



Agriculture and
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2023-24 Strategic Issues Survey with Producers (Wave VIII)

Executive Summary

Prepared for Agriculture and Agri-Food Canada

Supplier name: Pollara Strategic Insights Inc.

Contract number: CW2332519

Contract value: \$144,459.93

Award date: September 28, 2023

Delivery date: March 27, 2024

POR Registration Number: 055-23

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

Ce rapport est aussi disponible en français.

Canada 

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This public opinion research report presents the results of a telephone survey with 1,351 agricultural producers conducted by Pollara Strategic Insights Inc. on behalf of Agriculture and Agri-Food Canada. The research was conducted from January to February 2024.

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Agriculture and Agri-Food Canada

1341 Baseline Road

Ottawa, ON K1A 0C5

Catalogue Number: A22-623/2024E-PDF

International Standard Book Number (ISBN): 978-0-660-70277-3

Agriculture and Agri-Food Canada Number: 13191E

Related publications registration number: POR 055-23

Cette publication est aussi disponible en français sous le titre : Sondage 2023-2024 sur les enjeux stratégiques des producteurs (vague VIII).

Catalogue number: A22-623/2024F-PDF (Final report, French)

ISBN: 978-0-660-70278-0

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Executive Summary

A. Research background and objectives

Agriculture and Agri-Food Canada (AAFC) has been regularly conducting the Strategic Issues Survey with Producers in Canada since 2007. The research is designed to provide insights into the views of producers on current agricultural issues in Canada and on the priorities and policies that affect the agriculture and agri-food sector.

This survey, the eighth wave of tracking, builds on previous waves to show trends over time, and also provides insights on new and evolving areas of interest to AAFC. This year's research continues to focus on challenges faced by the agriculture industry in Canada, measures taken to ensure and maintain sustainability in farm operations, and programs offered to agricultural producers. In addition, this year's research studies emerging priorities like food loss, cyber security and mental health, and assesses new initiatives and programs introduced by AAFC.

This research will be used in the development of policies, programs and initiatives, and will inform communications planning, outreach, and engagement with agricultural producers across Canada.

B. Brief methodology

Pollara conducted telephone surveys, using Computer-Aided Telephone Interviewing (CATI) technology, with 1,351 agricultural producers across Canada. 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 2023. The survey was conducted between January 14, 2024, and February 26, 2024, in English and French.

The sample was obtained from Dunn & Bradstreet of agriculture producers. Considering the total population of agricultural producers in Canada, a probability based sample of 1,351 producers would have a margin of error of $\pm 2.7\%$, 19 times out of 20. The margin of error is larger for subpopulations, and it should be noted that some subgroups have insufficient sample sizes to draw significant observations.

The dataset was weighted by province and farm revenue to ensure the data was representative.

A complete methodological description is provided in Appendix A and the questionnaire is presented in Appendix B.

C. Summary of key findings

Risks and challenges faced by farms in Canada

Consistent with findings from previous years, the main business risks producers in Canada face are largely associated with the impacts of climate change and extreme weather conditions (52%), followed by increases in operational expenses (32%) that are compounded by market volatility and fluctuations (24%). Half of producers (51%) experienced drought and one in four (26%) experienced flooding over the past two years. One in four (27%) British Columbia producers experienced wildfires over this period.

While these issues are prevalent across all provinces, extreme weather events are proving to be a larger business risk to farm operations in Quebec (61%), Alberta (61%), Atlantic Canada (57%), and Manitoba (56%), while cost-based challenges are more likely to be reported in Alberta (38%), Saskatchewan (35%), and British Columbia (34%).

Given the risks that producers are already being exposed to, it is understandable that operational costs (26%) and climate change (19%) are the top issues they feel Canadian agriculture is most likely to face over the next five years.

Though labour shortages are not mentioned often as a top-of-mind business risk (5%), this has been a consistent secondary issue over the years (8% in 2022; 5% in 2018). In 2024, 38% of producers across Canada report experiencing labour market challenges and facing difficulties primarily in recruiting both high-skilled (48%) as well as low-skilled (49%) labour. Labour shortages are a more acute concern among larger farms (56% among farms with revenue of \$500K or more), and in Atlantic Canada (62%) British Columbia (50%), Ontario (47%), and to some extent in Quebec (35%) and Alberta (35%). One third (33%) of farms facing labour challenges opted to hire temporary foreign workers (TFWs) as a way to overcome the labour challenge. Most of those who chose not to hire TFWs (67%) found other labour solutions (51%), but confusion over the application process (15%) and difficulty to arrange TFW accommodations (12%) are also barriers to using this program.

This year, new questions on cybersecurity were added, including questions on concern, preparedness, and incidence. Very few farms (9%) have ever experienced a cyber security incident that has disrupted their farming operations. That said, producers express a moderate concern (40%) over being victims of cyberattacks. To this end, only one third (34%) say they are at least somewhat prepared to handle such an incident.

Farm operational practices and risk management

Considering climate change and extreme weather events, production cost, and farm viability challenges impacting Canadian farms, producers are acutely aware of the need to prioritize environmental and sustainability practices on their farms. Most producers consider this a priority and have implemented multiple programs, practices, and measures to this end. The most common

actions taken include environmental/sustainability measures (57%), back-up power generation (54%), traceability systems (46%), biosecurity measures (42%), animal welfare measures (40%), and developing an emergency plan (39%).

Half (49%) of producers say that public perceptions about agriculture and food production at least moderately impact the way they operate their farm and the decisions they make. The public influence on operational decision-making has been steadily declining over time; two thirds (67%) in 2018 and six in ten (59%) in 2022 reported being at least moderately impacted by this.

Producers also turn to friends and contacts (78%), agrologists (67%), equipment or supply vendors (59%), industry associates (57%) and other advisors to get advice when making decisions regarding practices to implement on their farms. Social media (41%) and podcasts (26%) also appear as notable sources of information, evenly accessed by producers of all ages.

Agriculture and Agri-Food Canada (AAFC) initiatives

Most producers are aware of at least one AAFC program or initiative, with a large majority saying they have seen, heard, or read about AgriStability (78%) and AgriInvest (74%), and a slim majority saying they are aware of AgriInsurance (56%) and the Advance Payment Program (51%). The other AAFC programs and initiatives tested are lesser known.

Not surprisingly, the programs and initiatives that are more well-known are also the ones that are most applied to for funding or support. To this end, awareness of AAFC programs is lower in British Columbia than elsewhere in the country, as is uptake of them.

AgriInvest (71%) and AgriStability (67%) are most often applied to, more so by farms with incomes of \$500K or more (81% and 69% respectively), and farms in Saskatchewan (85% and 67% respectively), Quebec (76% and 84% respectively), and Alberta (70% and 69% respectively). Primary reason for not applying to AgriStability is because it is not needed (32%). Very few say that it is not beneficial (11%) or is complicated to apply to (9%). Thus, improving awareness of these initiatives and programs among producers is likely to encourage more producers to take advantage of the programs.

About one third (32%) of producers are aware of the Sustainable Canadian Agriculture Partnership and almost similar proportions (38%) are also very or somewhat familiar with the details and services under this initiative. While general awareness is almost similar to levels seen in previous years (34% aware in 2022 and 28% in 2018), familiarity with details is much lower now (50% familiar in 2022 and 47% in 2018). Those aware of the initiative are likely to have a positive (47%) to neutral (34%) view of the program.

This year, awareness of mental health support services was tested. Over half (54%) of producers are aware of these supports and initiatives, however, only 1% report accessing these services.

Future expectations

Canadian producers have mixed views regarding their business' recent economic performance, as almost equal proportions say their net income has grown (37%), has remained the same (32%), or has decreased (29%) over the last five years. These sentiments are transferred to expectations regarding their farm's future – where a third (32%) believe their farm's future will be better off, a slightly lower proportion believe it will be worse off (28%), and the remainder (33%) believe there won't be any change. Though the economic outlook of Canadian producers has been growing slightly more pessimistic in recent years, given Canadians as a whole are feeling less secure about their economic future than a few years ago, it is notable that the economic outlook of agriculture producers has only worsened marginally (36% better off versus 28% worse off in 2022, and 35% better off versus 28% worse off in 2018).

Producers in Atlantic Canada (44% better off versus 20% worse off), Quebec (41% versus 24%), British Columbia (35% versus 19%) and Manitoba (33% versus 20%) are much more likely to believe their farm operations will be better off in the next five years than worse off. On the other hand, producers in Alberta (25% better off versus 29% worse off), Ontario (33% versus 34%) and Saskatchewan (29% versus 30%) are less likely to feel as optimistic; they are marginally more likely to expect to be worse off than better in the next five years.

Except for oilseed and grain producers who are more likely to believe they will be worse off (32%) than better off (25%), all other producers are more likely to expect their farm operations will improve rather than worsen over the course of the next few years. Notably, dairy, cattle and milk producers are most optimistic about their farm operations (44% better off versus 24% worse off).

D. Note to readers

Detailed findings are presented in the sections that follow. Overall results for the 2024 survey are presented in the main portion of the narrative and are typically supported by tabular presentation of results and labelled as “2024”. Results are compared, where applicable, with the 2022, 2018, 2017 and 2013 survey findings, and are presented in tables under the headings labelled as per the corresponding year. Where there are significant differences between the provinces, farms with varying incomes and different types of farms, these differences are described in the report as part of the main paragraph or as bulleted text.

Only statistically and substantively significant differences between sub-groups are noted. If differences are not noted in the report, it can be assumed they are either not statistically significant* in their variation from the overall or that the difference was deemed to be substantively too small to be noteworthy.

Results may not total to 100% due to rounding.

**Chi-square and standard t-tests were applied as applicable. Differences noted were significant at the 95 % level.*

E. Political neutrality certificate

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I hereby certify as a representative of Pollara Strategic Insights Inc. that the final 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.

Signed:

Date: March 27, 2024

A handwritten signature in black ink that reads "D. Arnold". The signature is written in a cursive, slightly slanted style.

Dan Arnold, Chief Strategy Officer
Pollara Strategic Insights