CFIA received lower scores for the statements “The CFIA provides better service compared to food inspection agencies in other developed countries” (43%) and many also do not think “The CFIA listens to the industry when it comes to understanding specific innovation and competitiveness needs” (48%).

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	80%
Overall, the CFIA is a fair regulatory Agency	73%
Representatives of CFIA are helpful in providing us with information on regulations	69%
Information received from the CFIA helps to stop future non-compliance	68%
CFIA is transparent in how they operate	58%

It is easy to have open and honest dialogue with the CFIA about regulatory priorities	58%
The CFIA is properly equipped to manage the complexity of Canada's food, animal and plant supply	57%
CFIA guidance on regulations is clear	57%
CFIA regulations have been implemented in a way that is fair to all businesses	57%
The decision-makers in my company feel that the CFIA regulations are very complicated	56%
The CFIA is sensitive to the reality of how things work in your specific industry	56%
The CFIA does business in the same way for everyone within their mandate	52%
CFIA listens to industry views when it comes to understanding specific regulatory priorities	51%
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	48%
The CFIA provides better service compared to food inspection agencies in other developed countries	43%
CFIA regulations are too basic for my company to be concerned about	16%

Base: Total sample N=1499

Key drivers analysis - Businesses

Using the attributes at A7, a key driver analysis was conducted to predict the outcome variable (familiarity, trust, or confidence). For each of the 3 key metrics, there is a uniquely important primary driver that the Agency should focus their communication to businesses to facilitate building familiarity, trust and confidence in the CFIA.

In assessing the primary driver of familiarity, the top attribute is “Representatives of the CFIA are respectful in carrying out their duties” (23% share of importance) which is up slightly from last year (21%). The next driver in order of importance is “Overall the CFIA is a fair regulatory Agency” (16%) and the third driving attribute of familiarity this year was “It is easy to have open and honest dialogue with the CFIA about regulatory policies” (10%). This driver moved up from last year where it had one of the lowest shares of importance. Essentially, familiarity with the Agency is driven by CFIA representatives carrying their duties in a respectful manner, the passing along of information regarding non-compliance, and representatives engaging stakeholders in open and honest dialogue.

CFIA – A7 attribute drivers of A1 familiarity (total sample)	
Statement	Share of importance (%)
Representatives of the CFIA are respectful in carrying out their duties	23.4
Information received from the CFIA helps to stop future non-compliance	16.2
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	9.7
CFIA guidance on regulations is clear	8.7
The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain	5.7
Overall, the CFIA is a fair regulatory Agency	5.2
Representatives of CFIA are helpful in providing information on regulations	4.3
The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities	3.6
The CFIA is sensitive to the reality of how things work in your specific industry	3.5
CFIA regulations have been implemented in a way that is fair to all businesses	3.5
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	3.2
CFIA is transparent in how they operate	3.2
The CFIA does business in the same way for everyone within their mandate	2.9
The decision-makers in my company feel that CFIA regulations are very complicated	2.5
The CFIA provides better service compared to food inspection agencies in other developed countries	2.4
CFIA regulations are too basic for my company to be concerned about	2.1

Base: Total sample N=1499

Looking at the predictors of trust in the CFIA among businesses, the primary driver is again fairness this year, however with a lower share of importance versus last year, along with perceptions that the Agency is transparent and sensitive to specific realities in each industry.

Fairness is indicated by the following statements: “Overall, the CFIA is a fair regulatory Agency” 14%, down slightly in terms of importance from last year, and “CFIA regulations have been implemented in a way that is fair to all businesses” 8%. Transparency – referenced with “CFIA is transparent in how they operate” (8%), and “The CFIA is

sensitive to the reality of how things work in your specific industry” – drives trust in the CFIA in a meaningful way.

CFIA – A7 attribute drivers of A4 trust (total sample)	
Statement	Share of importance (%)
Overall, the CFIA is a fair regulatory Agency	13.9
CFIA regulations have been implemented in a way that is fair to all businesses	8.3
CFIA is transparent in how they operate	7.9
The CFIA is sensitive to the reality of how things work in your specific industry	7.8
Information received from the CFIA helps to stop future non-compliance	7.5
The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities	7.3
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	6.7
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	6.3
The CFIA does business in the same way for everyone within their mandate	6.2
Representatives of the CFIA are respectful in carrying out their duties	6.2
The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain	5.6
CFIA guidance on regulations is clear	5.3
Representatives of CFIA are helpful in providing information on regulations	5.2
The CFIA provides better service compared to food inspection agencies in other developed countries	4.4
The decision-makers in my company feel that CFIA regulations are very complicated	0.9
CFIA regulations are too basic for my company to be concerned about	0.4

Base: Total sample N=1499

Lastly, CFIA gains the confidence of its business stakeholder by communicating fairness in its operations, and managing complex and sensitive realities of industry. “Overall the CFIA is a fair regulatory Agency” is the most important driver of organizational confidence (up slightly versus last year), and “The CFIA is properly equipped to manage the complexity of Canada’s food, animal and plant supply chain” is the 2nd most important driver of confidence (down slightly compared to last year).

CFIA – A7 attribute drivers of A6 confidence (total sample)	
Statement	Share of importance (%)
Overall, the CFIA is a fair regulatory Agency	13.7
The CFIA is properly equipped to manage the complexity of Canada's food, animal, and plant supply chain	10.7
The CFIA is sensitive to the reality of how things work in your specific industry	7.9
The CFIA provides better service compared to food inspection agencies in other developed countries	7.6
The CFIA does business in the same way for everyone within their mandate	7.6
Information received from the CFIA helps to stop future non-compliance	6.9
CFIA regulations have been implemented in a way that is fair to all businesses	6.9
Representatives of the CFIA are respectful in carrying out their duties	6.7
The CFIA listens to industry when it comes to understanding specific innovation and competitiveness needs	5.6
CFIA is transparent in how they operate	5.4
CFIA guidance on regulations is clear	5.3
Representatives of CFIA are helpful in providing information on regulations	5.2
The CFIA listens to industry views when it comes to understanding industry's specific regulatory priorities	5.2
It is easy to have open and honest dialogue with the CFIA about regulatory priorities	4.6
CFIA regulations are too basic for my company to be concerned about	0.5
The decision-makers in my company feel that CFIA regulations are very complicated	0.4

We also asked businesses to associate the CFIA with a list of attributes to understand the organization’s brand impression, and the list of attributes changed versus last year. In the context of selecting words from a set list that describe the CFIA as a partner to industry, businesses selected “Respectful” as the top pick again (49%) up 7pts from last year, “Fair” was second choice again (40%) up 3 pts from last year. 2 new attributes rounded out the “top 4”: “Informative” (39%) and “Trusted” (36%). Overall, performance on top attributes is markedly higher than last year, which may only be due to a shorter list of terms to select from. 3 new descriptors added this year, “Innovative”

(5%), “Global leader” (7%), and “Caring” (13%) were met with very low levels of agreement.

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	49
Fair	40
Informative	39
Trusted	36
Responsive	33
Collaborative	28
Consistent	26
Efficient	25
Scientific	25
Transparent	22
Service Oriented	21
Dedicated	20
Caring	13
Punitive	9
Global Leader	7
Innovative	5
None of the above	10

Base: Business total sample N=1527

Business impression of CFIA staff / leadership and effectiveness

The CFIA Inspectors and Enforcement staff are considered the most credible, responsive, and reliable members of the organization, more so than call centre staff, senior managers and the CFIA president. Based on the number who said do not know/ not sure, it seems that businesses have more interactions with the inspectors and enforcement staff that allows them to make a judgement on these characteristics. This finding is consistent across business lines.

A9. Consider your interactions with the CFIA and its leadership structure. Select the responses that you feel describe each:				
	Is credible	Is responsive	Is reliable	Do not know / Not sure
CFIA inspectors/enforcement staff	41%	47%	43%	26%
Call centre staff	20%	37%	24%	46%
CFIA senior management	18%	20%	19%	65%
The CFIA President	10%	9%	10%	81%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

In another assessment of described CFIA activities, between 77% and 83% of businesses (5, 6, or 7 on a 7-point scale) agree that the CFIA is contributing to the health and well-being of Canadians, the environment and the economy by protecting Canada's food, animals and plants. Across business lines, between 73% and 80% agree that CFIA enforcement activities encourage companies to comply with the regulations. About 3 in 4 believe that as a science-based regulator, the CFIA is believable when it issues a statement.

When it comes to issuing food recall warnings in a timely manner, 3 in 4 Food businesses agree. 77% of the Plant businesses agree that the CFIA enforces regulations that help to ensure Canada's plant resources are protected. There is lower agreement from the Animal businesses (61%) that the CFIA enforces regulations that help to ensure that animals are transported humanely.

B1 Below are some statements to describe the activities of the 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 is contributing to the health and well-being of Canadians, the environment and the economy by protecting Canada's food, animals and plants.	82%	83%	77%	83%
CFIA enforcement activities encourage companies to comply with the regulations.	79%	80%	73%	76%
As a science-based regulator, the CFIA is believable when it issues a statement.	77%	78%	70%	75%
The CFIA issues food recall warnings in a timely manner.	73%	76%	66%	63%
The CFIA enforces regulations that help to ensure that Canada's plant resources are protected.	68%	68%	58%	77%
The CFIA enforces regulations that help to ensure that animals are transported humanely.	60%	61%	63%	54%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

“Verifying safe food is sold to consumers” is ranked 1, 2 or 3 (76%) most often by all lines of business as the top priority for the CFIA. Next in importance are “Verifying importers do not import contaminated or fraudulent goods” (59%) and “Helping to keep international markets open to Canadian food, plant and animal products” (40%). About

1 in 3 consider “Helping to keep foreign animal diseases out of Canada”, “Helping prevent the spread of plant pests and animal diseases in Canada” and “Helping prevent plant pests and invasive species from entering Canada” to be top 3 priorities. “Verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada” (24%) was the lowest priority of the list across all lines of business.

B1a Please review the list below and rank what you personally feel the top 3 priorities of the CFIA should be.

RANKED 1, 2 or 3	TOTAL	FOOD	ANIMAL	PLANT
Verifying safe food is sold to consumers	76%	77%	72%	70%
Verifying importers do not import contaminated or fraudulent foods	59%	61%	52%	48%
Helping to keep international markets open to Canadian food, plant and animal products	40%	40%	46%	41%
Helping to keep foreign animal diseases out of Canada	35%	34%	41%	33%
Helping prevent the spread of plant pests and animal diseases in Canada	34%	33%	38%	38%
Helping prevent plant pests and invasive species from entering Canada	33%	30%	29%	43%
Verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada	24%	25%	23%	27%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

Qualitative insights on the Agency’s priorities

Our qualitative discussions with producers show that their sense of priorities would differ considerably depending on several factors including their business lines, the depth of their relationship with the Agency, as well as the degree to which they have been the focus (or not) of recent efforts to rationalize procedures.

Transparency is a key metric measured in this year’s survey. Businesses believe that the CFIA is transparent 70% (5, 6, or 7 on a 7-point scale) when it comes to assessing non-compliance with regulations. This is similar for Food business (72%) and lower for Animal (62%) and Plant (67%) businesses. Those businesses owned by Indigenous persons rated CFIA transparency even higher (85%). Our qualitative discussions continue to show that transparency on the part of the Agency – about the decisions it makes, its slow response times and these sorts of things – go a long way to building patience and goodwill among the businesses it regulates.

B2 In your opinion, how transparent do you think the CFIA is when it comes to assessing non-compliance with regulations?

	TOTAL	FOOD	ANIMAL	PLANT
(1) 1 Not at all transparent	3%	3%	5%	4%
(2) 2	2%	2%	3%	2%
(3) 3	4%	4%	5%	4%
(4) 4	21%	20%	24%	24%
(5) 5	25%	25%	25%	25%
(6) 6	24%	24%	22%	22%
(7) 7 Very transparent	21%	23%	16%	20%
NET: (5) + (6) + (7) Very transparent	70%	72%	62%	67%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

When assessing transparency in reporting (publishing) non-compliance, businesses gave a similar rating 71% (5, 6, or 7 on a 7-point scale). Food business (73%) rated this transparency metric higher than Animal businesses (65%) and Plant (65%) businesses. Again the Indigenous-owned businesses gave a higher rating for transparency of CFIA reporting (86%).

B3 How transparent do you think the CFIA is when it comes to reporting (publishing) non-compliance?

	TOTAL	FOOD	ANIMAL	PLANT
(1) 1 Not at all transparent	2%	2%	3%	2%
(2) 2	1%	1%	3%	1%
(3) 3	5%	5%	5%	7%
(4) 4	21%	19%	25%	25%
(5) 5	23%	23%	23%	25%
(6) 6	24%	25%	23%	20%
(7) 7 Very transparent	23%	25%	18%	20%
NET: (5) + (6) + (7) Very transparent	71%	73%	65%	65%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

A new question in 2022 asked businesses to rank the importance of services offered by the CFIA. The top ranked service is “I can contact a CFIA representative for clarification” (36% ranked #1 and 83% ranked 1,2 or 3), followed by “Services are available when I need them” (20% ranked #1 and 69% ranked 1,2 or 3) and “The services are easy to understand” (16% ranked #1 and 53% ranked 1,2 or 3). This data, and particularly the importance attached to being able to contact a person echoes sentiments we heard in our focus groups. In these, we note that the Agency is recognized for having made substantial efforts to improve communications and rationalize procedures among some, but not all businesses.

B8 When your company assesses the services offered by the CFIA, which elements are the most important? Please rank the top 3 service elements.				
	Ranked #1	Ranked #2	Ranked #3	RANK 1, 2 OR 3
I can contact a CFIA representative for clarification	36%	26%	21%	83%
Services are available when I need them	20%	24%	24%	69%
The services are easy to understand	16%	19%	17%	53%
I can access all of the services offered by the CFIA in 1 place	13%	15%	19%	47%
The services offered by CFIA help prevent non-compliance	12%	15%	17%	44%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302

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 (85%) as the most common mode of communication. This is significantly higher than last year at (58%). The CFIA website was used by 37% of businesses (down from 46% last year), and Portal notices in My CFIA were used by roughly 1 in 3 businesses surveyed. These top 3 communication modes also score highly on understanding and satisfaction, indicating businesses' preference for these modes. In terms of preference for future communications, email remains overwhelmingly preferred as the method for future communication (86%). Telephone communications (28%), personal interaction (28%) and CFIA website (25%) to accompany the primary email communication are much less preferred. Virtual chat from the CFIA website or My CFIA were added to the question this year, but had low preference among businesses. Communication trends are fairly consistent for each line of business individually.

Total sample	Methods of communication from CFIA (B4)	T3B Understand communication (B5)	T3B Satisfied with communication (B7)	Preferred method of communication (B9)
Email (including CFIA Listservs)	86%	80%	82%	86%
CFIA website	37%	72%	69%	25%
Portal notices in My CFIA	32%	78%	74%	22%
Personal interaction with a CFIA representative	28%	92%	90%	28%
Telephone communications	24%	87%	85%	28%
Mailed documents	19%	84%	82%	16%
Through an industry association	10%	89%	82%	7%
Social media	4%	92%	86%	2%
Chronicle 360	2%	92%	86%	1%
Podcasts	0%	100%	100%	1%
Virtual chat from the CFIA website or My CFIA	n/a	n/a	n/a	13%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302

Note: Industry segments are not mutually exclusive

We conducted a TURF analysis to understand what modes of communication drive the greatest satisfaction with communication from the CFIA. Comparing top 3 box scores (5, 6, or 7 on a 7-point scale) show that most of the satisfaction is driven through email (71%, up from last year where Email was also the top method of communication at 48% contribution). We see an incremental 4% contribution from Personal interaction with CFIA representative, and then an additional 3% from mailed documents. This is where the incrementality levels off, indicating that a focus on the top 3 is the most efficient way to drive satisfaction with the CFIA among businesses.

Business B7 Satisfaction with Communication - Incremental Reach (T3B%)

Source	Incremental Reach	Cumulative Messaging Reach
Email (including Listervs)	71%	71%
Personal interaction with CFIA representative	4%	75%
Mailed documents	3%	78%
CFIA website	1%	81%
Portal notices in My CFIA	1%	82%
Telephone communications	1%	83%
Through an industry association	1%	83%
Social Media	0%	84%
Podcasts	0%	84%
Chronicle 360	0%	84%

Base: Total sample N=1499

The overall satisfaction with CFIA communications (5, 6 or 7 on a 7-point scale) shows that nearly 3 in 4 (73%) businesses are very satisfied with the tools the CFIA uses to communicate, indicating a modest improvement relative to last year. This is consistent across all food and plant industry segments, but slightly lower for businesses from animal lines (65%).

B6 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%	13%	24%	27%	21%
Food	3%	3%	5%	14%	24%	28%	22%
Plant	8%	4%	7%	16%	21%	26%	18%
Animal	5%	4%	4%	12%	23%	30%	20%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302

Note: Industry segments are not mutually exclusive

Businesses are split on the best way to have more open and clear discussions with the CFIA. Conducting formal consultations (32%), informal quarterly consultations (30%), and industry association events (27%) were all equally divided. This was true across all lines of business.

B10 When trying to understand new requirements and regulatory priorities, what is the best way to have more open and clear discussions with CFIA regulators?

	%
(1) Informal quarterly consultations	30%
(2) Formal consultations	32%
(3) Industry association events	27%
(4) Other	6%
(99) Not applicable: I wish the CFIA would not send me any future communications	5%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

In terms of topics that drive the most interest if CFIA was to hold webinars, a webinar on Import requirements seems most appealing (47% of businesses would be interested). Other topics of interest were Labelling (43%), with more interest among food business and lower interest among plant and animal businesses. “How to use my CFIA portal to apply for licences and other permissions” also had modest interest (41%), higher for plant business and lower for food and animal businesses. Less interesting topics were “Preventive control plans” (39%) overall, and “Traceability” (33%) overall. Both of these topics were more interesting to the Food businesses.

B11 If the CFIA was holding webinars, what topics would drive the most interest?

	TOTAL	FOOD	ANIMAL	PLANT
Import requirements	47%	45%	49%	45%
Labelling	43%	47%	29%	30%
How to use MY CFIA portal to apply for licences and other permissions	41%	40%	42%	47%
Preventive control plans	39%	44%	32%	24%
Traceability	33%	36%	27%	20%
Do not know/Prefer not to say	12%	11%	13%	14%
Other	4%	3%	7%	5%

Base: Business total sample N=1499, Food N=1291, Animal N=277, Plant N=302
 Note: Industry segments are not mutually exclusive

Appendices

Sample profiles

Profile of consumer sample (S1a, S2, C1, X2-X8)

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

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3001	409	549	1164	678	193	840	990	1170	1501	1501
(1) 18 to 24	11% -	11%	11%	11%	11%	11%	39% BC	0%	0%	7%	15% A
(2) 25 to 34	17% -	17%	16%	17%	17%	17%	61% BC	0%	0%	10%	24% A
(3) 35 to 44	17% -	17%	17%	17%	17%	17%	0%	52% AC	0%	12%	22% A
(4) 45 to 54	16% -	16%	16%	16%	16%	16%	0%	48% AC	0%	15%	17%
(5) 55 to 64	17% -	17%	17%	17%	17%	17%	0%	0%	44% AB	22% B	12%
(6) 65 or older	22% -	22%	22%	22%	22%	22%	0%	0%	56% AB	34% B	10%

S2 In which province or territory do you live?

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3001	409	549	1164	678	193	840	990	1170	1501	1501
(1) British Columbia	14% -	100% BCDE	0%	0%	0%	0%	14%	14%	14%	14%	14%
(2) Alberta	11% -	0%	63% ACDE	0%	0%	0%	13%	11%	11%	10%	13% A
(3) Manitoba	4% -	0%	21% ACDE	0%	0%	0%	3%	4%	4%	5% B	3%
(4) Saskatchewan	3% -	0%	17% ACDE	0%	0%	0%	2%	3% A	4% A	3%	3%
(5) Ontario	39% -	0%	0%	100% ABDE	0%	0%	39%	39%	39%	39%	39%
(6) Quebec	23% -	0%	0%	0%	100% ABCE	0%	23%	23%	23%	23%	23%
(7) New Brunswick	2% -	0%	0%	0%	0%	31% ABCD	2%	3%	2%	2%	2%
(8) Prince Edward Island	0% -	0%	0%	0%	0%	5% ABCD	0%	0%	0%	0%	0%
(9) Nova Scotia	3% -	0%	0%	0%	0%	47% ABCD	3%	2%	4%	3%	3%
(10) Newfoundland and Labrador	1% -	0%	0%	0%	0%	17% ABCD	1%	1%	1%	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 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%

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

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3001	409	549	1164	678	193	840	990	1170	1501	1501

(1) I am solely responsible	53% -	56%	51%	52%	57% B	52%	45%	62% AC	51% A	48%	59% A
(2) I share in this responsibility	40% -	36%	43% AD	42%	37%	44%	43% B	35%	42% B	45% B	35%
(3) Somebody else in my family or household looks after grocery shopping	5% -	6%	6%	5%	5%	3%	9% BC	2%	5% B	6%	4%
(4) Prefer not to say	1% -	1%	1%	1%	2%	1%	2% BC	1%	1%	1%	2%

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

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3001	409	549	1164	678	193	840	990	1170	1501	1501
(1) Less than a high school diploma or equivalent	3% -	3%	2% 29%	3%	4% B	2%	3% B	2%	4% B	3%	3%
(2) High school diploma or equivalent	24% -	27% C	CD	20%	22%	30% CD	29% BC	20%	23%	22%	25%
(3) Registered apprenticeship or other trades certificate or diploma	6% -	4%	8% AC	4%	9% AC	6%	6%	5%	7% B	7%	5%
(4) College, CEGEP or other non-university certificate or diploma	26% -	24%	25%	26%	28%	23%	22%	27% A	27% A	24%	28% A
(5) University certificate or diploma below bachelor's level	6% -	8% B	5%	5%	7% B	10% BC	7%	6%	6%	6%	6%
(6) Bachelor's degree	25% -	24%	23%	29% BDE	21%	21%	24%	29% AC	22%	26%	23%
(7) Graduate degree above bachelor's level	9% -	8%	8%	12% ABDE	8%	6%	8%	11% A	9%	11% B	8%
(8) Prefer not to answer	1% -	1%	1%	1%	0%	1%	1% C	1% C	0%	0%	1%

X3 What language do you speak most often at home?

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3001	409	549	1164	678	193	840	990	1170	1501	1501
(1) English	79% -	95% D	97% DE	95% D	26%	92% D	82%	79%	78%	79%	80%
(2) French	18% -	1%	1%	1%	73% ABCE	6% ABC	16%	18%	19%	18%	17%
(3) Other	3% -	4% DE	2%	4% DE	1%	1%	2%	4% A	3%	3%	3%
(4) Prefer not to answer	0% -	0%	0%	0%	0%	1%	1% C	0%	0%	0%	1%

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

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	3001	409	549	1164	678	193	840	990	1170	1501	1501
(1) Under \$20,000	8% -	6%	5%	8% B	10% AB	8%	12% BC	7%	6%	7%	9% A
(2) \$20,000 to just under \$40,000	16% -	15%	19% C	14%	16%	19%	17% B	13%	18% B	15%	17%
(3) \$40,000 to just under \$60,000	17% -	17%	17%	14%	20% C	17%	16%	15%	18% B	16%	17%
(4) \$60,000 to just under \$80,000	16% -	13%	16%	15%	17%	18%	15%	15%	16%	16%	15%
(5) \$80,000 to just under \$100,000	13% -	12%	15% D	14% D	11%	13%	13%	14%	13%	15% B	12%
(6) \$100,000 to just under \$150,000	15% -	19% BDE	12%	17% BDE	13%	10%	13%	19% AC	13%	16%	14%
(7) \$150,000 and above	8% -	10% DE	9%	10% DE	6%	5%	6%	12% AC	7%	10% B	6%
(8) Prefer not to answer	7% -	7%	7%	8%	7%	10%	8%	6%	8%	5%	10% A

X5 Are you an Indigenous person?

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B

Base size	3001	409	549	1164	678	193	840	990	1170	1501	1501
(1) Yes	4% -	3%	7% ACD	4%	4%	4%	9% BC	4% C	2%	4%	5%
(2) No	96% -	97% B	93%	96% B	96% B	96%	91%	96% A	98% AB	96%	95%

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

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	131	14	38	45	25	7	75	35	21	63	68
First Nations (North American Indian)	41% -	66% B	26%	49% B	32%	46%	49% C	33%	25%	47%	35%
Métis	36% -	19%	57% AC	24%	39%	31%	35%	29%	56%	34%	39%
Inuk (Inuit)	4% -	11%	0%	2%	10%	0%	5%	4%	0%	8% B	0%
Other (Specify)	3% -	0%	2%	7%	0%	0%	1%	8%	0%	2%	4%
Prefer not to answer	16% -	4%	15%	18%	19%	23%	10%	26%	19%	10%	22%

X7 Are you a member of a visible minority group?

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	2870	395	510	1119	653	186	765	955	1150	1437	1433
(1) Yes	18% -	26% BDE	15% DE	24% BDE	9% E	4%	28% BC	21% C	8%	16%	20% A
(2) No	82% -	74%	85% AC	76%	91% ABC	96% ABCD	72%	79% A	92% AB	84% B	80%

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

Column %	Region						Age			Gender	
	NET	BC	Prairies	Ontario	Quebec	Atlantic	18-34	35-54	55+	Male	Female
Column	A	A	B	C	D	E	A	B	C	A	B
Base size	510	101	75	264	61	8	213	202	96	228	282
Chinese	33% -	49% BCD	32% D	32% D	16%	29%	26%	40% A	36%	38% B	29%
South Asian/East Indian	16% -	10% E	17% E	20% AE	11% E	0%	17%	13%	21%	18%	15%
Black	14% -	1%	13% A	16% A	22% A	42% A	18% C	15% C	2%	10%	16% A
Filipino	9% -	8%	17% C	7%	8%	16%	13% B	7%	7%	6%	12% A
Other visible minority group (specify)	7% -	6%	7%	7%	3%	15%	2%	7% A	16% AB	9%	5%
Person of mixed origin (with 1 parent in 1 of the visible minority groups)	6% -	4% E	1%	6% BE	18% ABE	0%	10% B	4%	4%	3%	9% A
Southeast Asian	5% -	12% BCE	4%	3% E	6%	0%	5%	7%	3%	5%	6%
Non-White West Asian, North African or Arab	5% -	3%	3%	4%	11%	15%	5%	4%	5%	5%	4%
Non-White Latin American	4% -	2%	2%	4% E	10% E	0%	6% C	4%	1%	2%	6% A
Japanese	4% -	7% DE	1%	4% DE	0%	0%	2%	4%	6%	4%	3%
Korean	3% -	5% E	3%	2% E	3%	0%	3%	4%	1%	3%	3%

Profile of business sample (S3, X1-X15)

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?

Column %	Total	FOOD	ANIMAL	PLANT
Food preparation	11% -	13% CD	10% D	3%
Food importing	38% -	44% CD	22%	16%
Food exporting	18% -	21% CD	20% D	14%
Interprovincial trade of food	15% -	18% CD	11%	10%
Food manufacturing	22% -	26% CD	15% D	8%
Farming	16% -	19% CD	26%	25%
Food/beverage manufacturing or processing	17% -	20% CD	10%	8%
Meat and poultry slaughter	2% -	2%	4% D	1%
Other (specify)	9% -	11% CD	12%	9%
Live animal importing	6% -	4%	34% BD	5%
Live animal exporting	4% -	2%	20% BD	2%
Germplasm (genetic material) import	1% -	0%	3% BD	1%
Germplasm (genetic material) export	1% -	0%	4% BD	1%
Animal product or by-product importing	3% -	3%	18% BD	4%
Animal product or by-product exporting	2% -	2%	13% BD	3%
Live animal domestic management	2% -	2%	9% BD	1%
Animal product or by-product preparation or manufacture	1% -	1%	6% BD	1%
Animal feed (including feed mills and feed sellers)	2% -	1%	9% BD	2%
Pet food import	1% -	1%	6% BD	0%
Pet food export	1% -	1%	5% BD	2%
Animal transportation (including freight forwarders)	1% -	1%	5% BD	1%
Artificial insemination centres	0% -	0%	2% BD	0%
Veterinary biologics	0% -	0%	2% BD	1% B
Horse owners	1% -	1%	4% BD	0%
Small flock owners (including bird collections)	1% -	1%	5% D	1%
Other (specify)	4% -	4%	22% BD	9% B
Fertilizers and supplements	3% -	1%	3%	14% BC
Forestry products	1% -	0%	1%	7% BC
Horticulture (greenhouse, nursery, bulbs, fruit trees, grapevines)	6% -	3%	3%	30% BC
Crops (grains, oilseeds)	4% -	3%	6%	18% BC
Potatoes	3% -	3%	2%	14% BC
Seed growing (other than seed potato)	1% -	1%	2% B	6% BC
Seed establishments/ handling	1% -	1%	1%	4% BC
Plant breeding	1% -	0%	2% B	5% BC
Plant breeders' rights (intellectual property)	1% -	0%	1% B	4% BC
Invasive species prevention and management	0% -	0%	1% B	2% B
Other (specify)	5% -	3%	10% B	24% BC
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	B	C	D

X1 Approximately how many people are employed by your company?

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(1) Sole proprietor / just me	12% -	12%	16%	11%
(2) 2 to 9	36% -	36%	38%	34%
(3) 10 to 49 employees	29% -	30% B	24%	26%
(4) 50 to 99 employees	8% -	9% B	5%	8%
(5) 100 to 499 employees	10% -	9%	7%	12% A
(6) 500 to 999 employees	1% -	1%	3%	2%
(7) 1000 to 4999 employees	1% -	1%	1%	3% A
(8) 5000+ employees	1% -	1%	3% A	3% A
(9) I do not know/ Prefer not to answer	2% -	1%	3%	2%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

X2 What is the approximate annual revenue of your company?

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(1) Less than \$100,000	16% -	16%	21% C	14%
(2) \$100,000 to \$499,999	15% -	16%	14%	15%
(3) \$500,000 to \$999,999	10% -	11% C	9%	7%
(4) \$1 million to less than \$25 million	35% -	35% B	25%	36% B
(5) \$25 million to less than \$100 million	6% -	6%	6%	9%
(6) \$100 million or more	2% -	2%	1%	3%
(7) I do not know/ Prefer not to answer	15% -	14%	22% AC	16%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

X3 How long has your company been in operations?

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(10) Less than a year	4% -	4%	3%	3%
(11) More than 1 but less than 5 years	17% -	17% C	18%	13%
(12) 5 or more years but less than 10 years	12% -	13% BC	9%	12%
(13) 10 or more years but less than 25 years	27% -	27%	26%	22%
(14) More than 25 years	38% -	37%	41%	48% A
(15) I do not know/ Prefer not to answer	2% -	2%	3%	2%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

X5 In which regions does your company currently do business?

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
British Columbia	31% -	30%	30%	35% A
Alberta	27% -	26%	34%	28%
Saskatchewan	18% -	17%	24%	23% A
Manitoba	18% -	18%	23%	23% A
Ontario	48% -	47%	50%	53%
Quebec	38% -	38% B	27%	36% B
New Brunswick	15% -	15%	13%	19% AB
Prince Edward Island	12% -	11%	12%	18% AB
Nova Scotia	15% -	15%	17%	16%
Newfoundland and Labrador	10% -	9%	11%	11%
Yukon	5% -	5%	4%	7% A
Nunavut	4% -	3%	2%	4%
Northwest Territories	4% -	4%	3%	4%
United States of America	21% -	19%	27%	30% A
Outside of the United States of America or Canada	11% -	10%	17% A	16% A
NET	100% -	100% -	100% -	100% -
Column Names	A	A	B	C

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

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
British Columbia	19% -	19%	19%	24% A
Alberta	13% -	13%	22% AC	11%
Saskatchewan	6% -	5%	11% AC	7%
Manitoba	6% -	6%	9%	6%
Ontario	36% -	35%	39%	38%
Quebec	25% -	27% B	16%	22% B
New Brunswick	4% -	5%	4%	6%
Prince Edward Island	3% -	3%	4%	6%
Nova Scotia	5% -	5%	9%	6%
Newfoundland and Labrador	2% -	2%	3%	2%
Yukon	1% -	1%	1%	1%
Nunavut	0% -	0%	1%	0%
Northwest Territories	0% -	0%	0%	1%
United States of America	6% -	6%	9%	8%
Outside of the United States of America or Canada	3% -	3%	6%	5%
NET	100% -	100% -	100% -	100% -
Column Names	A	A	B	C

X7 What is the ownership status of your company?

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(1) Publicly-traded	5% -	4%	7%	7% A
(2) Privately-held	86% -	87% BC	84%	82%
(3) Government/Crown	1% -	0%	2% A	3% A
(4) Not sure	9% -	9%	7%	9%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

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

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(1) Headquarters located in Canada	90% -	90%	89%	89%
(2) Headquarters located outside of Canada	8% -	8%	9%	9%
(3) Not sure	2% -	2%	2%	1%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

X8f Would you consider the organization to be a family-owned organization?

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(1) Yes	69% -	69%	68%	67%
(2) No	26% -	25%	27%	28%
(3) Do not know / Not sure	6% -	6%	5%	6%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

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

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(1) Weekdays 9am to 5pm	47% -	47% B	33%	45% B
(2) Monday through Saturday	15% -	15%	18%	19%
(3) Weekdays & weekends	15% -	15%	19%	17%
(4) Open 24 hours	7% -	6%	15% AC	7%
(5) Other (Specify)	12% -	12%	10%	9%
(6) Not sure	3% -	3%	4%	4%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

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

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
(1) Weekdays during the day	78% -	79% B	74%	78%
(2) Weekdays during the evening	3% -	3%	4%	3%
(3) Weekends, during the day	10% -	9%	10%	12%
(4) Weekends, during the evenings	1% -	1%	1%	0%
(5) Not sure	8% -	7%	11% AC	6%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

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

Column %	Industry Segment			
	Total	FOOD	ANIMAL	PLANT
Summer	32% -	34% BC	27%	28%
Fall	29% -	29%	27%	35% B
Winter	18% -	18%	17%	17%

Spring	28% -	25%	34%	43% AB
Holiday occasion(s)	15% -	17% BC	12%	10%
Consistent year-round	31% -	30%	35% AC	25%
Not sure	5% -	5%	6% A	5%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

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

Industry Segment				
Column %	Total	FOOD	ANIMAL	PLANT
(1) Yes	5% -	5%	5%	4%
(2) No	88% -	88%	90%	89% A
(3) Unsure	7% -	7%	5%	7%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

X13 For statistical purposes only, what is your gender?

Industry Segment				
Column %	Total	FOOD	ANIMAL	PLANT
(1) Male	53% -	54% B	47%	58% B
(2) Female	39% -	38%	43% C	34%
(3) Other	0% -	0% -	0% -	0% -
(4) Prefer not to answer	8% -	8%	11% A	8%
NET	100% -	100% -	100% -	100% -
Column Population	1499	1291	277	302
Column Names	A	A	B	C

X14 Approximately, what percentage of individuals might identify as a visible minority?

Industry Segment				
Column %	Total	FOOD	ANIMAL	PLANT
0%	55% -	55%	64%	60%
1-19%	8% -	8%	10%	7%
20-39%	7% -	7%	4%	7%
40-59%	7% -	8%	8%	5%
60-79%	3% -	3%	1%	2%
80-100%	19% -	20%	13%	19%
NET	100% -	100% -	100% -	100% -
Column Population	903	781	157	167
Column Names	A	A	B	C

X15 Please describe the approximate percentages of individuals with a senior management position who identify as female.

Industry Segment				
Column %	Total	FOOD	ANIMAL	PLANT
0%	23% -	23%	21%	27%
1-19%	11% -	11%	12%	12%

20-39%	15% -	16%	11%	16%
40-59%	32% -	32%	36% A	31%
60-79%	7% -	7%	7%	4%
80-100%	11% -	11%	14%	9%
NET	100% -	100% -	100% -	100% -
Column Population	1087	941	197	213
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.

Methodology

Quantitative methodology

The Reputation study involved 2 surveys, 1 for businesses and the other for consumers. The consumer portion of the study was conducted as an online web survey using the Dynata panel of respondents. The desired sample structure is available below. A total of 3,001 completed surveys were collected across Canada between February 3rd and February 11th, 2022.

Quota	Target Completes	Actual Completes
Region		
Atlantic Canada	193	193
Quebec	677	678
Ontario	1163	1164
Manitoba	109	109
Saskatchewan	92	92
Alberta	349	349
British Columbia	406	409
Territories	10	7
Age		
18 – 24	329	320
25 – 34	517	520
35 – 44	497	504
45 – 54	472	490
55 – 64	517	488
65+	667	679
Gender		
Male	1500	1428
Female	1500	1531
Other	-	25
Prefer not to answer	-	17
Total	3000	3001

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=3001) was weighted using Stats Can 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 %s
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%
Grand Total	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 an online survey where respondents were sent email invitations directly by the CFIA, with reminders being sent a few days later. A total of 7,219

invites were sent and 1499 respondents completed the survey (259 French, 1240 English), for a 14% completion rate. In survey research non-response bias is always a possible confound since certain types of people may be more willing to respond to a survey request than others. However, the participation rate is within industry standards for this type of survey so additional investigation is not required at this time.

The average survey length for the online survey was 19 minutes and 12 seconds. We need to keep in mind that, during an online survey, the time elapsed does not necessarily align perfectly with survey duration since respondents may not always complete the survey all at once. Data was collected between February 8th and March 8th, 2022.

Quotas were monitored for the business study for business type, whether it related to food, animal, or plant. Below are the targets and actuals broken down.

Quota	Target Completes	Actual Completes
CFIA Sample		
Food business	500	1291
Animal business	500	277
Plant business	500	302
Total	1500	1499

Qualitative methodology

Chosen method

Given the objectives set out for this study, the time and resources available, online focus group methodology was chosen as the optimum approach. All participants 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

For this year’s study, the qualitative process was organized as follows:

- 8 focus groups with consumers. These consumers were recruited via cold-call contacts and were designed to ensure that Canadians from different areas of the country, walks of life, ages and income levels participated. 6 of these groups were held in English and 2 in French.
- 8 focus groups with different representative of businesses that work in the plant and animal lines (as defined by the Agency). These participants were recruited either from the survey (from those who volunteered to participate in follow-up

research), invitations emailed to Agency contacts, or via cold-calls to pre-identified businesses.

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 \$150 for their participation – in order to encourage participation in our request that they undertake modest research of plant and animal safety related issues prior to our discussions. Business operators and association personnel were offered \$200 for their participation.

Moderating and analysis

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

Questionnaires

Consumer questionnaire

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.

To take the survey in an alternative format, please contact support@e54surveys.com (<mailto:support@e54surveys.com>).

To verify the legitimacy of this survey you can contact the lead researcher at Patterson Langlois john.patterson@plinc.ca or the Canadian Food Inspection Agency (CFIA) at CFIA.information.ACIA@canada.ca (CFIA.information.ACIA@canada.ca).

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S1

In what year were you born?

Minimum: 1900, Maximum: 2022

-8 Prefer not to answer

S1a Show if S1 Refused

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

- 1 Younger than 18 years old
- 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

T1 Show if S1 S1a Under 18

We're sorry but for this survey you must be 18 years of age or older.

Please wait while your browser redirects to your panel.

Status Code: 501

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
- 15 Prefer not to answer

T2 Show if S2 outside Canada OR refused

We're sorry but for this survey you must live in Canada.

Please wait while your browser redirects to your panel.

Status Code: 502

T4 Show if Region Quota Block

We're sorry but we've filled our quota of people like yourself.

Please wait while your browser redirects to your panel.

Status Code: 571

S3a

Do you or anybody in your household have any food allergies or sensitivities?

Select all that apply

- 1 Yes, I have a food allergy or sensitivity
- 2 Yes, somebody in my household has a food allergy or sensitivity
- 3 No (Exclusive)

4 I'm not sure/Don't know (Exclusive)

S3b Show if S3a Yes

You said that you or somebody in your household has one or more food allergy or sensitivity. Please indicate the type and severity of any applicable food allergies or sensitivities in your household.

1. Milk *
2. Eggs *
3. Tree nuts *
4. Peanuts *
5. Shellfish *
6. Fin Fish *
7. Soy *
8. Wheat *
9. Sesame *
10. Caffeine *
11. Sulfites *
12. Salicylates *
13. Amines *
14. Mustard
15. Other foods

Levels marked with * are randomized

- 7 7 - Very sensitive or very allergic
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 - Not sensitive or allergic at all

S3f Show if S3b Other 2 to 7

What other food allergies/sensitivities do you have?

Section CFIA Key Performance Indicators

AOF, AOA, AOP

Page

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.

1. _____
2. _____
3. _____
4. _____
5. _____

-9 Not aware of any

Page

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.

1. _____
2. _____
3. _____
4. _____
5. _____

-9 Not aware of any

Page

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.

1. _____
2. _____
3. _____
4. _____
5. _____

-9 Not aware of any

Section

A1, A2, A3, A3a, T3, A3ai, A4, Ax, A5, A6, A7, A7a, A7b, A7c, A8

Page

A1

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?

Select all that apply

- 1 The Canadian Food Inspection Agency (CFIA) *
- 2 Municipal inspectors (for example, public health inspectors) *
- 3 Provincial food safety regulators (Provincial or Territorial governments) *
- 4 Health Canada *
- 5 Agriculture and Agri-Food Canada *
- 6 Public Health Agency of Canada *
- 7 Businesses *

Levels marked with * are randomized

A2

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. Reducing risks to food safety, plant health and animal health are CFIA priorities, and the health and safety of Canadians are key forces behind the design and development of CFIA programs.

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'.

- 7 7 - Very familiar
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 - Not familiar at 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 Podcasts *
- 4 A digital assistant (for example, Alexa, Siri, Google) *
- 5 Traditional Media (newspapers, TV, radio) *
- 6 Internet (includes online news sites but not social media) *

- 7 Direct contact from CFIA (includes CFIA social media and visiting the CFIA website) *
- 8 Not applicable - have not seen, heard or read anything about the CFIA (Exclusive)

Levels marked with * are randomized

A3a Show if A3 1 to 7

Select any of the following that apply to you:

Select all that apply

- 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 I subscribe to the Chronicle 360
- 8 I have listened to the Inspect and Protect podcast
- 9 In person interaction with a CFIA employee
- 10 I have a friend or family member who works at the CFIA

T3 Show if A3a CFIA Family or Friend

Unfortunately for this survey we need people who are not connected with the CFIA.

Please wait while your browser redirects to your panel.

Status Code: 503

A3ai Show if A3a Level 1 through 8 selected

Using a scale of 0-10 where 0 is "not at all satisfied" and 10 is "very satisfied". How satisfied are you...

1. that the CFIA issues food recall notices in a timely manner?(Show if A3a 1 CFIA recall notices)
2. with the CFIA handling of the food safety or labelling concern you reported? (Show if A3a 2 food safety labelling)
3. with the CFIA content on social media? (Show if A3a 3 CFIA social media)
4. with the usability of the CFIA website? (Show if A3a 4 Visited CFIA website)
5. with the CFIA phone interaction you had? (Show if A3a 5 CFIA by phone)
6. with the CFIA email or website interaction you had? (Show if A3a 6 CFIA by email)
7. with the podcast Inspect and Protect? (Show if A3a 8 Inspect and Protect podcast)
8. with the Chronicle 360 article? (Show if A3a 7 Chronicle 360)

- 10 10 - Very satisfied
- 9 9
- 8 8
- 7 7
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1
- 0 0 - Not at all satisfied

A4 Show if A3 NOT Not applicable

Thinking about what you have seen, read or heard, about the Canadian Food Inspection Agency (CFIA), indicate how well you understood 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'.

1. Word of mouth (friends, family, etc.) (Show if A3 Word of mouth)
2. Social media (not including CFIA social media) (Show if A3 Social Media)
7. Podcasts (Show if A3 Podcasts)
3. A digital assistant (for example, Alexa, Siri, Google) (Show if A3 A digital assistant)
4. Traditional Media (newspapers, TV, radio) (Show if A3 Traditional Media)
5. Internet (includes online news sites but not social media) (Show if A3 Internet)
6. Direct contact from CFIA (includes CFIA social media and visiting the CFIA website) (Show if A3 Direct contact)

- 7 7 - Understood completely
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 - Not at all

Ax

When you review the following list of government and non-government organizations, how favourable of an impression do you have overall of each organization?

1. Canadian Food Inspection Agency (CFIA) *
2. Health Canada *

3. Canada Revenue Agency *
4. Canada Border Services Agency *
5. Canadian Transportation Agency *
6. Public Health Agency of Canada *

Levels marked with * are randomized

- 7 7 - Extremely favourable
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 - Not favourable at all
- 8 I don't know / Not sure

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'.

- 7 7 - Trust completely
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 - Do not trust at 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'.

- 7 7 - Trust completely
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2

- 1 1 - Do not trust at 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'.

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

A7a

When it comes to verifying that food sold in Canada is safe, how well do you believe the Canadian Food Inspection Agency (CFIA) 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'.

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

A7b

When it comes to safeguarding plant health (regulating invasive insects, plants and other plant pests), how well do you believe the Canadian Food Inspection Agency (CFIA) 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'.

- 7 7 - Doing well
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2

- 1 1 - Not doing well

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 (CFIA) 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'.

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

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'.

1. The CFIA looks out for the best interests of Canadians *
2. The CFIA is effective in enforcing food safety regulations *
3. All businesses are treated fairly by the CFIA *
4. Food recalls are an example of the food system working *
5. I understand what the CFIA does *
6. Getting more information about food, plant or animal safety from the CFIA is easy *
7. CFIA veterinaries are among the best in their field *

Levels marked with * are randomized

- 7 7 - Agree completely
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 - Disagree completely
- 8 Not sure/Not applicable

Section CFIA Message Evaluation

B1, B1a, B2, B3, B4, B6, B7, B8, C1, C2

Page

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. 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 *
2. As a science-based regulator, the CFIA is believable when it issues a statement *
3. The CFIA issues food recall warnings in a timely manner *
4. The CFIA enforces regulations that helps ensure animals are transported humanely *
5. The CFIA enforces regulations that help ensure Canada's plant resources are protected *
6. CFIA enforcement activities are strong enough to encourage companies to comply with the regulations *
7. CFIA helps to facilitate international trade *

Levels marked with * are randomized

- 7 7 - Agree completely
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 - Disagree completely

B1a

Please review the list below and rank what you personally feel the top 3 priorities of the CFIA should be.

- _____ Verifying safe food is sold to consumers *
- _____ Verifying importers do not import contaminated or fraudulent foods *
- _____ Helping to keep international markets open to Canadian food, plant and animal products *
- _____ Helping to keep foreign animal diseases out of Canada *
- _____ Helping prevent the spread of plant pests and animal diseases in Canada *
- _____ Verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada *
- _____ Helping prevent plant pests and invasive species from entering Canada *

Levels marked with * are randomized

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 (before this survey) that the CFIA was responsible for regulating the importation 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.

Select all that apply

- 1 Efficient *
- 2 Dedicated *
- 3 Punitive *
- 4 Transparent *
- 5 Consistent *
- 6 Caring *
- 7 Innovative *
- 8 Trusted *
- 9 Global leader *
- 10 Informative *
- 11 Responsive *
- 12 Service oriented *
- 13 Scientific *
- 14 Respectful *
- 15 Fair *
- 16 Collaborative *
- 17 None of the above (Exclusive)

Levels marked with * are randomized

B6

From the following list, indicate which of the following situations you believe the CFIA is involved in?

Select all that apply

- 1 Checking food products being imported into the country *

- 2 A restaurant has a complaint of a dirty kitchen *
- 3 A person gets food poisoning from cooking and eating undercooked meat *
- 4 Checking plant products coming into the country *
- 5 Insects, fungus and other pests that affect plant health, but do not have a direct impact on the ability of consumers to eat the plant as food *
- 6 A dog being brought into Canada by a vacationing family *
- 7 A dog being brought into Canada to be permanently adopted by a person living in Canada *
- 8 Live animals being exported from Canada to other countries for reasons other than to be consumed as food *
- 9 Live animals being exported from Canada to other countries to be consumed as food *

Levels marked with * are randomized

B7

In thinking of the food that you consume, what percentage do you think has been inspected by the CFIA?

Minimum: 0, Maximum: 100

_____ %

B8

Were you aware (before this survey) that the CFIA plays an important role in preventing the spread of pests such as Japanese beetle in Vancouver and emerald ash borer in eastern Canada?

- 1 Yes
- 2 No
- 3 Not sure

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

C2

Which of the following descriptions would you say describe you, and to what extent?

1. Foodie *
2. Camper *
3. Cottager *
4. Hobby farmer *

5. Gardener *
6. Nature enthusiast *
7. Hiker *
8. Outdoorsy *
9. Pet owner *
10. Animal lover *

Levels marked with * are randomized

- 3 Describes me completely
- 2 Describes me somewhat
- 1 Does not describe me at all
- 4 Don't know/Not sure

Section Demographics

X1, X2, X3, X4, X5, X6, X7, X8, X9, End1

Page

X1

The following information is collected for classification purposes only.

Please indicate your gender.

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

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 Graduate degree above bachelor's level
- 8 Prefer not to answer

X3

What language do you speak most often at home?

- 1 English
- 2 French
- 3 Other (specify): _____

- 4 Prefer not to answer

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

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
- 2 No

X6 Show if X5 Yes

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

Select all that apply

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

X7 Show if X5 Not Indigenous

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

X8 Show if X7 Yes

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.

Select 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)
-

X9

What are the first three digits of your postal code?

- 8 Prefer not to answer

End

Those are all our questions for you today.

Business Questionnaire

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 how you see the Agency and to share what you think about the CFIA and its services. This survey will help the Agency improve its program delivery and communication with businesses. It is also voluntary and responses will remain confidential and anonymous. There is no attempt to market or sell anything. It will take approximately 20 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** and you will be able to continue the survey in the same spot where you left off.

To take the survey in an alternative format, please contact support@e54surveys.com (<mailto:support@e54surveys.com>).

To verify the legitimacy of this survey you can contact the lead researcher at Patterson Langlois john.patterson@plinc.ca (<mailto:john.patterson@plinc.ca>) or the Canadian Food Inspection Agency (CFIA) at CFIA.information.ACIA@canada.ca (CFIA.information.ACIA@canada.ca).

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S3

What industry segments does your company operate in?

Select all that apply

Food businesses:

- ₁ Food preparation (Show if Sample NAICS Food business)
- ₂ Food importing (Show if Sample NAICS Food business)
- ₃ Food exporting (Show if Sample NAICS Food business)
- ₄ Interprovincial trade of food (Show if Sample NAICS Food business)
- ₅ Food manufacturing (Show if Sample NAICS Food business)
- ₆ Farming (Show if Sample NAICS Food business)

- 7 Food/beverage manufacturing or processing (Show if Sample NAICS Food business)
- 8 Meat and poultry slaughter (Show if Sample NAICS Food business)
- 9 Other (specify) _____
(Show if Sample NAICS Food business)
- Animal health businesses:
- Live animal importing (Show if Sample NAICS Animal business)
- 10 Live animal exporting (Show if Sample NAICS Animal business)
- 11 Germplasm (genetic material) import (Show if Sample NAICS Animal business)
- 12 Germplasm (genetic material) export (Show if Sample NAICS Animal business)
- 13 Animal product or by-product importing (Show if Sample NAICS Animal business)
- 14 Animal product or by-product exporting (Show if Sample NAICS Animal business)
- 15 Live animal domestic management (for example, producers, assembly yards, includes terrestrial and aquatic) (Show if Sample NAICS Animal business)
- 16 Animal product or by-product preparation or manufacture (including renderers and skin tanners) (Show if Sample NAICS Animal business)
- 17 Animal feed (including feed mills and feed sellers) (Show if Sample NAICS Animal business)
- 18 Pet food import (Show if Sample NAICS Animal business)
- 19 Pet food export (Show if Sample NAICS Animal business)
- 20 Animal transportation (including freight forwarders) (Show if Sample NAICS Animal business)
- 21 Artificial insemination centres (Show if Sample NAICS Animal business)
- 22 Veterinary biologics (Show if Sample NAICS Animal business)
- 23 Horse owners (Show if Sample NAICS Animal business)
- 24 Small flock owners (including bird collections) (Show if Sample NAICS Animal business)
- 25 Other (specify) _____
26 (Show if Sample NAICS Animal business)
- Plant health businesses:
- Fertilizers and supplements (Show if Sample NAICS Plant business)
- 27 Forestry products (Show if Sample NAICS Plant business)
- 28

- Horticulture (greenhouse, nursery, bulbs, fruit trees, grapevines) (Show if Sample NAICS Plant business)
29
- Crops (grains, oilseeds) (Show if Sample NAICS Plant business)
30
- Potatoes (Show if Sample NAICS Plant business)
31
- Seed growing (other than seed potato) (Show if Sample NAICS Plant business)
32
- Seed establishments/ handling (Show if Sample NAICS Plant business)
33
- Plant breeding (Show if Sample NAICS Plant business)
34
- Plant breeders' rights (intellectual property) (Show if Sample NAICS Plant business)
35
- Invasive species prevention and management (Show if Sample NAICS Plant business)
36
- Other (specify) _____
37 (Show if Sample NAICS Plant business)

S4

Does your business sell products online?

- 1 Yes
- 2 No
- 3 Not sure

S4a Show if S4 Yes

Approximately what percentage of your business' total revenue comes from online sales?

Minimum: 0, Maximum: 100
_____ %

S4b Show if S4 Yes

Does your business have its own e-commerce site, or does it use other platforms (for example, Amazon)?

- 1 Own site
- 2 Other platform
- 3 Both
- 4 Don't know / not sure

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 your company 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

AX

When you review the following list of government and non-government organizations, overall, how **favourable** of an impression do you have of each organization?

Please use the 7-point scale below for your response. A rating of 7 indicates 'Extremely favourable'. A rating of 1 indicates 'Not favourable at all'.

1. Canadian Food Inspection Agency (CFIA) *
2. Health Canada *
3. Canada Revenue Agency *
4. Canada Border Services Agency *
5. Canadian Transportation Agency *
6. Public Health Agency of Canada *

Levels marked with * are randomized

- 7 7 Extremely favourable
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2
- 1 1 Not favourable at all

A4

Please indicate how much your company 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

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

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 it 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 it 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. The CFIA does business in the same way for everyone 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 information on regulations *
8. Information received from the CFIA helps to stop 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 industry's specific regulatory priorities *
14. It is easy to have open and honest dialogue with the CFIA about regulatory priorities *
15. The CFIA provides better service compared to food inspection agencies in other developed countries *
16. The CFIA is sensitive to the reality of how things work in your specific industry *

Levels marked with * are randomized

- 7 Strongly agree
- 6
- 5
- 4 Neither agree nor disagree
- 3
- 2
- 1 Strongly disagree
- 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 Innovative *
- 2 Efficient *
- 3 Informative *
- 4 Scientific *
- 5 Transparent *
- 6 Fair *
- 7 Dedicated *
- 8 Consistent *
- 9 Punitive *
- 10 Caring *
- 11 Trusted *
- 12 Responsive *
- 13 Service oriented *

- ₁₄ Respectful *
- ₁₅ Collaborative *
- ₁₆ Global leader *
- ₁₇ None of the above (Exclusive)

Levels marked with * are randomized

A9

Consider your interactions with the CFIA and its leadership structure. Select the responses that you feel describe each:

1. The CFIA President *
2. CFIA senior management *
3. CFIA inspectors/enforcement staff *
4. Call centre staff *

Levels marked with * are randomized

- ₁ Is credible *
- ₂ Is responsive *
- ₃ Is reliable *
- ₄ Don't know / Not sure

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 is contributing to the health and well-being of Canadians, the environment and the economy by protecting Canada's food, animals and plants.
2. As a science-based regulator, the CFIA is believable when it issues a statement.
3. The CFIA issues food recall warnings in a timely manner.
4. The CFIA enforces regulations that help to ensure that animals are transported humanely.
5. The CFIA enforces regulations that help to ensure that Canada's plant resources are protected.
6. CFIA enforcement activities encourage companies to comply with the regulations.

- ₇ 7 Strongly agree
- ₆ 6
- ₅ 5
- ₄ 4 Neither agree nor disagree

- 3 3
- 2 2
- 1 1 Strongly disagree

B1a

Please review the list below and rank what you personally feel the **top 3** priorities of the CFIA should be.

- _____ Verifying safe food is sold to consumers *
- _____ Verifying importers do not import contaminated or fraudulent foods *
- _____ Helping to keep international markets open to Canadian food, plant and animal products *
- _____ Helping to keep foreign animal diseases out of Canada *
- _____ Helping prevent the spread of plant pests and animal diseases in Canada *
- _____ Verifying the safety and quality of feed, fertilizer, veterinarian biologics, and seeds in Canada *
- _____ Helping prevent plant pests and invasive species from entering Canada *

Levels marked with * are randomized

B2

In your opinion, how transparent do you think the CFIA is when it comes to **assessing** non-compliance with regulations?

Please answer on a scale of 1-7 with 1 being not at all transparent, and 7 being very transparent.

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

B3

How transparent do you think the CFIA is when it comes to **reporting** (publishing) non-compliance?

Please answer on a scale of 1-7 with 1 being not at all transparent, and 7 being very transparent.

- 7 7 Very transparent
- 6 6
- 5 5
- 4 4
- 3 3
- 2 2

- 1 1 Not at all transparent

B4

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

Select all that apply

- 1 Mailed documents
- 2 Telephone communications
- 3 Email (including CFIA Listservs)
- 4 Portal notices in My CFIA
- 5 Personal interaction with a CFIA representative
- 6 CFIA website
- 7 Social media
- 8 Podcasts
- 9 Chronicle 360
- 10 Through an industry association
- 11 Other (specify): _____
- 12 Not applicable: I have never received or do not remember receiving information from the CFIA (Exclusive)

B5

Please rate how well your company understands the information when it is 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 B4 1 Mailed document)
2. Telephone communications (Show if B4 2 Telephone commu)
3. Email (including CFIA Listservs) (Show if B4 3 Email including)
4. Portal notices in My CFIA (Show if B4 4 Portal notices)
5. Personal interaction with a CFIA representative (Show if B4 5 Personal intera)
6. CFIA website (Show if B4 6 CFIA website)
7. Social media (Show if B4 7 Social media)
8. Podcasts (Show if B4 8 Podcasts)
9. Chronicle 360 (Show if B4 9 Chronicle 360)
10. Through an industry association (Show if B4 10 Through an indu)
11. <<B4.specify(11)>> (Show if B4 11 Other specify)

- 7 7 Understands completely
- 6 6
- 5 5

- 4 4
- 3 3
- 2 2
- 1 1 No understanding at all

B6

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

B7 Show if B4 answered 1 to 11

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

1. Mailed documents (Show if B4 1 Mailed document)
2. Telephone communications (Show if B4 2 Telephone commu)
3. Email (including CFIA Listservs) (Show if B4 3 Email including)
4. Portal notices in My CFIA (Show if B4 4 Portal notices)
5. Personal interaction with a CFIA representative (Show if B4 5 Personal intera)
6. CFIA website (Show if B4 6 CFIA website)
7. Social media (Show if B4 7 Social media)
8. Podcasts (Show if B4 8 Podcasts)
9. Chronicle 360 (Show if B4 9 Chronicle 360)
10. Through an industry association (Show if B4 10 Through an indu)
11. <<B4.specify(11)>> (Show if B4 11 Other specify)

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

B8

When your company assesses the services offered by the Canadian Food Inspection Agency (CFIA), which elements are the most important? Please rank the top 3 service elements.

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 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 CFIA representative for clarification *
- _____ Services are available when I need them *
- _____ Other

Levels marked with * are randomized

B8other Show if B8 Other in top 3

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

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

B9

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

Select all that apply

- ₁ Mailed documents *
- ₂ Telephone communications *
- ₃ Virtual chat from the CFIA website or My CFIA *
- ₄ Email (including CFIA Listservs) *
- ₅ Portal notices in My CFIA *
- ₆ In person interaction with CFIA representative *
- ₇ CFIA website *
- ₈ Social media *
- ₉ Podcasts *
- Chronicle 360 *

₁₀ Through an industry association *

₁₁ Other (Specify): _____

₁₂

- Not applicable: I wish the CFIA would not send me any future communications
99 (Exclusive)

Levels marked with * are randomized

B10

When trying to understand new requirements and regulatory priorities, what is the best way to have more open and clear discussions with CFIA regulators?

- 1 Informal quarterly consultations *
- 2 Formal consultations *
- 3 Industry association events *
- 4 Other (specify): _____
- 99 Not applicable: I wish the CFIA would not send me any future communications

Levels marked with * are randomized

B11

If the CFIA was holding webinars, what topics would drive the most interest?

Select all that interest you.

- 1 How to use MY CFIA portal to apply for licences and other permissions (for example, export certificates, permit to import, certificate of free sale) *
- 2 Preventive control plans *
- 3 Traceability *
- 4 Import requirements *
- 5 Labelling *
- 6 Other (specify): _____
- 7 Don't know/Prefer not to say (Exclusive)

Levels marked with * are randomized

B12

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

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

- 8 No comment

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 United States of America
- 15 Outside of the United States of America or Canada

X6

Please check the different regions where your company offices or facilities are located and 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 United States of America
- 15 Outside of the United States of America 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

X8f

Would you consider the organization to be a family-owned organization?

- ₁ Yes
- ₂ No
- ₃ Don't know / Not sure

X9

What 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

When is 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 (Exclusive)

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

Approximately, what percentage of individuals might identify as a visible minority*?* in senior management (including owner) roles?

Please note your percentage within the following range: a minimum of “0” and a maximum of “100.”

? The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported. To better understand the composition of leadership within Canadian food businesses, we are asking about race and other demographic characteristics of the leadership group. An estimate is fine for this question and if you do not know that is fine as well.

Minimum: 0, Maximum: 100

_____ %

- _{.9} I do not know

X15

Please describe the approximate percentages of individuals with a senior management position who identify as female*?*

Please note your percentage within the following range: a minimum of “0” and a maximum of “100.”

? The Government of Canada has a policy that is designed to ensure that the diverse population of Canada is equally supported. To better understand the composition of leadership at Canadian food businesses we are asking about gender and other demographic characteristics of the leadership group. An estimate is fine for this question and if you do not know that is fine as well.

Minimum: 0, Maximum: 100

_____ %

- _{.9} I don't know

ASK X16 IF THE FOLLOWING CRITERIA ARE MET:

S3 = CODES 16, 21, 24, 25, OR 27-36

AND A6B/A6C = 5 OR LESS (IF S3 = 16, 21, 24, OR 25, REFER TO A6C, IF S3 = 27-36, REFER TO A6B).

X16

Thank you for your time. The CFIA has contracted an independent research firm for this questionnaire and to conduct short one-hour interviews with representatives of some of the companies that gave answers like yours. These interviews have the objective of better understanding your responses to the survey and would be scheduled on Zoom at a time of your convenience, for which you would be compensated \$100 for your time. Are you open to being contacted for such an interview? You can trust that the interview will be handled by an objective researcher and your participation will not be known to the CFIA. The interview would have to be done in the next few weeks. This is a request – you may also decline without concern, but we would value your input

- ₁ Yes, I would be open to being contacted about a follow-up interview
- ₂ No, please do not contact me for a follow-up interview

ASK X17 IF X16 = CODE 1 (YES), OR ELSE PROCEED TO THANK YOU SCREEN.

X17

Please provide your contact information so that we may contact you for a follow-up interview:

Telephone number: 9-DIGITS

Email Address: ENSURE VALID EMAIL ADDRESS IS PROVIDED

SCREENER/DISCUSSION GUIDE OUTLINE

Dates: Commencing January 2021, dates TBD
Client: Canadian Food Inspection Agency (CFIA)
Locations: National: Mini Focus Groups with Canadian Consumers on Food Safety, Plant & Animal Health and the Agency's reputation

Qualitative research with consumers is required to understand how and in what ways they evaluate the safety of the Canadian food supply, the health of Canadian crops and animals, and the role that the CFIA plays in that. Qualitative data will be collected through virtual mini focus groups and that reflect the diversity of Canadians.

Research Objectives:

Explore Canadians' understanding of food safety.
Explore Canadians' understanding of animal health.
Explore Canadians' understanding of plant health.
Explore Canadians' understanding of the CFIA and its reputation.
Understand what sources are contributing to these questions and how.

SPECIAL INSTRUCTIONS TO RECRUITERS:

RECRUIT 5 for 4-5 to show

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 Government of Canada. I am looking for someone to participate in some important research commissioned by the Government on the our food supply, including crops, animals and the food that's ready to eat in stores. Can you help me? I need to speak to the person in your household that usually does most of the food shopping. If that's not you, could 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

My name is _____ and I work for Patterson, Langlois Consultants, a research company working on behalf of the Government of Canada. I am looking for someone to participate in some important research commissioned by the Government on the safety of our food supply, including crops, animals and the food that's ready to eat in stores. 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 We are looking for someone in your household that normally does the food shopping? Is that you?

- 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? Not surprisingly, these interviews will be conducted on Zoom and take about 90 minutes with the interviewer and up to 4 other Canadians: You will not be asked anything of a confidential or sensitive nature)

- Yes 1
No 2 → **THANK AND END**

Q.3 Can you tell me: Does anyone in your household have any special dietary needs like celiac, a food allergy, a food intolerance of some kind?

- Yes 1 → Recruit for groups 1 and 8 and skip to Q5A
No 2 → **Continue**

Q.4 Which of the following does the best job of describing your food preferences?

- 1 We buy local, fresh and organic whenever we can 1 → Recruit for group 2, 4 and 6 and 8.
2 We usually eat what we can afford or what's on sale 1 → Recruit for group 1, 3, 5
3 What eat for pleasure. Price, organic etc. don't really matter 4 → Recruit for group 7
4 Other: please probe and allocated as appropriate

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 5 or more studies in the last 5 years, or within the last month. Skip to Q7A.
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 safety and how you buy your food. This research is being done on behalf of the Government of Canada. There is no intention to sell you a product or to change your views about anything, but rather to gather opinions to help the Government better understand and respond to the needs of Canadians. 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 \$150 compensation at the end of the discussion, but we will expect you to spend about half an hour doing preparing for the group beforehand. Could we count on you?

- Yes 1 → **CONTINUE**
No 2 → **THANK AND END**

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

Q7B: HOMEWORK TO BE DONE BEFORE THE GROUP:

Here's the little bit of homework we expect from you – but don't worry, this isn't like school! NO TESTS NO GRADES! It should be fun! I'm going to read this to you and then we will email you a copy.

Imagine that a family that has just moved in next door from a far away place. In your very first conversation with the mother, she shares with you that she's worried about how her family is going to adjust to Canadian food. Some in her family have some intolerances that she hasn't quite figured out but she sees issues across the board – in some basic plant proteins, meats and even processed foods.

Your mission: You want to give her the information she needs to hear about the safety of Canada's crops, meat and the other food products sold in stores. This family speaks English as a second language so everything will need to be simple, but you want to be thorough (cover all of the concerns) and leave her with the information she needs to follow up on her own if she wants to.

To do this, please spend 20-30 minutes investigating for her and write down the main points and information sources on one page.

We'll expect you to have this done and send to us a day before the groups, and then we will discuss during the group. Is all of that clear?

Yes 1 → CONTINUE
No 2 → CLARIFY AS NECESSARY

SKIP TO CONTACT DETAILS

Q.8 Great! The interview will be on Zoom with a moderator.

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

There is no intention to sell you a product or to change your views about anything, but rather to gather opinions help the Government perform 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 \$150 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 sure to send your one-page document to us a day before and be ready 15 minutes prior to the start of your interview. We will remind you if you haven't done your homework – and you will not be able to participate if you haven't done it. 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:

Qualitative Discussion Guide - Consumer

Introduction (20 min.)

1. **Introduction of moderator, name and type of research firm:** (e.g. John representing the marketing research firm Patterson Langlois)
2. **Set up:** We're here to talk about the safety of Canada's food supply. The purpose of these discussions is to help the Government of Canada better understand how Canadians understand safe food and their trust that Canada's food supply is indeed safe. Your input is important and very much appreciated.
3. **Explanation of the 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.
 - **Expression of opinions:** there are no wrong or right answers, no expectation that you agree with each other.
 - **Length:** we will be here about 90 minutes.
 - **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 and your household.

Probes:

- Size and composition of family
- Major preoccupations about food
- Allergies, dietary and other food related imperatives

PART 1: Food in your life (15 minutes max)

Let's start with a simple question: What does "good food" and "bad food" mean in your house?

Keeping safety-related dimensions for later, validate where and how participants share common food related values. **INVENTORY FOOD DIMENSIONS FOR FOLLOW UP**

DISCUSSION

PROBES (if not brought up):

How much of what you consider "good food" is determined by:

- Price
 - Provenance
 - Seasonality
 - Food group (protein, starches, sugars, etc)
 - Your family's background
 - Variety (prone to stay with what your family likes or try new things a lot?)
 - Size and location of producers
 - Dietary implications (calories, fat content, etc.)
 - Taste
 - Freshness
 - Etc.
-
- Are you adventurous with food or tend to be more conservative?
 - Do you care a lot about food or is it just something you take care of with minimum effort
 - Is the cost of food a big deal or not?
 - Do you read, think or worry about ingredients? What are you looking for?
 - What would I learn from watching you buy food? Where do you go? What guides those choices? Etc.

PART 2: Homework Exercise (30-45 minutes):

Ok, let's talk about your homework exercise. By the way, I have looked at your one-pagers and will have some questions, but first, can someone start us off by summarizing what you would pass on to your new neighbors?

Extend the discussion by having everyone take a turn, sharing their own discoveries and noting the discrepancies and similarities. Once the process has run its course, compare, contrast and summarize.

Probes:

- Adjectives to describe food safety and why they were chosen.
- What did they end up saying about plant health? Why that? Why not more?
- What did they end up saying about animal health? Why that? Why not more?
- What, if any institutions did they include? (Inventory)
 - Attributes used to describe?
 - Why those? Why not others?
- What sources of information did they encounter? How...
 - Do they naturally qualify those sources?
 - Accessible?
 - Readable?
 - Authoritative?
 - What other attributes come up and why?
- Summarize: Differences and similarities with respect to:
 - Plant health
 - Animal health
 - Food safety generally
 - Institutions responsible and their reputations
 - Other notable aspects
 - Sources of information used (readability, etc)

PART 2 - Additional Topics :

- What is a **food recall**? When do they happen? What do they mean about the safety of Canada's food supply? Is this a sign that the system is working or not working? What kind of dangers to Canadians' health do you associate with a recall?
- What kind of dangers to Canadians' health do you associate with a recall? How do you find out about food recalls? For example, through news media (TV, newspapers, radio)? Social media? Do you subscribe to the CFIA's food recall alerts?
- Has anyone heard about restrictions about seeds and borders or traveling overseas with pets?
- Is there a **difference between "safe food" and "unhealthy food"**? what about between "unsafe" and "poor quality"? Where do they intersect? How has your thinking about this changed over time, if at all? Have you heard anything lately that caused you to reconsider any of this?
-

WRAP UP

So by now I suppose it's clear that this research is being commissioned by the CFIA. What do you think we've learned about this agency, its reputation and the how reputation is being communicated?

PROBES along the following topics:

- **Specific Role:** What is it accountable for?
- **Comprehensiveness:** How wide and broad is its mandate?
- **Organization:** What do you understand of how the CFIA is structured and how it operates? How long has it been there? How big is it? Etc.
- **Credibility?**
- **Authorship:** How much it owns it's communications and how much of it seems colored by other sources?
- **Institutional priority topics and audiences:** As you recall all of the things we've discussed, what do you think the CFIA is focused on – either in terms of issues or audiences? What do we think about that?
- **Any additional topics, concerns or issues?**

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.

THANK AND TERMINATE

Qualitative Discussion Guide - Business

SUMMARY

Dates: commencing March 2022, dates TBD

Client: Canadian Food Inspection Agency (CFIA)

Locations: national in-depth interviews and focus groups with 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 plant and animal business lines.
- Examine thoughts on CFIA messages and brand attributes and service quality
- Measure how stakeholders access and assess CFIA services
- Assess satisfaction with existing communication tools and tactics
- Assess preferred methods of communication for each stakeholder segment

DISCUSSION GUIDE

Introduction (10 min.)

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

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 how individual companies experience the regulations and how companies view the CFIA as a regulator. More specifically, your input from these discussions will assist future communications and messages the CFIA uses to deliver on their mandate. 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 how individual companies experience the regulations and how companies view the CFIA as a regulator. More specifically, your input from these discussions will assist future communications and messages the CFIA uses to deliver on their mandate. Your input is important and very much appreciated.

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.**
2. **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.
 - 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 in your business required since COVID

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.

Probe: Explore regulatory issues, encourage flow of challenges until run out: Inventory topics and take them up individually.

EXAMPLE PROBES FOR CHALLENGES IDENTIFIED:

- Is this something everyone in your industry 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?
- 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 permanent versus those that may be time limited?
- 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 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 your experience been? Level of satisfaction?**
- **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) have 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?)

Re-state list of regulatory challenges not mentioned previously: 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,:

- 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?

PART 3: Communications

If I asked you to describe CFIA communications in one-word, what would it be? [Keep list]

If we looked at the traditional sense of a BRAND how would you describe the CFIA brand? What pops into your mind when you hear CFIA?

What is the most effective way for CFIA to get messages to you?

What types of communications are most effective in breaking through the clutter?

What is your preferred method of communication from the CFIA?

Probes:

- **Are messages professional?** Consistent?
- **Guidance?** How do you find the guidance provided by the CFIA (check on where or how they get guidance on regulations?)
- **Impact of messages**, impression, thoughts on brand attributes and service quality

ADDITIONAL TOPICS TO BE PROBES IF NOT MENTIONED

- Introduction of any new legislation or updates to the regulations they must follow (e.g., Fertilizer regulations or Animal Transport).
- Follow up for both 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.

END