

Public Opinion Research –Data analysis (Individual Depth Interviews)

2023

Executive Summary

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Canada 

This report presents the results of research and analysis conducted on behalf of the Canadian Food Inspection Agency. This study focuses on several years of qualitative and quantitative data and a new series of individual in-depth interviews conducted in March 2023 with Canadian consumers and regulated food businesses.

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1. Executive summary

1.1 Background and objectives

The CFIA has collected a considerable amount of data on the opinions and behavior of consumers and businesses through public opinion research (POR) from 2019 to 2021. This data has been reexamined and we have found additional links and insights that will assist the development of communications, policies, and programs. This data also shows that consumer and business stakeholders differ in how they interpret messages from the Agency about compliance promotion, food safety and other topics.

The overall goal of this project was to analyze business and consumer survey responses about the CFIA and communications and validate what we have learned through a series of in-depth interviews with business operators and consumers. Ultimately, the goal is to help the Agency improve its business and consumer communications strategies.

Agency videos and Instagram posts were used as talking points during these qualitative interviews.

1.2 Summary of methodology used

Analysis of existing data

Most of the data considered in this exercise is from existing POR that was done with both businesses and consumers commissioned by the CFIA between 2019 and 2022. This data is from research on a variety of topics including food safety, the CFIA's reputation, food fraud, African swine fever (ASF), online purchases of regulated products, and elements of compliance promotion. We looked at data from both quantitative and qualitative research projects. Links to the specific reports are referenced in the annex.

Newly acquired data through qualitative public opinion research

Additional qualitative work was conducted in March 2023 with representatives from CFIA-regulated Canadian businesses. This consisted of 5 in-depth interviews and 6 with Canadian consumers of some 60-90 minutes in length. Recruiting was designed to ensure the participation of diverse businesses and Canadians. French (2) and English-speaking (9) participants were recruited and interviewed on Zoom. Consumers were offered an honorarium of \$100 and business representatives were offered \$200.

The contract value for this contract was \$28,035.30, of which approximately \$13,200 was directed towards the in-depth interviews. The remaining budget was for the analysis of secondary (previous) data, provided under separate cover.

1.3 Overview of findings

Businesses

This analysis allows for continued development of the segmentation framework proposed in 2021 to illustrate how communication can affect compliance. This framework is a matter of grouping businesses according to the degree of their interaction with the Agency. This way of dividing accounts for businesses' size, their tenure --- which refers to how long and how well established they are as a business --- as well as important aspects of their organizational structure and finally the degree of risk their operations pose to the food supply chain. This framework proposes 4 distinct groups or segments.

The first group is composed of businesses that are closely supervised by CFIA and would include many typically larger companies in terms of the number of employees and income. This segment can be referred to as "core" as it describes where the Agency has been focused in the past. The next group is somewhat the opposite of the core group --- it includes companies that have fewer interactions with the Agency because they pose less risk to the food supply chain. This group would include many of the smaller businesses both in the numbers of employees and revenues, and many of that are new. This group is the "peripheral" segment because it often has limited interaction with the Agency. The third group is composed of businesses that fall naturally in between the previous two. These are those that have more Agency contact than the peripheral yet not as much as the core group. This group is the "middle" segment. Finally, a "prospective" group would be comprised of businesses just outside the Agency's current oversight, but who share plans or ambitions that suggest they may eventually fall under supervision. There has been limited research conducted with this group but enough to draw some conclusions.

Each of these groups has distinctive characteristics, behaviors and information needs. The core group benefits quite clearly from having strong and numerous connections to the Agency. The peripheral group is generally satisfied with CFIA communications, although they appear to struggle to find specific kinds of information when the need comes up. The middle group seems in many ways to struggle the most: it is moderately regulated but seems less built up with structures and resources for dealing with the Agency, particularly where issues of interpretation are involved. The prospective group --- which has not so far been the focus of the Agency's POR --- is perhaps particularly challenged to get the answers they want in order to even enter the sector. These findings and their implications are provided in the detailed results further in this report.

Consumers

Consumers are also differentiated and can be divided according to their specific concerns, values and motives. While many participants continue to view safe food as a given --- mostly due to not having heard about any emergencies --- others have specific concerns and expectations. There is a distinctive group of consumers with food allergies and other intolerances. Another group is inclined to be concerned about the food system and how it affects Canadian society, and our environment and sees food safety as a matter of both long

and short-term health. We have found that many of these participants have different reactions to CFIA messaging and many signs that messages targeted specifically to these distinct target audiences have the potential to improve the Agency's reputation and foster more informed faith in the safety of Canada's food supply chain. The challenge, first, is for the Agency to capture and segment Canadians accordingly.