



CFIA Public Opinion Research for the Plant Business Line 2023 to 2024

Executive summary Prepared for the Canadian Food Inspection Agency

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Canada 

CFIA POR for the Plant Business Line 2024 – Final report

Prepared for the Canadian Food Inspection Agency by Environics Research

Supplier name: Environics Research
March 2024

This public opinion research report presents the results of a quantitative and qualitative research study conducted by Environics Research on behalf of the Canadian Food Inspection Agency, comprising one online survey with n= 1026 Canadian residents, one telephone survey with n=300 plant-related businesses, and a series of 20 in-depth interviews conducted online or via telephone with potato farmers across Canada, with special attention to those located in PEI. The telephone survey with businesses was conducted from February 15th to February 29th, 2024; the online survey with Canadians was conducted from March 11th to March 20th, 2024, and the in-depth interviews took place from February 12th to March 26th, 2024.

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Executive summary

A. Background and objectives

As the federal entity responsible for safeguarding food, animals and plants, which enhances the health and well-being of Canada's people, environment and economy, the Canadian Food Inspection Agency (CFIA) has an objective to maximize the impact of its communications to Canadian businesses and the general public about issues, best practices and regulations related to plant health. Their high-level communications objectives for the plant health business line include:

1. **Increase awareness about why** it is important to foster plant health
2. **Drive action** through action-oriented communications
3. **Gain and maintain public trust** in the CFIA by highlighting its role in protecting Canada's resources
4. **Collaborate with Industry**

To monitor its progress in meeting these objectives, the CFIA contracted Environics Research to conduct research with the Canadian public and regulated plant businesses to understand perceptions of and trust in the CFIA; consumer and industry understanding of various plant health issues including invasive species; and the information needs and concerns of industry professionals and consumers about regulations, service delivery and operations.

Methodology

This research study consisted of three parts:

1. **Industry survey.** The industry survey consisted of a 10-minute telephone survey with 300 representatives of plant health businesses regulated by the CFIA. Relevant businesses were identified by NAICS codes, and the sample was sourced from business lists. The survey was in field from February 15 to 29, 2024.
2. **Qualitative IDIs with representatives of Canadian potato businesses.** The qualitative portion of this research project consisted of N=20 individual depth interviews conducted with potato growers and processors identified from publicly available lists. Interviews were conducted from February 12 to March 26, 2024.
3. **Public survey.** An online survey of Canadians was conducted with a representative sample of 1,026 Canadian adults (18+) drawn from an online panel. Quotas for age, gender and region and the final sample was weighted to ensure it reflects the distribution of the Canadian population. The survey was in field from March 11 to 20, 2024.

More detailed methodologies for each phase can be found in Appendix A, B and C of this report.

Statement of limitations: Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as measured in a quantitative survey. The results of the qualitative research should be viewed as indicative rather than projectable to the population.

Since online panel surveys are not random probability samples, no formal estimates of sampling error can be calculated for the public survey. Although not employing a random probability sample, online surveys can be used for general population surveys provided they are well designed and employ a large, well-maintained panel.

The telephone survey of businesses used a list of ~10,000 records of qualified businesses, drawn randomly from a total of ~17,000 available records. Companies from the list were dialled at random to reach the final sample of 300 completed surveys. The margin of error for this sample is +/- 6 percent, nineteen times out of twenty.

Contract value

The contract value was \$126,390.50 (including HST).

Key findings

Key findings – Business Survey

- **Regulated plant businesses are attentive to plant health issues.** Addressing plant health risks is a high priority for a majority (59%) of these businesses. They regularly seek information about plant health risks (65% at least monthly), most commonly through the Internet but also from trusted advisors in their network, such as colleagues, industry associations, agronomists, seed companies and pesticide suppliers, which is consistent with the learnings of the qualitative interviews.
- **Six in ten plant health businesses say their federal regulatory responsibilities are very or somewhat clear.** Seven in ten are comfortable (very or somewhat) managing the federal plant health regulatory responsibilities related to their business.
- **Plant health businesses have moderate familiarity with and trust in the CFIA.** A majority say they are familiar with the CFIA (56%), and those with at least minimal familiarity generally trust the CFIA to do what is right (62%).
- **About half of businesses recall receiving information from the CFIA in the past year, mostly by email.** The majority of this group are satisfied (17%) to neutral (36%) with the CFIA's communications overall and say the frequency is about right (65%). They are also generally positive about the clarity (77%) and helpfulness (81%) of the information, although in both cases, few are fully satisfied which leaves room for improvement.
- **Looking ahead, email is also by far the most preferred channel for future communications by the CFIA** (64%), with mail as a secondary channel (25%). Very few mention wanting to receive CFIA information by social media or the My CFIA portal (1% each). There is limited awareness (24%) and use (14%) of the My CFIA portal to date. There are varying levels of digital readiness among businesses, with just over four in ten who say they are ready for the CFIA to move to a digital or electronic reporting and inspection system, and another one in three in process of becoming ready.
- **Overall, larger businesses tend to express greater confidence than smaller companies with navigating the system.** Larger businesses (more than 50 employees) report a clearer understanding of their federal regulatory responsibilities and a greater degree of comfort managing those responsibilities, a greater familiarity with the CFIA, greater recall of receiving recent communications, greater use of My CFIA portal, and better digital readiness.

Key findings – Qualitative Interviews with Potato Businesses

The objective of the one-on-one interviews with potato growers was to more deeply explore the topics covered in the quantitative survey.

- **The interview results revealed differing perspectives of the potato wart situation based on proximity and impact. PEI producers who have been directly impacted by the border closure were very critical of the CFIA’s initial potato wart decision** and the immediate, damaging and far-reaching consequences. As a result, PEI producers report a complete loss of trust in the CFIA’s decision-making process. There was a sense that the CFIA has made efforts to improve its communications and relations with producers over the previous six months, but producers reserved judgement on whether such efforts are sufficient.
- **Producers outside PEI (in Alberta, Manitoba, Ontario and Quebec) have not paid the same degree of attention to potato wart** but the general consensus was that CFIA handled the situation appropriately, because potato wart has not spread beyond PEI. Producers acknowledged how challenging this situation is for PEI, in some cases drawing on their experience with the PCN virus that affected the Alberta industry in the late 2000s. Without this source of tension, producers outside PEI were reasonably satisfied with current relations with the CFIA. Concerns typically centered around the need to find efficiencies and increase automation to reduce bureaucracy and paperwork.
- **Potato growers in all provinces rely on a trusted network of sources for information about plant health**, which includes their provincial associations and experts such as agronomists, seed and pesticide suppliers and other producers. The CFIA website is not a go-to source for this information. However, producers in all provinces reported good relations with the inspectors and local CFIA contacts they felt they can go to with questions. They do, however, note some concerns about declining staff capacity within the CFIA.
- **Overall, producers outside PEI are not seeking major changes to how the CFIA communicates with them. Within PEI, producers’ focus of change is with high-level decision-makers rather than regular communications.** Key ways in which producers feel the CFIA can encourage greater dialogue with growers include: being present; being authentic with requests for input and demonstrating how the input has been taken into consideration; and, more effectively championing Canadian industry with our trade partners.

Key findings – Survey of Canadians

- **Canadians are not engaged with plant health issues: they have limited awareness of major invasive species and few actively seek out plant health information.** Of a list of nine invasive species, Canadians are most aware of Japanese Beetle (29%), the Emerald Ash Borer (25%), and the Asian Longhorn Beetle (21%); 12 percent have heard of potato wart; fewer than one in ten have heard of any other invasive species, or of per and poly-fluoroalkyl substances (7%) or the One Health Approach (3%). Fewer than two in ten Canadians regularly seek out plant health information (i.e., more often than once a year), and just one in four consider themselves familiar with what causes or prevents the spread of invasive species.
- **There is low awareness of and familiarity with the CFIA.** Just five percent could name the CFIA as an organization dedicated to safeguarding and protecting plant health; 16 percent say they are familiar with the CFIA’s activities; and 15 percent recall recent news about the CFIA.
- **Canadians express trust in the CFIA.** Two thirds of Canadians with at least some familiarity with the CFIA agree that it issues believable statements (65%) and that it looks out for the best interests of Canadians (64%). Those most familiar with the CFIA most frequently chose the words “scientific” (50%) and

“informative” (48%) to describe the CFIA (from a list provided). Thus, despite low public familiarity with its mandate, the CFIA appears to benefit from Canadians’ overall trust in government.

- **Of the many CFIA’s interest groups in plant health, farmers and gardeners emerge as a segment most informed about and engaged with plant health issues.** Farmers/gardeners¹ are among the most aware of several invasive species including the Japanese Beetle (47%), the Emerald Ash Borer (39%), the Asian Longhorn Beetle (33%) and have greater familiarity with the activities that can cause or prevent the spread of invasive species (38%). Campers/cottagers/hikers/outdoor enthusiasts and biology/ecology/nature enthusiasts are other groups who emerge as having relatively higher awareness of many plant health issues.
- **Potato wart is a primary issue of concern for the CFIA, but few Canadians (12%) are aware of it and this group has limited understanding that its management is a responsibility of the federal government (57%).**
- **To effectively reach Canadians, the CFIA should continue using a variety of online and traditional media channels.** Canadians who actively seek plant health information favour the Internet and Google search as their sources; only one in ten turn to social media – most commonly Facebook and Instagram. However, those who have heard recent news about the CFIA most commonly recall getting their information from traditional media like newspaper, TV and radio (57%), followed by websites (33%) and social media (26%) – again, with Facebook and Instagram best recalled.

Political neutrality statement and contact information

I hereby certify as senior officer of Environics that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada, 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.

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¹ CFIA special interest groups were grouped by theme at the tabulation stage to allow sufficient sample size for analysis.

