



Canadian Food  
Inspection Agency

Agence canadienne  
d'inspection des aliments

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

## Final report

Prepared for the Canadian Inspection Agency

Supplier name: Patterson, Langlois Consultants

Contract number: 39903-210663/001/CY

Contract value: \$207,277.17

Award date: December 9, 2021

Delivery date: March 31, 2022

Registration number: POR # 043-21

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

[Information@inspection.gc.ca](mailto:Information@inspection.gc.ca)

Ce rapport est aussi disponible en français.

Canada 

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

Prepared for the Canadian Food Inspection Agency  
Supplier name: Patterson, Langlois Consultants  
March 2022

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique auprès des entreprises et des consommateurs aux fins du sondage annuel sur la réputation de l'ACIA : 2021-2022

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.

This publication may be reproduced for non-commercial purposes only. Prior written permission must be obtained from the Canadian Food Inspection Agency. For more information on this report, please contact the Canadian Food Inspection Agency at: [Information@inspection.gc.ca](mailto:Information@inspection.gc.ca)

or at:

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

**Catalogue Number:** A104-208/2022E-PDF

**International Standard Book Number (ISBN):**  
978-0-660-44160-3

Related publications (registration number): 978-0-660-44161-0  
A104-208/2022F-PDF (Final Report, French)

© Her Majesty the Queen in Right of Canada, as represented by the Minister of Health, 2022

## Political Neutrality Statement

I hereby certify as a Representative of Patterson, Langlois Consultants that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed: Date: March 28, 2022



---

John Patterson, Principal  
Patterson, Langlois Consultants

# 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.