Agriculture and Agri-Food Canada
Agriculture et Agroalimentaire Canada

2021-2022 Strategic Issues Survey with Producers (Wave VII)

Executive Summary

Prepared for Agriculture and Agri-Food Canada

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For more information on this report, please contact Agriculture and Agri-Food Canada at aafc.info.aac@agr.gc.ca..

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Canada

2021-2022 Strategic Issues Survey with Producers (Wave VII)

Quantitative Survey Results Final Report

Prepared for Agriculture and Agri-Food Canada

Supplier name: Leger Marketing Inc.

Date: March 21, 2022

This public opinion research report presents the results of an online survey conducted by Léger Marketing Inc. on behalf of Agriculture and Agri-food Canada. The quantitative research study was conducted between January and March 2021.

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Executive summary

Leger Marketing Inc. (Leger) is pleased to present this report to Agriculture and Agri-food Canada (AAFC) on the findings from the seventh wave of the Strategic Issues Survey with Producers, designed to learn about Canadian farmers and the challenges they face.

Background and objectives

AAFC has been conducting the Strategic Issues Survey, a survey of producers, since 2007. The research is designed to provide insight into the views of producers on current agricultural issues in Canada and on priorities and policies that affect the agriculture and agri-food sector.

The survey builds on tracking questions from previous waves to note trends over time but also provides insights on new and evolving areas of interest to AAFC. This wave of research includes a focus on sustainability, along with other upcoming priorities. This year's research also continues to track benchmarks of the department's multi-year agricultural policy framework, the Canadian Agricultural Partnership. The contract value for this project was $99,471.08 including HST.

Specific objectives of the research include, but are not limited to, providing AAFC with up-to-date data on:

- views on the sector including jobs and growth
- agricultural programming and the roles of governments and the agricultural industries
- perceptions of public trust in the sector
- sustainability
- innovation

Intended use of the research

The findings of the research will be used in the development of policies, programs and initiatives, to improve communications and to better serve clients. The results are used to gain critical insights on the opinions, issues and challenges facing agricultural producers in Canada.

Methodology

This public opinion research was conducted via telephone survey, using Computer Aided Telephone Interviewing (CATI) technology. Fieldwork for the survey was carried out from January 18 to March 3, 2022. A total of 1,447 Canadian producers aged 18 or older were surveyed. To be eligible, respondents had to be at least 18 years old, live in Canada, be at least a joint decision-maker of their farming operation and have more than $10,000 in farm sales in 2021. The average length of interview was 27 minutes and 42 seconds. Contacting was done through a phone list including individuals working in the agriculture industry. The overall response rate for the survey was 38%. Considering a total population size of 373,940 agricultural producers in Canada, the margin of error for a 1,447 producers' sample is ±2.6%, 19 times out of 20.

Weighting was done following the same structure as previous waves, by revenue and region to help readjust the sample for minor imbalances. However, some subgroups still has insufficient sizes to draw any significant observations.

Leger adheres to the most stringent guidelines for quantitative research. The survey instrument was compliant with the Standards of Conduct of Government of Canada Public Opinion Research.

Overview of the findings

Sample overview

Around half (47%) of producers that were surveyed generated incomes lower than $100,000, and a third (34%) generated over $250,000, similar to the 2018 study. A third of farms are oilseed and grain farming operations (32%), and another one in four are cattle ranching and farming operations (24%). Compared to 2018, this wave of the study includes slightly fewer dairy cattle and milk production operations (9% versus 11%) and poultry farming operations (2% versus 4%), and more vegetable farming operations (8% versus 5%).

General challenges and practices

While over a third (36%) of producers were optimistic about the future of their farm operation saying they expect to be a little better (27%) or much better off (9%) in five years, more than one in four (28%) feel they will be a little worse (17%) or much worse (11%) off. Close to a third (30%) do not expect any changes (positive or negative) to their operation in the next five years, similar to the 2018 wave.

The most important issues facing Canadian agriculture over the next five years is production/input costs (28%, up significantly from 13% in 2018) followed by climate change impacts, including extreme weather and natural disasters (21%, up from 11% in 2018).

However, climate change impacts are still the main business risk producers are facing (52%), consistent with previous waves. A significantly greater proportion of producers are also facing increased production and input costs (up 7% from 2018) this year.

Around a third (35%) of agricultural producers declared having an emergency plan put in place, but almost all of them have implemented one or more measures to mitigate the risks their farm might face in the future. Financial planning (72%) and environment and/or sustainable measures (71%) were at the top of the list with more than seven farms out of ten putting these measures in place. In comparison with 2018, a higher proportion of producers have implemented biosecurity measures (40% versus 36%), stockpiled supplies (54% versus 43%), emergency kits (59% versus 49%) and environment and/or sustainability measures (71% versus 62%).

Diversification of farm products to face economic uncertainties was considered important by nine out of ten (87%) agricultural producers but only one in two producers (53%) said they did diversify their markets as a way to manage emergency risks.

While technology might provide some solutions regarding the various challenges farmers have to face, its adoption is mitigated by various barriers. Cost was rated as the largest barrier (73% rated it as an extreme or moderate barrier), along with level of risk for the return on investment (64%), lack of time to learn about (45%) and implement (48%) the innovations. The lack of access to high speed internet/cellular service was a barrier for 38% of producers. Although, almost a quarter (22%) of producers responded internet accessibility was an extreme barrier. This extreme barrier result ranked third just behind cost (44%) and the level of risk for the return on investment (26%). To counter these, farmers want financial assistance (64%), and general training on technologies to be able to see their benefits in action (opportunity to see technology in action: 59%, technical advice: 55%, more information: 52%).

Public trust

Virtually all producers (99%) have implemented at least one trust-building measure on their farm. Environment stewardship programs (67%) and nutrient management plans (67%), along with reduced pesticide use (66%) were the most common measures put in place.

Public perceptions play a strong role in how producers make decisions about their farm operations, as they might impact demand levels: six out of ten (59%) producers considered that public perceptions play a moderate to very strong role in their decision making, while only one in ten (14%) said they have no impact at all. The proportion of producers who considered public perceptions to have an impact on their farm operation is lower in 2022 compared to 2018 (59% vs 66%).

Environmental initiatives (93%), along with food safety (92%), were deemed the two most important elements that play a part in building and maintaining the public's trust in the agricultural sector. To that effect, around half (47%) of producers had a formally written environmental farm plan. Producers from Quebec and the Atlantic region seemed significantly more aware of environmental challenges and initiatives, as they were more likely to consider environmental management important to build and maintain the public’s trust than their counterparts from other provinces (96% and 98% respectively, versus 92% overall).

Environment and sustainability

Producers considered that their agricultural activities have a positive impact on the environment (69%) rather than a negative one (15%), and almost three out of four of them (73%) felt that agricultural producers take the appropriate actions to minimize the impact of their operations on the environment.

Furthermore, half (50%) of them gave sustainability initiatives a high priority while only one in ten (9%) producers gave them a low priority.

Although not all farms have an environmental plan in place (around half of them, 47%, do), most have implemented at least one environmental measure, if not more (98%). Reduced pesticide use (74%), crop rotations (74%), and water quality and quantity improvements (67%) were the most popular measures put in place by agricultural producers.

Overall, one producer out of ten (9%) is organic certified, but this proportion almost tripled when it came to poultry (20%), vegetable (24%), and fruit farming operations (21%).

Labour market challenges

Around a third (35%) of producers were facing labour market challenges in 2022. The pandemic along with the massive quitting of workers that ensued (The Great Resignation) might have exacerbated labour market challenges for farm producers as well. Recruiting staff was a problem for over eight out of ten (84%) producers who faced labour market challenges. Recruiting issues pertained mainly to hiring high skilled (39%) or low skilled (50%) workers. On farm experience (18%) and experience operating farming equipment and heavy machinery (16%) were two of the main skills that were hard to come across.

Relationship with AAFC and their programs

Around a third (34%) of farm operators were aware of the Canadian Agricultural Partnership. The proportion was higher among producers from Alberta (40%). Overall, the impressions of the Partnership were mostly positive (59% versus 15% negative). Both awareness and positive impressions have seen a significant increase since 2018 (up by 6% and 10% respectively), but this increase has not translated into familiarity with the Canadian Agriculture Partnership and AAFC programs offered: six in ten producers (59%) did not have top of mind (unaided awareness) of AAFC programs.

While familiarity may be low, producers still considered the Canadian Agricultural Partnership's investments important. According to them, the main priorities the Government of Canada should support were advancing agriculture science and research (92%) and promoting trade and increasing agricultural exports (87%). Supporting mental health initiatives (85%) and addressing environmental climate change (78%), as well as supporting diversity in the industry (72%) have gained importance to producers since 2018.

Focus on young and female producers

Younger producers (who are aged 18 to 34 years old) and female producers were more optimistic towards the future of their farm operation (53% and 42% versus 36% overall). Being more concerned about environmental challenges, they highly prioritized sustainability (18-34: 59%, women: 57% versus 50% overall). This heightened attention to sustainability also explains why they were more likely to think agricultural activities have a positive impact on the environment (79% and 73% respectively versus 69% overall).

Young producers were more likely to have implemented an emergency management plan (46% versus 34% among older producers), report needing financial assistance (77% versus 59% among 55+) to overcome barriers to technological innovation and were more likely to have faced labour market challenges (57% versus 35% overall).

Female producers were more likely to think environmental management (96% versus 91%), animal welfare (92% versus 83%), food safety (96% versus 91%), and labour practices (88% versus 82%) are important to build and maintain the public's trust. Female producers have more barriers to adopting new technologies than men. Female producers also faced more barriers to adopting new technologies than men.

Notes on interpretation of the research findings

The views and observations expressed in this document do not reflect those of AAFC. This report was compiled by Leger based on the research conducted specifically for this project.

Respondents for this survey were selected from a list of individuals working in the agricultural industry. Since the telephone list the sample was drawn from is exhaustive, results can be statistically projectable to the target population (Canadian producers). The data have been weighted to reflect the demographic composition of the target population.

Political neutrality statement and contact information

Research Firm:

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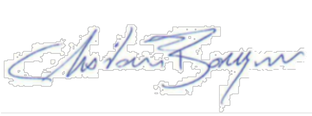
Leger Marketing Inc. hereby certifies that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed: 

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