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

Final Report

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.

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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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 ±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). The 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

Dan Arnold, Chief Strategy Officer
Pollara Strategic Insights

Detailed findings

The detailed findings of this research project are divided into four sub-sections:

1. Risks and challenges faced by farms in Canada
2. Farm operational practices and risk management
3. Agriculture and Agri-Food Canada (AAFC) initiatives
4. Future expectations

This is followed by a section profiling different types of agricultural producers.

1. Risks and challenges faced by farms in Canada

Business and emergency risks

Half (52%) of Canadian producers say that the impacts of climate change, including natural disasters and extreme weather fluctuations, are the main business risk they face. This challenge has been at the forefront since 2013.

Climate change and extreme weather conditions are causing significant business risks to farm operations in Quebec (61%), Alberta (61%), Atlantic Canada (57%), and Manitoba (56%) and somewhat lower but notable risks to farms in Saskatchewan (48%), British Columbia (47%) and Ontario (41%). Produce farms (59%) and oilseed/grain farms (56%) are the most likely to feel climate change poses a business risk to them.

The perceived risk of climate change is understandable given that half (51%) of producers have experienced drought and one quarter (26%) have experienced flooding over the past two years. Less than one in ten (7%) farms have been affected by wildfires over the past two years, despite the growth in wildfires in recent years.

One third (32%) say they are experiencing increases in operational, production and input costs, one quarter (24%) are facing market price fluctuations, and 15% believe the profitability and viability of the farming sector poses a risk to their operations. Additionally, cost-based risks are slightly more likely to be mentioned as pertinent risks by farms with higher income ($500K and over) compared to mid to lower-income farms (under $500K). The converse is true for climate change related risks.

The risks and challenges associated with climate change and operational expenses have been prevalent as top factors since 2013 – in particular, challenges such as increased production and input costs and market fluctuations. It is noteworthy that the likelihood of farms being impacted by diseases and pests has been decreasing over time from 24% in 2013 to 13% in 2024.

Few producers say that changes in government policies (8%) and taxes (6%) pose as a challenge to their farming operations, consistent with the previous wave (6% and 4% respectively).

Table 1 – Q7. What type of business risks does your farming operation face? Base: Total (n=1,351)

	2024	2022	2018	2017	2013
Climate change impacts/ Natural disasters and extreme weather fluctuations	52%	52%	47%	48%	52%
Increased operational/production/input costs	32%	35%	23%	27%	34%
Market price fluctuations/volatility	24%	20%	36%	34%	29%
Profitability/ Viability of Farming Sector/ Making a Living/ Returns Covering Costs	15%	5%	2%	-	-
Diseases or pests	13%	12%	15%	20%	24%
Interest rates	9%	4%	3%	-	-

Changing government policies and programs	8%	6%	10%	9%	5%
Trade barriers/ Barriers to market access	6%	6%	15%	11%	1%
Taxes/ Carbon Tax	6%	4%	1%	-	-
Labour issues	5%	-	-	-	-
Marketing	3%	-	-	-	-
Responses in the 2024 wave that are less than 3% are not shown.					

As mentioned, a significant proportion of producers experienced climate change related emergencies in the past two years: farms in Alberta (78%), Manitoba (76%), Saskatchewan (69%) and British Columbia (57%) report experiencing drought; farms in Atlantic Canada (64%) and Quebec (52%) report experiencing flooding or increases precipitation; 68% of farms in Atlantic Canada experienced hurricanes; and 27% of farms in British Columbia experienced wildfires.

Table 2 – Q8. Which of the following emergencies has your farming operation experienced in the last two years? Base: Total (n=1,351)

	Total	ATL	QC	ON	MB	SK	AB	BC
Drought	51%	33%	6%	36%	76%	69%	78%	57%
Flood/Excess precipitation	26%	64%	52%	32%	27%	6%	13%	16%
Plant disease	19%	26%	18%	23%	28%	20%	10%	22%
Animal disease	12%	2%	11%	14%	17%	14%	9%	10%
Wildfire	7%	7%	2%	4%	1%	5%	9%	27%
Cybersecurity attack	4%	4%	1%	7%	2%	3%	3%	8%
Hurricane	3%	68%	2%	2%	1%	1%	1%	-
Don't know/Prefer not to say	24%	12%	35%	31%	8%	21%	16%	26%

Labour market challenges

Nearly four in ten (38%) farms have experienced labour market challenges in the past two years, slightly up by 3 points from 2022. Farms with an income of $1 million or more are significantly more likely to report this as a challenge (61%), consistent with past findings.

- Challenges faced due to the labour market are also a larger issue for produce farms (57%), dairy and milk production farms (49%), and animal and livestock farms (46%).

Table 3 – Q40. In the past 2 years, have you experienced any labour market challenges? (For example, recruiting staff or training.) Base: Total n=1351

	Total	Farm Income (Under $100k)	Farm Income ($100k to $500k)	Farm Income ($500k to $1 million)	Farm Income ($1 million or more
Yes	38%	32%	34%	44%	61%
No	62%	68%	66%	56%	38%

Amidst ongoing labour market pressures in Canada, farms that are experiencing labour shortages are also primarily facing a recruiting challenge – that is, recruiting and attracting both low-skilled or low wage staff (49%) and high-skilled or high wage staff (48%). These challenges are consistent with 2022 findings; however, recruiting high skilled staff was less of a challenge in 2022 (50% for low-skilled/wage and 39% for high-skilled/wage).

- Recruitment of low-skilled labour is a notable challenge for British Columbia (64%), Atlantic Canada (58%) and Ontario (57%) based farms, whereas farms in Saskatchewan are not only finding it difficult to recruit low-skilled staff (50%) but also high-skilled staff (59%).

Table 4 – Q41. What labour market challenges have you faced? Base: Respondents who have experienced labour market challenges (n=617)

	2024	2022
Recruiting/attraction of low skilled/low wage staff	49%	50%
Recruiting/attraction of high skilled/high wage staff	48%	39%
Recruiting/attraction of staff (general)	23%	11%
Limited budget to provide competitive wages and benefits	12%	8%
Retaining existing staff	9%	10%
Limited ability to provide training for new or existing staff	4%	5%
Access to staff transportation to farm/operation	3%	2%
Access to staff housing	1%	2%
Other	5%	4%
Because respondents were able to give up to three answers, total mentions may exceed 100%.		

In the last year, only 17% of farms chose to hire any temporary foreign workers. However, this figure doubles (33%) among those farms who experienced a labour shortage. Numbers are also significantly higher among farms with an income over $1 million (45%).

- Labour shortages are more significant across farms in Atlantic Canada (62%), British Columbia (50%) and Ontario (47%). To this effect, producers in British Columbia (26%) and Ontario (23%) were more likely to employ temporary foreign workers. However, even though labour shortages are most common in Atlantic Canada, producers there are less likely than those in British Columbia or Ontario to employ temporary foreign workers (16%). Quebec producers are also more likely than those in Atlantic Canada to employ temporary foreign workers (22%), even though only 35% of Quebec farms face labour shortages.

Table 5 – Q42. In the last year, did you employ any temporary foreign workers? Base: Total (n=1,351)

	Total	ATL	QC	ON	MB	SK	AB	BC
Yes	17%	16%	22%	23%	11%	6%	13%	26%
No	83%	84%	78%	77%	89%	94%	87%	74%

Two thirds (67%) of producers who faced labour shortage challenges did not hire temporary foreign workers. The primary reason provided for not hiring was that they did not require additional workers or were able to find Canadian workers (51%). That said, 15% say they found the application process too confusing and 12% found it difficult to arrange for accommodation for the workers.

Cost and difficulty finding accommodations are cited more often in Atlantic Canada as reasons for not hiring temporary foreign workers, partly explaining why Atlantic Canadian producers facing labour shortages are less likely to hire TFWs.

Food production losses

As seen in the previous section, Canadian producers face many operational challenges due to climate change related events. Weather-related events are also the primary cause (80%) for food production losses that have occurred on fruit and vegetables (71%), oilseed and grain (88%), and dairy and milk production (76%) farms over the past two years. All other causes such as plant or animal disease (11%) and pest or wildlife issues (8%) trail far behind.

While extreme weather events were the main cause of food production losses across all provinces, farms in Atlantic Canada also faced losses due to labour shortages (18%) and wildlife (14%). In Ontario (22%) and among produce farms specifically (24%), plant or animal diseases were also a notable cause.

Table 6 – Q36. In the past two years, what were causes of food production losses (harvest-ready or harvested) that occurred on your farm? Base: All respondents except cattle ranchers, beekeepers, and poultry farmers (n=746)

	Total	ATL	QC	ON	MB	SK	AB	BC
Weather-related events damaged production	**80%**	93%	85%	66%	82%	84%	95%	70%
Plant or animal disease	**11%**	4%	10%	22%	9%	8%	3%	9%
Pests or wildlife issues	**8%**	14%	2%	9%	5%	17%	5%	10%
Inadequate labour capacity	**4%**	18%	2%	9%	1%	2%	2%	5%
Only top 4 reasons are shown.								

Cyber security incidents

About one in ten (9%) producers report ever falling victim to cyber incidents in the past. Farms with income of over $1 million (16%) are much more likely to report experiencing a cyber security.

Among those affected, incidents include viruses (19%), bank/credit card fraud (18%), hacking (17%), email scams (17%), and identity theft (12%).

Table 7 – Q13. Has your farming operation ever been a victim of a cyber incident? Base: Total (n=1,351)

	Total	Farm Income (Under $100k)	Farm Income ($100k to $500k)	Farm Income ($500k to $1 million)	Farm Income ($1 million or more)
Yes	9%	5%	10%	7%	16%
No	90%	94%	88%	93%	84%
Don't know/Prefer not to say	1%	1%	2%	1%	0%

Although a very small number of farms have experienced cyber security incidents, a moderate proportion of producers (40%) say they are very to somewhat concerned about a cyber incident disrupting their farming operations.

- Farms with revenues of $1 million or more are significantly more likely to be concerned (55%), not surprising given they are more likely to have been victims of such an event. Though fewer farms with $500K to 1 million in revenue have faced cyber incidents (7%), they too are concerned (47%).
- Concerns are also markedly higher among older producers, 55 years and over (44%) than among those 45-54 year olds (33%) or younger than 45 years (30%).

Table 8 – Q11. How concerned are you that a cyber incident could cause disruptions to your farming operation? Base: Total (n=1,351)

	Total	Farm Income (Under $100k)	Farm Income ($100k to $500k)	Farm Income ($500k to $1 million)	Farm Income ($1 million or more)
Concerned (Very/Somewhat)	**40%**	**36%**	**38%**	**47%**	**55%**
Not Concerned (Slightly/Not at all)	**59%**	**64%**	**61%**	**51%**	**45%**
Very concerned	13%	13%	11%	11%	19%
Somewhat concerned	27%	23%	27%	36%	36%
Slightly concerned	31%	28%	34%	32%	31%
Not at all concerned	28%	36%	27%	20%	15%
Don't know/Prefer not to say	1%	0%	1%	1%	0%

Although four in ten (40%) producers are concerned about cyber incidents, only one third (34%) say they are at least somewhat prepared to handle a cyber incident.

- Of note, dairy and milk production farms (41%) and cattle ranching farms (43%) are likely to feel concerned about cyber security incidences, however, they are among the least prepared (77% and 66% respectively saying they are slightly prepared or not at all prepared).

Table 9 – Q12. How prepared is your farming operation to face a cyber incident? Base: Total (n=1,351)

	Total	Farm Income (Under $100k)	Farm Income ($100k to $500k)	Farm Income ($500k to $1 million)	Farm Income ($1 million or more
Prepared (Very/Somewhat)	**34%**	**31%**	**35%**	**35%**	**39%**
Not Prepared (Slightly/Not at all)	**62%**	**65%**	**61%**	**62%**	**59%**
Very prepared	10%	10%	8%	9%	11%
Somewhat prepared	24%	21%	27%	26%	28%
Slightly prepared	27%	24%	27%	34%	33%
Not at all prepared	35%	40%	34%	28%	27%
Don't know/Prefer not to say	4%	4%	4%	3%	2%

Challenges Canadian agriculture is likely to face in the next five years

Given the types of risks faced by producers recently – namely climate change impacts and increases in operational costs – it is not surprising that production costs (26%) and climate change, extreme weather, or natural disaster impacts (19%) are identified as the most important issues Canadian agriculture is likely to face in the next five years. These results are nearly consistent with 2022 results (28% and 21% respectively), while both of these issues are much more prominent now than in 2018 (13% and 11% respectively).

- Climate change related impact and operational expenses are almost equally identified as a pressing concern by producers in Quebec (29% and 27% respectively), Saskatchewan (25% and 27% respectively), and British Columbia (23% and 22% respectively).
- Production and input costs are considered to be larger challenges than climate change by producers in Atlantic Canada (30% costs versus 15% climate change challenges) and Ontario (27% versus 10%), whereas producers in Alberta (26% costs versus 20% climate change challenges) and Manitoba (17% versus 12%) expect production costs to be only somewhat of a bigger challenge than climate change.

Compared to how they felt about these issues in 2022, producers are somewhat more likely to feel that government intervention (10%, up 5%) and profitability or viability of the farming sector (9%, up 5%) are going to be challenges in the next five years. Conversely, commodity prices (6%) and international trade barriers (3%) which were considered as bigger challenges in 2018 (11% and 16% respectively), are now much less likely to be considered pertinent issues for the future.

Labour shortage concerns remain almost consistent with previous years (7% in 2024 versus 8% in 2022 and 5% in 2018). Labour shortage is more of a continued challenge for producers in Atlantic Canada (17%), Ontario (12%), and British Columbia (12%).

Table 10 – Q5. Looking ahead, what do think will be the single most important issue facing Canadian agriculture over the next 5 years? Base: Total (n=1,351)

	2024	2022	2018
Production costs/ Input costs	26%	28%	13%
Climate change impacts/ Natural disasters and extreme weather fluctuations	19%	21%	11%
Government intervention	10%	5%	-
Profitability/ Viability of farming sector/ Making a living/ Returns covering costs	9%	4%	5%
Labour shortages/ Availability/ Labour (general)	7%	8%	5%
Commodity prices/variable prices	6%	4%	11%
Carbon tax	5%	3%	3%
Environmental concerns	5%	-	-
Trade/ International trade barriers	3%	3%	16%
Responses in the 2024 wave that are less than 3% are not shown.			

2. Farm operational practices and risk management

Farm operation measures, programs and practices implemented

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. Over eight in ten (85%) feel this is at least a medium priority, with over four in ten (43%) considering it a high priority.

- Producers in Atlantic Canada and British Columbia report a higher emphasis on this matter, with 71% and 60% respectively considering it a high priority, surpassing other regions.
- Notably, close to six in ten (58%) produce farm producers place a high priority on this matter, compared to between 39% to 43% of producers across other farm types.

Table 11 – Q39. How much of a priority is it for you to implement environmental practices on your farm? Base: Total (n=1,351)

	2024	*2022
High Priority	43%	50%
Medium Priority	42%	41%
Low Priority	14%	9%
Don't know/Prefer not to say	1%	-
*This question was asked differently in 2022: How much of a priority is it for you to implement environmental sustainability initiatives? Due to the change in question wording, results cannot to be directly compared, however, as the context is similar, tracking data is shown for 2022.		

Additionally, most producers report implementing multiple environmental and sustainability measures – the most common being crop rotations (74%). Two thirds of producers say they have reduced pesticide use (64%), have practices in place to improve soil health like a nutrient management plan (63%), are improving carbon storage (63%), and have zero or low-till systems (62%). These are common practices that have been implemented on farms in previous years as well.

Indeed, producers that consider implementing environmental and sustainable practices on their farms as a high priority are more likely to have also implemented multiple programs and practices on their farms. Likewise, farms with higher revenue are more likely to implement these measures and practices; the likelihood of implementing these programs and practices reduces with a decrease in farm revenue.

Table 12 – Q15-Q28. Which of the following measures, programs or practices, if any, have you implemented? Base: Total (n=1,351)

	2024	2022	2018	2017
Crop rotations*	74%	74%	-	-
Reduced pesticide use	64%	66%	70%	67%
Nutrient management plan	63%	67%	66%	60%
Improving carbon storage in healthy soils*	63%	63%	-	-
Zero/low till systems*	62%	63%	-	-
Environmental stewardship programs	59%	67%	71%	63%
Beneficial manure handling	56%	54%	60%	52%
Improving biodiversity*	54%	62%	-	-
Reduced fertilizer use	53%	62%	-	-
Actions to reduce food loss on farm	51%	44%	-	-
Planting cover crops*	50%	60%	-	-
Irrigation or water conservation plan / improving water quality	48%	41%	43%	34%
Measures or practices to reduce/eliminate the use of drugs or antibiotics on farm animals	43%	48%	55%	47%
Reducing methane emissions*	24%	25%	-	-
*These items were asked as a separate question in 2022: Which of the following environmental sustainability measures, programs or practices have you implemented on your farm, if any? Results cannot be directly compared because it was asked as a different question. However, as the items are the same and were asked in a similar context, tracking data is shown for 2018 and 2022 where applicable.				

Just under six in ten producers have taken steps towards enhancing food safety measures (59%) and humane animal welfare practices (58%). Some also publicly talk about how their farm operates (46%) or participate in industry assurance programs (36%).

Table 13 – Q29-Q32. Which of the following measures, programs or practices, if any, have you implemented? Base: Total (n=1,351)

	2024	2022	2018	2017
Enhanced food safety measures	59%	60%	68%	59%
Humane animal welfare practices	58%	59%	67%	59%
Publicly talking about how your farm operates	46%	53%	60%	-
Participation in a sector/industry assurance program	36%	38%	37%	-

- Many producers across the different types of farms report implementing multiple measures on their farms. Some measures being used more by certain types of farms include:
    - Oilseed and grain farms are more likely to use crop rotations (91%) and zero/low till systems.
    - Produce farms are more likely to report decreasing pesticide use (75%), enhancing food safety measures (75%), implementing crop rotations (72%), and improving biodiversity (72%).
    - Dairy and milk production farms are most likely to report reducing or eliminating the use of drugs or antibiotics on the animals (84%), along with beneficial manure handling (92%) and humane animal welfare practices (95%).
    - Most cattle ranching farms (93%) and animal and livestock farms (81%) report humane animal welfare practises.
- In general, producers under 65 years of age are somewhat more likely to have implemented multiple different measures than those aged 65 and over – of note, the former group is more likely to reduce pesticide use (67% versus 61%), reduce fertilizer use (58% versus 48%) and instead implement nutrient management plans (67% versus 60%), improve biodiversity (61% versus 48%), plant cover crops (54% versus 47%), as well as implement environmental stewardship programs (62% versus 56%).

More than half (53%) of producers indicate they have reduced the use of fertilizers, and close to half (45%) say they refrain from using fertilizers altogether. Among those who do use fertilizer, half indicate that having the ability to align practices with 4R certifications (50%) and having access to services that can help decide which practices to implement (49%) would encourage them to implement measures that would help reduce the emissions from fertilizer use.

- Having access to services that can help them decide which practises to implement and the opportunity to align with 4R certifications are more important to higher income farms ($500K or more; 66% and 61% respectively), oilseed and grain (58% and 62% respectively), produce (49% and 54% respectively), cattle ranching (52% and 49% respectively), and dairy and milk production (55% and 60% respectively) farms.
- While access to services and aligning with 4R certifications are nearly equally important across the provinces, producers in Atlantic Canada are much more likely to need access to services to help them make a decision on which practices to implement (61%).

About one third of producers are concerned about cost implications and believe they would be more likely to reduce emissions from fertilize use if they received government funding (34%), clear return on investment (30%), and carbon offset credits in exchange for actions taken (27%).

- Government funding and receiving carbon offset credits are likely to be a stronger incentive for high-income farms ($1 million or more; 46% and 35% respectively) and oilseed and grain farms (40% and 38% respectively) to implement practices to reduce fertilizer-produced emissions.
- Animal and livestock farms (56%) and plant and tree farms (54%) are more likely to want to see a clear return on investment.

Table 14 – Q37. Which of the following would increase your use of agricultural practices that can help your farm reduce emissions arising from fertilizer use? Base: Total (n=1,351)

	Total	Farm Income (Under $500k)	Farm Income ($500k or more)
Ability to align practices with 4R certification opportunities	50%	47%	61%
Access to services to decide which practices to use and implement	49%	44%	66%
Government funding to help with the costs	34%	30%	46%
Clear return on investment	30%	33%	17%
Ability to get carbon offset credits in exchange for actions taken	27%	25%	35%
Not applicable – do not use fertilizer on farm	45%	41%	59%

Influence on farm operational decisions

Half (49%) of producers say that what the public thinks has at least a high-to-moderate impact on how they operate, though only 17% say it has a very high or high impact on them.

Compared to previous years, the likelihood of public perception impacting farm operational decisions is trending down. In the 2017 and 2018 waves of the survey, about two thirds (67%) said what the public thinks had a high-to-moderate impact on how they operate. In 2022, this dropped to 59%.

- Producers in Quebec (61%), Atlantic Canada (59%), Ontario (56%) and British Columbia (54%) are more likely to say that public perceptions have a high to moderate impact on how they operate their farms, compared to producers in Saskatchewan (38%), Alberta (41%) and Manitoba (46%) who are less likely to be impacted by public opinion.
- Producers of dairy and milk production farms (62%) and animal and livestock farms (60%) followed by produce farms (56%) also say they are at least moderately impacted by public opinion.
- Notably, producers who are under 65 years old (54%) are more likely to feel that public perception has an impact on their farm operations versus those 65 years and over (45%).

Table 15 – Q35. To what extent do public perceptions about agriculture and food production impact the way you operate your farm and the decisions you make? Base: Total (n=1,351)

	2024	2022	2018	2017
High to Moderate Impact (Very high/High/Moderate)	**49%**	**59%**	**67%**	**67%**
Low Impact (Low/Very Low)	**34%**	**27%**	**22%**	**23%**
Very high impact	4%	8%	11%	11%
High impact	13%	19%	20%	19%
Moderate impact	32%	32%	36%	37%
Low impact	20%	18%	12%	13%
Very low impact	14%	9%	10%	10%
No impact	16%	14%	11%	9%
Don't know/Prefer not to say	1%	1%	1%	-

Most producers heavily rely on friends and personal contacts (78%), followed by agrologists or other advisors (67%) to make decisions on which practices to implement on their farms. A majority also say they rely on their equipment or supply vendors (59%) and industry associations (57%) for advice.

- Farms with $500K or more in revenue sales are much more likely to turn to agrologists (83%), their equipment or supply vendors (70%) and industry associations (72%) for advice on which practices to implement than farms with income under $500K (63%, 55% and 53% respectively).

Social media (41%) and podcasts (26%) are also emerging sources of information. Notably, producers of all ages are almost equally likely to mention social media as an information source.

Table 16 – Q34. Which of the following sources of information do you rely on to make decisions on which practices to implement on your farm? Base: Total (n=1,351)

	Total	ATL	QC	ON	MB	SK	AB	BC
Friends, neighbours or other personal contacts	78%	87%	70%	82%	86%	80%	78%	69%
An agrologist or other advisor	67%	65%	85%	64%	69%	66%	67%	47%
An equipment or supply vendor	59%	63%	73%	60%	58%	52%	52%	60%
Industry association	57%	78%	41%	71%	51%	47%	60%	58%
Social media	41%	44%	44%	40%	32%	42%	42%	43%
Podcast	26%	36%	12%	30%	26%	29%	27%	22%
Responses in the total column for 2024 wave that are less than 10% are not shown.								

Actions taken to manage emergency risks

Canadian producers claim to be well prepared to face emergencies – that is, nine in ten (89%) have taken at least one action to manage or plan for emergencies and risks that their farm operations may face. Over half have taken environmental and sustainability measures (57%) and have ensured back-up power generation or infrastructure enhancements (54%). Nearly half (46%) have a traceability system in place and 39% have developed an Emergency Plan outlining all steps to take in such a situation. At least two fifths of producers have taken biosecurity (42%) and animal welfare (40%) measures.

- Producers in Quebec (68%), Atlantic Canada (67%), Manitoba (64%) and Ontario (60%) are more likely to have taken environmental and sustainability measures than those in Alberta (54%), British Columbia (47%) and Saskatchewan (46%).
- Dairy and milk production farms (67%) and produce farms (65%) are more likely to take environmental and sustainability measures for emergency risks even though a smaller proportion of these farms faced extreme weather fluctuations in the past two years. Meanwhile, cattle ranching farms (54%), oilseed and grain farms (56%), and animals and livestock farms (48%), many of whom faced droughts, are relatively less likely to report taking these measures.
- In general, farms with income of $500K or more are more likely to report taking multiple steps to prepare for emergencies compared to farms with income of less than $500K. The former group is also more likely to have an Emergency Plan set up (50% versus 35% of farms with income under $500K) and to have participated in a business risk management program offered by the government (46% versus 27% respectively).

Table 17 – Q10. What actions have you taken to manage or plan for the emergency risks that your farm operation may face? Have you implemented…? Base: Total (n=1,351)

	2024	2022*	2018*
Environment and/or sustainability measures	57%	71%	62%
Back-up power generation/infrastructure enhancement	54%	48%	48%
Traceability system	46%	56%	53%
Biosecurity measures (plant/animal disease)	42%	40%	36%
Animal welfare measures	40%	55%	52%
Developed an Emergency Plan that outlines procedures to take in an emergency**	39%	35%	33%
Participation in a business risk management program offered by government	32%	38%	39%

Other Responses are 5% or less and are therefore not shown.

*In 2024, some of the options provided are different from those in 2018 and 2022. Thus, the results cannot be directly compared with 2018 and 2022 results. However, where the context or language used is similar, tracking data is shown.

**Asked as a separate question in 2018 and 2022: Do you have an Emergency Management Plan in place for your farm operation? Results cannot be directly compared due to the method in which the question was asked and changes in the question wording. However, as it is indicative of an Emergency Plan, results from 2018 and 2022 are shown in the table.

3. Agriculture and Agri-Food Canada (AAFC) initiatives

Awareness of AAFC initiatives

Most producers (90%) are aware of at least one AAFC program or initiative, with a majority saying they have seen, heard, or read about AgriStability (78%) and AgriInvest (74%). A slim majority also report being aware of AgriInsurance (56%) and the Advance Payment Program (51%). The other AAFC programs and initiatives tested are lesser known.

Table 18 – Q44. Have you seen, heard, or read anything about each of the following programs or initiatives? Base: Total (n=1,351)

	Total	Farm Income (Under $500k)	Farm Income ($500k or more
Heard, seen, or read of any one program	**90%**	**88%**	**97%**
AgriStability	78%	74%	91%
AgriInvest	74%	69%	90%
AgriInsurance	56%	55%	61%
Advance Payment Program	51%	46%	70%
AgriRecovery	36%	33%	45%
Sustainable Canadian Agricultural Partnership	32%	27%	46%
AgriInnovate Program	24%	22%	29%
Agricultural Clean Technology Program	24%	22%	31%
Agricultural Climate Solutions	23%	22%	30%
Food Waste Reduction Challenge	20%	21%	19%
Dairy Direct Payment Program	18%	15%	30%
Local Food Infrastructure Fund	14%	14%	12%
None of the above	10%	12%	3%

Of producers who are familiar (90%) with at least one of AAFC's initiatives, the majority (64%) have applied to at least one such initiative for funding or support. The likelihood of applying to a program is directly linked to the level of awareness of the program. As producers are most aware of AgriStability and AgriInvest, they are also more likely to apply to these programs for funding and support – a majority of producers say they have applied to AgriInvest (71%) and AgriStability (67%). Although awareness is moderately high for AgriInsurance and the Advance Payment program, fewer (29% and 28% respectively) have applied to them.

- Awareness of AAFC's initiatives is highest among producers in Saskatchewan (95%), while being the lowest among producers in British Columbia (81%) and Ontario (86%).

- Alberta (72%), Quebec (68%) and Saskatchewan (67%) producers are more likely to report applying for at least one of the AAFC initiatives. This proportions drops somewhat among Atlantic Canada (58%) and Ontario (58%) producers, while less than half (48%) of producers in British Columbia say they have taken advantage of these initiatives. Low uptake of these programs in British Columbia is likely connected to the low awareness levels there.
- Farms with higher income levels ($500K or more) are much more likely to be aware of the AAFC initiatives (97% versus 88% of farms with income under $500K) and are also more likely to have applied to at least one of the programs (85% versus 57% respectively). Of note, even though AgriInvest is designed to help support small farming income declines, awareness of this program is much higher among farms with incomes of $500k a year or more (90%) than for smaller farms (61% for farms under $100k and 79% for farms from $100k to $500k).

Among those aware of AgriStability but did not apply for it, about a third (32%) say they did not need the program, while few say the program did not benefit them (11%). Just one in ten say they did not qualify for it (10%), and fewer than one in ten say the application was too complex (9%) or too costly (8%).

Table 19 – Q45. Have you applied to any of the programs I just listed for funding or support? Base: Respondents familiar with at least one program (n=1,273)
Q46. Which of the following did you apply to? Base: Respondents who applied to programs (n=947)

	Total	Farm Income (Under $500k)	Farm Income ($500k or more
AgriInvest	71%	65%	81%
AgriStability	67%	66%	69%
AgriInsurance	29%	26%	34%
Advance Payment Program	28%	24%	36%
Dairy Direct Payment Program	12%	9%	19%
AgriRecovery	12%	13%	10%
Agricultural Climate Solutions	5%	5%	5%
Agricultural Clean Technology Program	4%	2%	9%
AgriInnovate Program	3%	2%	6%
Food Waste Reduction Challenge	2%	2%	1%
Responses for the total results that are less than 2% are not shown.			

Just under one third (32%) of producers say they have heard, seen or read about the Sustainable Canadian Agriculture Partnership. Additionally, a similar proportion (38%) say they are very or somewhat familiar with the programming or services available under this initiative. While general awareness of the initiative is at the same level as seen in 2022 (34%) and somewhat higher than in

2018 (28%), familiarity with the details is much lower in 2024 than previous years (2018: 47% and 2022: 50%).

Table 20 – Q48. How familiar are you with programming and services available under the Sustainable Canadian Agricultural Partnership? Base: Respondents who have seen, read, or heard of the Sustainable Canadian Agricultural Partnership (n=522)

	2024	*2022	*2018
Familiar (Very / Somewhat)	**38%**	**50%**	**47%**
Not familiar (Slightly / Not at all)	**62%**	**50%**	**52%**
Very familiar	8%	10%	13%
Somewhat familiar	30%	40%	34%
Slightly familiar	37%	36%	35%
Not at all familiar	25%	15%	17%
Don't know/prefer not to say	0%	0%	1%

* In 2018 and 2022, producers were asked about the Canadian Agricultural Partnership. In 2024, producers were asked about the Sustainable Canadian Agricultural Partnership, a new partnership introduced in 2023.

Among those that are aware of the Sustainable Canadian Agricultural Partnership, close to half (47%) have a positive impression of the program, with a significant portion (41%) of respondents saying they are neutral (34%) or unsure of their opinion (6%). Only one in ten (12%) hold a negative view. When compared to previous years, positive ratings have returned to the 2018 (49%) level after spiking in 2022 (58%). However, negative ratings continue to decline gradually.

- Awareness of (46%) and familiarity with services available under (49%) the Sustainable Canadian Agriculture Partnership is significantly higher among $500K or more income farms compared to arms with less than $500K revenue (27% awareness and 32% familiarity). However, both cohorts hold nearly similar positive impressions of the program (49%, $500K or more and 46%, Under $500K).
- Producers in Atlantic Canada (54%) and Manitoba (45%) are more likely to say they are aware of this partnership compared to others, while just 15% in British Columbia are aware.

Table 21 – Q47. What's your impression of the Sustainable Canadian Agricultural Partnership? Base: Respondents who have seen, read, or heard of the Sustainable Canadian Agricultural Partnership (n=522)

	2024	*2022	*2018
Positive (Very / Somewhat positive)	**47%**	**58%**	**49%**
Negative (Somewhat / Very negative)	**12%**	**16%**	**25%**
Very positive	7%	9%	10%
Somewhat positive	40%	49%	39%
Neither positive nor negative	34%	22%	20%
Somewhat negative	9%	11%	14%
Very negative	3%	5%	11%
Don't know/prefer not to say	6%	4%	6%
* In 2018 and 2022, producers were asked about the Canadian Agricultural Partnership. In 2024, producers were asked about the Sustainable Canadian Agricultural Partnership, a new partnership introduced in 2023.			

Mental health

Over half (54%) of producers are aware of mental health support services or initiatives aimed specifically at Canadian producers and their families. However, just 2% of those who are aware, or only 1% of all producers, say they have accessed these services.

- Awareness levels are similar across age groups. Overall, 3% of producers under 55 and 1% of producers 55 and older have used mental health services.

Table 22 – Q50. Are you aware of any mental health support services or initiatives aimed specifically at Canadian farmers and their families? Base: Total (n=1,351)

	Total	ATL	QC	ON	MB	SK	AB	BC
Yes	54%	60%	50%	60%	68%	62%	49%	25%
No	46%	40%	50%	40%	30%	38%	51%	75%
Don't know/Prefer not to say	-	-	-	-	2%	-	-	-

4. Future expectations

Though Canadians in general have grown more pessimistic about their economic future in recent years, more agriculture producers feel their farm operation will be better off (32%, down 4%) in five years than who feel it will be worse off (28%, unchanged).

These expectations are consistent with recent income growth, as just over a third (37%) of producers report that their net farm income has increased during the last five years, while 29% say it has decreased.

- Producers in Atlantic Canada (+24% better minus worse), Quebec (+17%), British Columbia (+17%) and Manitoba (+13%) are much more likely to expect their farm operations will be better off in the next five years than worse off, while the converse is true for producers in Alberta (-5%), Ontario (-2%) and Saskatchewan (-1%).
- Except for oilseed and grain producers who feel they will be worse off than better off (-8%), all other producers are expecting their farm operations to improve over the course of the next few years than decline. It is noteworthy, that even though dairy producers are most likely to expect an increase in production and input costs over the next five years, they are most optimistic about their farm operations compared to others (44% better off versus 24% worse off).

Table 23 – Q6. Looking ahead, how much better or worse off will your farm operation be in 5 years, compared to how it is now? Base: Total (n=1,351)

	Total	ATL	QC	ON	MB	SK	AB	BC
Better Off (Much/a little)	32%	44%	41%	33%	33%	29%	25%	35%
Worse Off (Much/a little)	28%	20%	24%	34%	20%	30%	29%	19%
Better Off minus Worse Off	**+4%**	**+24%**	**+17%**	**-2%**	**+13%**	**-1%**	**-5%**	**+17%**
Much better	7%	8%	10%	8%	4%	5%	4%	16%
A little better off	25%	36%	31%	25%	30%	24%	21%	20%
A little worse off	16%	7%	13%	21%	14%	19%	17%	11%
Much worse off	12%	13%	10%	14%	7%	11%	13%	8%
I don't expect any change in the next five years	33%	31%	32%	27%	30%	35%	39%	37%
Don't know/Prefer not to say	7%	6%	3%	6%	16%	7%	7%	9%

Producer profiles

Women producers

One in four (26%) producers surveyed are women. There has been a small and gradual increase in the share of women producers over time; back in 2013, only 22% of producers surveyed were women. In the long run, this trend should increase, as the population of women producers is slightly younger than the population of men producers.

There are higher proportions of women producers in Alberta (32%) and British Columbia (31%), while Manitoba (8%) has the lowest proportion of women producers. Women are found in higher proportions in animal/livestock farms (34%), cattle ranching farms (30%), and plant/tree farms (30%). There are fewer women producers in oilseed/grain farms (18%).

Moreover, women producers tend to be on smaller farms; they make up one-third (33%) of the respondents from farms earning under $100,000 a year, but this figure decreases down to 14% among farms earning $1 million or more.

Women producers are somewhat more likely to say their net farm business income has decreased during the past five years (36%) compared to men (27%). That said, they are slightly more likely to say their household receives off-farm income (52% versus 47% men). Their outlook towards their farm's future is similar to the men – 33% among both women and men feel their farm operation will be better off in the next five years, with women just slightly less pessimistic than the men (26% versus 29% worse off). However, compared to 2022 (42%), the positive outlook among women producers appears to have reduced notably.

When looking at future issues facing Canadian agriculture, women are equally likely to mention climate change (27%) and operational expenses (27%) as the main issues, while men are more likely to cite operational expenses (26%) rather than climate change as the main issue (17%). However, both men and women give almost equal priority to implementing environmental and sustainability measures on their farms (43% and 46% high priority respectively).

Women are less likely to be concerned about cyber security incidents than men (35% versus 42% concerned), but report being somewhat more prepared for such incidences than men (39% versus 32%).

Women producers are more likely to be aware of mental health services than men (60% versus 53%).

Young producers, under 45 years

14% of producers surveyed are under the age of 45, with this figure down from 17% in 2013. Younger producers count a slightly higher share of women (28%) than older producers (25%).

Producers surveyed in British Columbia (21%) and Quebec (20%) are the most likely to be under 45, while the producer population skews older in Saskatchewan (only 4% are under 45 years).

Farms with incomes of $500K and above (23%) are more likely than smaller farms (income under $500K; 11%) to be led by younger producers. Young producers (55%) are somewhat more likely to say they receive off-farm income compared to those who are 45 years and older (47%)

Produce farms (23%) and dairy and milk production farms (23%) attract more younger producers, while cattle ranching farms (6%) and oilseed and grain farms (10%) are least likely to be led by younger producers. They are somewhat more likely to have organic certified farms (18%) compared to producers 45 years and older (10%).

Producers under 45 years have a much more optimistic outlook towards the future of their farm compared to older producers. 44% of young producers expect their farm's future to be better off versus 22% that expect it to be worse off. This is in line with their farm's recent performance, where 47% report that their farm income has increased in the past five years compared to only 22% saying it has decreased. In comparison, those over 45 years are less likely to feel their farm's future is better off (30% better off versus 29% worse off) and are also less likely to report that their net income has increased in the past five years (35% increase versus 31% decrease).

It is noteworthy that although this cohort mentions climate change impacts (46%) as the primary issue their farms have faced, they are less likely to do so than those 55-64 years (53%) or those age 65 and older (54%). Likewise, they are also more likely to mention production and input costs (30%) as the main issue that their farms may face in the future followed by climate change (14%). They are less concerned about future risks as they are slightly more likely to report being prepared for emergencies and have infrastructure enhancements in place than producers over 45 years. Moreover, young producers are also slightly more likely than older producers to turn to agrologists, equipment and supply vendors and other advisors for advice on which practices to implement on their farms.

At least half (51%) of young producers report experiencing labour shortages. They are more likely than older producers to have tried to overcome this by hiring temporary foreign workers (31%).

Young producers are less concerned about cyber security incidents (30%) compared to older producers (44% among 55 years and older), perhaps because they are more likely to feel prepared to deal with such incidents (39%).

Producers across all age groups are almost equally aware of mental health support services. However, young producers are more likely to have accessed these supports (2.5%) than those 45 years and older (less than 1%), in line with similar trends seen among the general public.

Older producers, 65 years and over

Half (51%) of producers surveyed are 65 years and over – these proportions are higher than seen in 2018 (35%) and 2022 (38%). Older producers are much more likely to be men (52%) than women (43%).

Older producers are more likely to be on farms in Saskatchewan (74%), Manitoba (64%), Atlantic Canada (58%) and Alberta (56%). There are fewer older producers in Ontario (43%) and British Columbia (37%), with the smallest proportions in Quebec (28%).

Cattle ranching farms are the most likely to be led by older producers (64%), followed closely by oilseed and grain farms (58%). Just over two-fifths animal and livestock farms (45%) and produce farms (42%) are led by older producers. Older producers are less common on plant and trees (30%) and dairy and milk production farms (34%).

Farms with incomes of under $500K (57%) are much more likely than mid-to-high income farms (income of $500K or more 31%) to be led by producers 65 years and older. Older producers (41%) are less likely to report receiving off-farm income compared to producers under 65 years (55%).

Older producers have mixed views when it comes to their farm's business performance over the past 5 years: 35% say their net income has grown, 32% say it has stayed the same and 32% say it has decreased. Similar sentiments are expressed when it comes to the future of their farms: while 30% feel their farm will be better off, 25% say it will be worse off, with a larger 38% believing it will stay the same. In comparison, those under 65 years feel better about their financial situation with 39% reporting an increase in net income (versus 27% decrease) and 35% expecting their farm's future to be better off in the next five years (versus 32% worse off).

Older producers are significantly less likely to have experienced labour shortages over the past two years (31%) and thus are less likely to be concerned about labour shortage in the future (4%) and are less likely to hire temporary foreign workers (12%) compared to producers under 65 years (46% experience labour shortage; 10% concerned; and 22% hired temporary foreign workers).

Compared to producers under 65 years (49%), producers 65 years and older (38%) are significantly less likely to consider implementing environment and sustainability practices on their farms as a high priority. Indeed, older producers are less likely to have implemented such measures on their farms – notably, they are less likely to have reduced fertilizer use (48% versus 58%), improved biodiversity (48% versus 61%) and taken actions to reduce food loss (47% versus 55%). However, they are more likely to have zero/low till systems (66% versus 57%).

Older producers are more concerned about cyber security incidents (44%) compared to those under 65 years (37%), probably because they feel less prepared to deal with such incidents (30% versus 38% respectively).

Organic certified producers

Note: Organic certified producers include those whose farms are already certified as well as those who are in the process of obtaining the certification.

One in ten (11%) producers surveyed report that their farm is organic certified (9%) or are in the process of obtaining an organic certification (2%). The proportion of farms with an organic certification remains consistent compared to 2022 (11%). Producers younger than 45 years (18%) and 65 years and older (13%) are more likely to say their farms are organic certified, compared to producers aged 45-54 (8%) and 55-64 (6%) years.

Producers in British Columbia (18%), Quebec (16%), Ontario (13%), and Atlantic Canada (12%) are more likely to report that their farms are organic certified or are in the process of it, while fewer farms in Saskatchewan (10%), Alberta (7%) and Manitoba (5%) are organic certified. Consistent with this year's findings, a higher number of farms in British Columbia (21%) and Quebec (17%) reported being organic certified in 2022.

Produce farms (19%) are most likely to report being organic certified, followed by dairy and milk production farms (15%), plant and trees farms (12%), animal and livestock (10%), and oilseed and grain farms (10%), and only 6% of cattle ranching producers say they are certified. Similar proportions of high income ($500K or more; 10%) and mid to low income (Under $500K; 12%) farms report having an organic certification. Half of the organic certified farms receive off-farm income (49%), while an equal proportion reports not receiving such income (51%).

Organic certified producers are more likely to expect their farm's future to be better off (43%) than worse off (19%) and have a notably more positive outlook than those who are not certified (31% better off versus 29% worse off). In terms of business performance, both cohorts experienced similar increases and decreases in net income over the past five years.

There are no remarkable differences between organic certified and non-certified farms when it comes to challenges and risks faced. However, organic certified farms are less likely to feel production and input costs will be a challenge in the future compared to the latter (14% versus 27%).

Over half (54%) of the organic certified producers say they have experienced labour shortages over the past two years compared to the non-certified farms (36%). They are also slightly more likely to hire temporary foreign workers (23% versus 16% non-certified farms).

Organic certified producers (67%) are much more likely to assert a high priority on implementing environmental practices on their farms compared to those who are non-certified (40%). They are significantly more likely than non-certified producers to have implemented food safety measures (81% versus 56%), improved biodiversity (80% versus 51%), environmental stewardship programs (72% versus 57%), and improved water quality (63% versus 44%).

Brief overview on the profiles of different types of farms

Oilseed and grain farms (27%)

- More common in Saskatchewan (50%), Manitoba (32%), Alberta (30%), and Quebec (25%), and least common in Atlantic Canada (4%).
- Producers 65 years and older (31%) are more likely to run oilseed and grain farms than those under 65 years (23%).
- 30% of men and 19% of women run oilseed and grain farms
- More common among farms with incomes of $500K or more (34%) than among those with less than $500K (25%).
- Top 3 issues are impacts of climate change (56%), increased operational costs (38%) and market price fluctuations/volatility (28%).
- Are more likely to feel their farm's future will be worse off than better off (32% versus 25%).
- 29% of these farms have faced labour shortages, and 9% have employed temporary foreign workers. These farms are less likely to have labour shortages and are least likely to have employed foreign workers compared to the other farms.
- A similar share of non-organic certified (27%) and organic certified (24%) farms are oilseed and grain farms.
- 42% of oilseed and grain farms say they receive off-farm income.

Cattle ranching farms (21%)

- More common in Alberta (37%), Saskatchewan (30%), and Manitoba (26%), and least common in Quebec (7%).
- Producers 65 years and older (27%) are more likely to run cattle ranching farms than those under 65 years (16%).
- 25% of women and 20% of men run cattle ranching farms.
- More common among farms with incomes under $500k (24%) than among those with $500k or more (11%).
- Top 3 issues are impacts of climate change (48%), increased operational costs (29%) and market price fluctuations (30%). Cattle producers are also more concerned with the carbon tax (12%) compared to other farm types.
- Are split on whether their farm will be better off or worse off in the future (28% versus 26%).
- 27% of these farms have faced labour shortages, and 11% have employed temporary foreign workers.
- Non-organic certified (23%) are more likely than organic certified (11%) farms to be cattle ranching farms.
- Half (51%) of cattle ranching farms say they receive off-farm income.

Produce farms (16%)

- More common in Atlantic (44%), British Columbia (36%), and Ontario (27%), and least common in Alberta (3%).
- Producers under 65 years (18%) are more likely to run produce farms than those 65 years and older (13%).
- The same share (16%) of men and women run produce farms.
- A similar share of farms with incomes of $500k or more (18%) and less than $500k (15%) are produce farms.
- Top 3 issues are impacts of climate change (59%), increased operational costs (28%) and profitability of farming sector (23%). Produce farms are most likely to face labour shortages (14%) compared to other farms.
- Are more likely to feel their farm's future will be better off than worse off (37% versus 33%).
- 57% of these farms have faced labour shortages, and 32% have employed temporary foreign workers. These farms are most likely to have faced labour shortages and are most likely to have employed foreign workers compared to the other farms.
- Organic certified farms (27%) are more likely than non-organic certified farms (14%) to be produce farms.
- Half (51%) of produce farms say they receive off-farm income.

Animal and livestock farms (12%)

- More common in British Columbia (20%), and Manitoba (16%), and found at a similar incidence (between 8% to 12%) among the other provinces.
- Producers under 65 years (13%) are slightly more likely than producers 65 years and older (10%) to run animal and livestock farms.
- A higher share of women (15%) than men (10%) run animal and livestock farms.
- A slightly higher share of farms with incomes less than $500K (12%) compared to $500K and over (9%) are animal and livestock farms.
- Top 3 issues are impacts of climate change (34%), increased operational costs (33%) and diseases or pests (24%).
- Are more likely to feel their farm's future will be better off than worse off (34% versus 25%).
- 46% of these farms have faced labour shortages, and 21% have employed temporary foreign workers.
- A similar share of organic certified (10%) and non-organic certified (12%) farms are animal and livestock farms.
- Over half (54%) of animal and livestock farms say they receive off-farm income.

Dairy, cattle and milk production farms (9%)

- More common in Quebec (27%), followed by Ontario (12%) and Atlantic Canada (10%). These farms are only present between 1% to 6% among the other provinces.
- Producers under 65 years (12%) are twice as likely as those 65 years and older (6%) to run dairy, cattle and milk production farms.
- A similar share of men (9%) and women (10%) run dairy, cattle and milk production farms.
- More farms with incomes of $500K or more (16%) than those with incomes less than $500K (7%) are dairy, cattle and milk production farms.
- Top 3 issues are impacts of climate change (43%), increased operational costs (32%) and interest rates (30%).
- Are much more likely to feel their farm's future will be better off than worse off (44% versus 24%). These farms are most optimistic about their future compared to the others.
- 49% of these farms have faced labour shortages, and 22% have employed temporary foreign workers.
- Slightly more organic certified (12%) than non-organic certified (9%) farms are dairy, cattle and milk production farms.
- One thirds (35%) of dairy, cattle and milk production farms say they receive off-farm income.

Appendix

Appendix A: Quantitative research methodology

Pollara conducted telephone surveys, using Computer-Aided Telephone Interviewing (CATI) technology, with 1,351 agricultural producers across Canada. A detailed discussion of the approach used to complete this research is presented below.

Sample design

The sampling plan for the study was designed by Pollara in collaboration with Agriculture and Agri-Food Canada (AAFC). The research requirement entailed collecting samples from the following:

- Agricultural producers, who are 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 following regional quotas were assigned:
    - 100 in Atlantic Canada, 400 in Quebec, 250 in Ontario, 300 in Manitoba/Saskatchewan, 200 in Alberta, 100 in British Columbia.
    - These were adjusted during the field process based on available sample.

Sample was obtained from Dunn & Bradstreet of agriculture producers.

Data collection

The surveys were conducted in English and in French, based on the respondent's preference, from January 14, 2024, to February 26, 2024. Both landlines and cell phones were dialed, and up to 5 call-back attempts were made to every number. The average length of the telephone interviews was 20 minutes.

The introduction to the phone survey stressed that participation in the survey was voluntary, and that information provided would remain private and confidential, in compliance with the Privacy Act and the Personal Information Protection and Electronic Documents Act (PIPEDA). Participants were provided assurance that none of their identifiable information would be shared with AAFC.

Pollara conducted 1,351 interviews. Considering the total population of agricultural producers in Canada, the margin of error for a probability based sample of 1,351 producers would be ±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. Statistical differences between sub-groups or between waves are determined based on Z-test testing at 95% confidence.

To achieve data reliability in all subgroups, Canadian producers were surveyed in all regions of the country. Demographic information of respondents was collected, and the final data was weighted by province and farm sales based on Statistics Canada's 2021 Census of Agriculture.

The table below presents the geographic and demographic distribution of respondents, before and after weighting.

Respondents Total Distribution

Region	Unweighted total	Weighted total
Atlantic Canada	73	44
Quebec	429	209
Ontario	283	344
Manitoba	83	103
Saskatchewan	224	243
Alberta	196	295
British Columbia	113	113

Respondents Total Distribution

Language	Unweighted total	Weighted total
English	929	1144
French	422	207

Respondents Total Distribution

Farm Revenue	Unweighted total	Weighted total
$10,000 to just under $50,000	109	409
$50,000 to just under $100,000	119	203
$100,000 to just under $250,000	204	249
$250,000 to just under $500,000	206	173
$500,000 to just under $1,000,000	229	94
$1,000,000 or more	484	223

Respondents Total Distribution

Age	Unweighted total	Weighted total
Under 45	252	185
45-54	223	180
55-64	350	302
65 and over	526	684

Respondents Total Distribution

Respondent	Unweighted total	Weighted total
Men	1032	954
Women	276	345
Other	43	51

The following tables presents the distribution of farm operations according to province:

Weight Factors by Province

Label	Equation	Weight
ATL – Atlantic		3.2290%
QC – Quebec	PROV =QC	15.4734%
ON – Ontario	PROV =ON	25.4621%
MB – Manitoba	PROV =MB	7.6593%
SK - Saskatchewan	PROV =SK	17.9740%
AB - Alberta	PROV =AB	21.8592%
BC - British Columbia	PROV =BC	8.3429%

The following tables presents the distribution of farm operations according to revenue level:

Weight Factors by Revenue Level

Label	Equation	Weight
$10,000 to just under $50,000	Q2=2	30.3%
$50,000 to just under $100,000	Q2=3	15.0%
$100,000 to just under $250,000	Q2=4	18.4%
$250,000 to just under $500,000	Q2=5	12.8%
$500,000 or more	Q2=6,7	23.5%

Quality controls

Prior to launching the survey, Pollara tested the links to ensure programming matched the questionnaire in both languages and included the correct use of skips and randomizations. A "soft launch" of the survey was conducted first to validate the programming and to ensure respondents did not have any issues with the question wording. Pollara reviewed soft launch data and listened to recordings of the soft launch interviews before proceeding to full launch.

Participation rate

A total of 11,459 producers were attempted to be reached for this project. The refusal rate for this survey was 36%, while the participation rate was 33%. Though this is a relatively high participation rate for public opinion research, the risk of non-response bias is still present. Producers who do not have the time to take a survey might be more common on certain types of farms. That said, even if non-response bias exists, results should still be comparable to past waves, as those were fielded using a similar methodology.

Full contact statistics are provided below:

Total numbers attempted	**11,459**
Out-of-scope – invalid	**2,340**
Unresolved – no answer, answering machine	**3,741**
Refusals	**1,711**

In-scope – non-responding	**635**
Language barrier	38
Incapable of completing (ill)	218
Callback - not available	379
In-scope – responding	**3,032**
Incomplete	117
Callback – did not complete	596
Did not qualify - Q1 (Not decision maker)	122
Did not qualify - Q2 (Not enough sales)	162
Did not qualify - Q3 (Age)	33
Did not qualify – no longer on farm	651
Completes	1,351

Appendix B: Survey questionnaire

Strategic Issues Survey with Producers -Wave VIII

2023-2024

Note to interviewers: Be proactive if you feel that respondents are not in a good environment (too much noise) or other good conditions to answer the questionnaire. In these cases, schedule a telephone appointment to administer the survey.

Good morning/afternoon/evening. My name is _____ and I am calling from Pollara, a public opinion research company. Would you prefer that I continue in English or French? Préférez-vous que je continue en français ou en anglais?

We are conducting a study of agricultural producers on behalf of Agriculture and Agri-Food Canada about some important issues facing the sector across Canada. Your participation is voluntary, and the survey will take about 20 minutes to complete. Please be assured that your identity and individual answers will be kept strictly confidential.

Note to interviewers: If respondent has concerns about privacy, read the following: Any information you provide will be administered in accordance with the Privacy Act and other applicable privacy laws. Your decision to participate or not will not affect any dealings you may have with the Government of Canada in any way.

Note to interviewers: If the respondent wants more information about the survey, read the following: The research is designed to provide AAFC with key insights into the views of producers on current issues in agriculture in Canada and on priorities and policies that affect the agriculture and agri-food sector in Canada.

Note to interviewers: If a respondent asks you about the legitimacy of this project or if the respondent wants to make a complaint or a comment about this project, they may call 416-921-0090.

Note to interviewers: If a respondent requests to speak with a study leader at Agriculture and Agri-Food Canada, please take his / her name and phone number and mention that a supervisor will call back to establish the link with Agriculture and Agri-Food Canada.

A. Screeners

Language: [Interviewer recorded]

1. English
2. French

[Ask all]
Screen1. Have I reached you on a cellular phone? [do not read list]

1. Yes
2. No

[Ask if screen1=yes]
Screen2. Are you in a safe place to talk on the telephone? [do not read list]

1. Yes
2. No

[If screen2=no, read:] We would like to conduct this interview with you when it is safe and convenient to do. Thank you for your time, we will call back when it is more convenient.

SCREEN3. Before we begin the interview, I am required to inform you that for quality control reasons, this interview may be recorded. May we begin?

1. Yes
2. No [thank and terminate]

B. Business Profile

1. First, may I confirm that you are one of the decision makers for your farm operation?
[Interviewer note]: If required, read: "In other words, do you make the business and financing decisions regarding your farm operation?"
    a. Yes
    b. No [thank and terminate]
    c. Joint

[If yes or joint, continue. If no, ask to speak to that person, read intro again. If unavailable, arrange callback. If no decision maker thank and terminate.]

2. What were the total gross sales of your farming operation in 2023? Just stop me when I reach the correct category. [read list]
    1. Less than $10,000 [thank and terminate]
    2. $10,000 to just under $50,000

3. $50,000 to just under $100,000
4. $100,000 to just under $250,000
5. $250,000 to just under $500,000
6. $500,000 to just under $1,000,000
7. $1,000,000 or more
99. Don't know/Prefer not to say [thank and terminate]

3. For classification purposes, in what year were you born?
   [enter number] [if more recent than 2005, thank and terminate]
   99. Don't know/Prefer not to say [thank and terminate]

C. Farm Operation and Risk Management

Now, we'd like to know a bit more about your farm operation and how you manage risk to your business.

4. In 2023, what type of production contributed most to your gross farm revenue? [do not read list; accept 1 response]
   1. Oilseed and grain farming (for example, soybean, canola, flaxseed, mustard seed, safflower and sunflower, dried peas, dried beans, lentils, wheat, corn, rice, wild rice, or buckwheat) (1111)
   2. Cattle ranching and farming (for example, cow/calf, backgrounding, feedlot) (11211)
   3. Dairy cattle and milk production (11212)
   4. Beekeeping (112910)
   5. Forage (311119)
   6. Poultry farming (1123)
   7. Pig farming (11221)
   8. Vegetable farming (11121)
   9. Fruit farming (1113)
   98. Other types of farm production (for example, greenhouse production, aquaculture, sheep and goat farming) [interviewer type in] _____
   99. Don't know/Prefer not to say [volunteered]

5. Looking ahead, what do think will be the single most important issue facing Canadian agriculture over the next 5 years? [do not read list; accept 1 response]
   1. Production costs/input costs
   2. Commodity prices/variable prices
   3. Profitability/viability of farming sector/making a living/returns covering costs
   4. Trade/international trade barriers
   5. Fewer farm families/succession issues
   6. Less farmland/farms closing
   7. Labour shortages/availability/labour (general)
   8. Farmers need more support/aid
   9. Food labelling/legislation

10. Climate change impacts/natural disasters and extreme weather fluctuations (for example, floods, droughts, enough rain/moisture)
11. Changing consumer demand
12. Carbon tax
13. Government intervention (policy, regulation, interference)
14. Public perceptions (trust, understanding)
15. Fertilizer emission reduction target
16. Environmental concerns (soil health, biodiversity, and water quality)
98. Other [interviewer type in] _____
99. Don't know/Prefer not to say [volunteered]

6. Looking ahead, how much better or worse off will your farm operation be in 5 years, compared to how it is now? [read list]
    1. Much better off
    2. A little better off
    3. A little worse off
    4. Much worse off
    5. I don't expect any change in the next five years
    99. Don't know/Prefer not to say [volunteered]

7. What type of business risks does your farming operation face? [do not read list; accept up to 3 responses]

    [interviewer note, if required] Prompt the respondent: Are there any others?
    [interviewer note, if required] Examples could be: access to markets, increased costs, diseases or pests, or weather fluctuations
    1. Diseases or pests (for example, mad cow, avian influenza, African Swine Fever, or crop blight)
    2. Climate change impacts/natural disasters and extreme weather fluctuations (for example, floods, droughts)
    3. Market price fluctuations/volatility
    4. Trade barriers/Barriers to market access
    5. Changing government policies and programs
    6. Food safety crisis/problems
    7. Contamination (for example, to ground water)
    8. Increased operational/production/input costs (for example, fuel, chemicals, fertilizers, labour costs)
    9. Negative public perceptions/public trust (for example, concerns about animal welfare)
    10. Increased pressure from value-chain members (for example, increased sustainability demands from retailers)
    11. Taxes/Carbon Tax
    12. Interest rates
    13. Profitability/Viability of Farming Sector/Making a Living/Returns Covering Costs
    14. Fewer farm families/succession issues
    15. Increasing competition
    16. Marketing
    17. Digitization

18. Cyber Risks
98. Other [interviewer type in] _____
99. Don't know/Prefer not to say [volunteered]

8. Which of the following emergencies has your farming operation experienced in the last two years? [randomize] [read list and check all that apply]
    1. Wildfire
    2. Flood/Excess precipitation
    3. Hurricane
    4. Animal disease
    5. Plant disease
    6. Cybersecurity attack
    7. Drought
    99. None of them [volunteered] [exclusive]

10. What actions, if any, have you taken to manage or plan for the emergency risks that your farm operation may face? Have you implemented… [randomize] [read list and check all that apply]
    1. Biosecurity measures (plant/animal disease)
    2. Traceability system
    3. Back-up power generation/infrastructure enhancement
    4. Environment and/or sustainability measures
    5. Animal welfare measures
    6. Participation in a business risk management program offered by government
    7. Developed an Emergency Plan that outlines procedures to take in an emergency and the roles and responsibilities for those that are involved
    98. Anything else? [interviewer type in] _____
    99. None [volunteered] [exclusive]

D. Cybersecurity

Now we are going to talk specifically about cybersecurity and cyber incidents.

A cyber incident is any unauthorized attempt, whether successful or not, to gain access to, modify, destroy, delete, or render unavailable any computer network or system resource. Based on this definition…

11. How concerned are you, if at all, that a cyber incident could cause disruptions to your farming operation? [read list]
    1. Very concerned
    2. Somewhat concerned
    3. Slightly concerned
    4. Not at all concerned
    99. Don't know/Prefer not to say [volunteered]

12. How prepared is your farming operation to face a cyber incident? [read list]
    1. Very prepared
    2. Somewhat prepared
    3. Slightly prepared
    4. Not at all prepared
    99. Don't know/Prefer not to say [volunteered]

13. Has your farming operation ever been a victim of a cyber incident?
    1. Yes
    2. No
    99. Don't know/Prefer not to say [volunteered]

14. [If Q13=1] What type of cyber incident did you experience? [do not read list, multiple response]
    1. Email scam
    2. Text scam
    3. Virus/spyware/malware on your computer
    4. Identity theft
    5. Social media account hack
    6. Phishing
    7. Ransomware
    98. Other [interviewer type in] _____
    99. Don't know/Prefer not to say [volunteered]

E. Programs

In these next few questions we would like to understand the ways in which your farming operation may be responding to changing consumer trends.

Which of the following measures, programs or practices, if any, have you implemented? If it is not applicable to your farm operation, please say so.
[randomize and read list and check all that apply. If asked, interviewer should clarify that these programs could have been ones implemented by the farm operator on their own, with a sector/industry association or with government.]

Environment [do not read]
15. Environmental stewardship programs
16. Irrigation or water conservation plan / improving water quality
17. Actions to reduce food loss on farm
18. Beneficial manure handling
19. Measures or practices to reduce/eliminate the use of drugs or antibiotics on farm animals
20. Nutrient management plan
21. Reduced or eliminated pesticide use
22. Reduced or eliminated fertilizer use

23. Planting cover crops
24. Crop rotations
25. Zero/low till systems
26. Improving carbon storage in healthy soils
27. Reducing methane emissions
28. Improving biodiversity
Public Trust [Do not read]
29. Humane animal welfare practices
30. Enhanced food safety measures
31. Publicly talking about how your farm operates (for example, at events, farmers' markets, social media), or offering farm tours/visits
32. Participation in a sector/industry assurance program [if needed, read: Assurance systems enable the industry to make credible, meaningful and verifiable claims about its products and the manner in which they are produced.]

34. Which of the following sources of information do you rely on to make decisions on which practices to implement on your farm? [randomize and read list, check all that apply]

1. An agrologist or other advisor
2. Industry association
3. Podcast
4. Friends, neighbours or other producers
5. An equipment or supply vendor
6. Social media

98. Any others? [record verbatim]
99. None [volunteered] [exclusive]

35. To what extent do public perceptions about agriculture and food production currently impact the way you operate your farm and the decisions you make? [read list]

1. No impact
2. Very low impact
3. Low impact
4. Moderate impact
5. High impact
6. Very high impact

99. Don't know/Prefer not to say [volunteered]

[Skip question if select any of following in Q4: 2, 6, 7]
36. In the past two years, what, if any, were causes of food production losses (harvest-ready or harvested) that occurred on your farm? [do not read list, multiple response]

1. Not applicable [No food production on farm) [exclusive]
2. Did not experience losses of harvest-ready or harvested production [exclusive]
3. Rejection due to quality standards (for example, appearance, size)
4. Inadequate labour capacity
5. Equipment issues or breakdowns
6. Inaccurate supply and demand forecasting, cancelled orders/contracts

7. Inadequate storage
8. Transportation delays
9. Price volatility made harvesting unaffordable
10. Weather-related events damaged production
11. Overproduction – unable to sell all
12. Over quota (for example, dumped milk)
98. Other [interviewer type in] _____
99. Don't know/Prefer not to say [volunteered]

37. Which of the following, if anything, would increase your use of agricultural practices that can help your farm reduce emissions arising from fertilizer use?

[randomize] [read list and check all that apply]

1. Not applicable – do not use fertilizer on farm [exclusive] [always read first]
2. Clear return on investment
3. Access to services to help you decide which practices to use and how to implement them (For example, agronomist services)
4. Ability to align practices with 4R certification opportunities
5. Ability to get carbon offset credits in exchange for actions taken
6. Government funding to help with the costs

39. How much of a priority is it for you to implement environmental practices on your farm? [read list]

1. Low Priority
2. Medium Priority
3. High Priority
99. Don't know/Prefer not to say [volunteered]

F. Labour Market

The next few questions are about labour market challenges that you may or may not be experiencing.

40. In the past 2 years, have you experienced any labour market challenges? (For example, recruiting staff or training.)

1. Yes
2. No
99. Don't know/Prefer not to say

41. [If Q40=1] What labour market challenges have you faced? [do not read list; accept up to 3 responses]

1. Recruiting/attraction of low skilled/low wage staff

2. Recruiting/attraction of high skilled/high wage staff
3. Limited ability to provide training for new or existing staff
4. Access to staff transportation to farm/operation
5. Access to staff housing
6. Retaining existing staff
7. Limited budget to provide competitive wages and benefits
98. Other [interviewer type in] _____
99. Don't know/Prefer not to say [volunteered]

42. In the last year, did you employ any temporary foreign workers?
1. Yes
2. No
99. Don't know/Prefer not to say

43. [If Q42=2] Why didn't you hire a temporary foreign worker? [do not read list; accept up to 3 responses]
1. Didn't need additional workers/able to find Canadian workers.
2. Program costs
3. Difficulties providing required accommodations
4. Application process too confusing
5. Processing time of application too long or unpredictable
6. Program requirements too strict/demanding
7. Am not aware of the program
98. Other [interviewer type in] _____
99. Don't know/Prefer not to say

G. AAFC Initiatives

This section asks about Agriculture and Agri-Food Canada (AAFC) initiatives.

44. Have you seen, heard, or read anything about each of the following programs or initiatives? [randomize] [read list and check all that apply]

[do not read statements in brackets unless there is implied need to or respondent asks for clarification]

1. Sustainable Canadian Agricultural Partnership (a $3.5 billion five-year investment by governments to strengthen and grow Canada's agriculture and agri-food sector)
2. Agri Stability (provides support to manage large farming income declines.)
3. Agri Invest (helps manage risk and small farming income declines.)
4. Agri Insurance (provides cost-shared insurance for natural hazards.)
5. Agri Recovery (disaster relief framework, disaster event assessments, development of initiatives.)
6. Advance Payment Program (provides low-interest cash advances on the value of eligible agricultural products)

7. Dairy Direct Payment Program (Compensation for market access commitments made under recent international trade agreements.)
8. Local Food Infrastructure Fund (Funding to support community-based, not-for-profit organizations to improve their food systems through investments directly related to addressing food insecurities)
   Environmental [do not read]
9. Agricultural Clean Technology Program (Adoption or Research and Innovation Streams)
10. Agricultural Climate Solutions – (Living Labs Program or On-Farm Climate Action Fund) (Supports farmers in adopting beneficial management practices that store carbon and reduce greenhouse gases)
11. Agri Innovate Program (Provides repayable contributions to incent adoption of commercial-ready innovative technologies)
12. Food Waste Reduction Challenge (Supports innovations that accelerate and advance the deployment of diverse and high-impact solutions to food waste)

[Skip Q45 if unfamiliar with all programs in Q44]
45. Have you applied to any of the programs I just listed for funding or support?
1. Yes
2. No
99. Don't know/Prefer not to say

[If yes in Q45]
46. Which of the following did you apply to? [read any programs they answered "yes" to in Q44 except Q44-1]
[do not read statements in brackets unless there is implied need to or respondent asks for clarification]
1. Agri Stability
2. Agri Invest
3. Agri Insurance
4. Agri Recovery
5. Advance Payment Program
6. Dairy Direct Payment Program
7. Local Food Infrastructure Fund
   Environmental [Do not read]
8. Agricultural Clean Technology Program
9. Agricultural Climate Solutions
10. Agri Innovate Program
11. Food Waste Reduction Challenge

[If Q44-1 = "yes"]
47. What's your impression of the Sustainable Canadian Agricultural Partnership? [read list]

1. Very positive
2. Somewhat positive
3. Neither positive nor negative
4. Somewhat negative
5. Very negative
99. Don't know/prefer not to say [volunteered]

[If Q44-1 = "yes"]
48. How familiar are you with programming and services available under the Sustainable Canadian Agricultural Partnership? [read list]

1. Very familiar
2. Somewhat familiar
3. Slightly familiar
4. Not at all familiar
99. Don't know/prefer not to say [volunteered]

49. [If Q44-2 = "yes" and (Q45 = "no" or Q46-1="no"] Why have you not applied to Agri Stability? [DO not read list, multiple response]

1. Was not aware of the program
2. Program application process too complex
3. Program application process too costly
4. Program application too time consuming
5. Primary coverage under another program (for example, AgriInsurance)
6. Other [interviewer type in] _____
99. Don't know/Prefer not to say [volunteered]

H. Mental Health

50. Are you aware of any mental health support services or initiatives aimed specifically at Canadian farmers and their families?

1. Yes
2. No
99. Don't know/Prefer not to say

[If Q50=1]
51. In the last 12 months, have you accessed any such services or initiatives?

1. Yes
2. No
99. Don't know/Prefer not to say

[If Q51=1]

52. Which of the following services or initiatives, if any, did you access? [randomize and read list] [multiple response]

1. Mental health literacy training or workshops (for example, what is good mental health, how to recognize signs of stress and declining mental wellbeing)
2. Counselling (for example, by phone, in person)
3. Crisis line (for example, by phone, text, or online)
4. Peer support (for example, in person meetups, apps like TogetherAll/AgTalk)

98. Something else [always ask last] [specify]
99. Don't know/Prefer not to say [volunteered]

I. Demographics

Finally, these last few questions will help us analyse your responses.

53. Focusing now on net farm business income after operating expenses, during the last five years, has the net income of your operation…? [read]

1. Increased
2. Stayed the same
3. Decreased

99. Don't know/Prefer not to say [volunteered]

54. Does your household receive off-farm income? [read if necessary – For example, do either you or your partner have a job off the farm that supplements your income from agricultural production?]

1. Yes
2. No

99. Don't know/Prefer not to say [volunteered]

55. Is your farm organic certified or in the process of receiving organic certification?

1. Yes – organic certified
2. Yes – in process of obtaining organic certification
3. No / not certified organic

99. Don't Know/Prefer not to say

56. Agriculture and Agri-food Canada is committed to the ongoing collection of Gender Based Analysis Plus data to inform the design and delivery of policies and programs to better support sector participation for all. What is your gender identity? [ask open and record on list]

1. Man
2. Woman
3. Non-binary
4. Gender diverse
5. Two-Spirit
6. Intersex

7. Self-describe [interviewer type in] _____
99. Don't know/Prefer not to say

57. Do you consider yourself to be an Indigenous person, that is, First Nations (North American Indian), Métis or Inuk (Inuit)? [do not read list]

1. No, not an Indigenous person
2. Yes, First Nations (North American Indian)
3. Yes, Métis
4. Yes, Inuk (Inuit)
99. Don't know/Prefer not to say [volunteered]

58. A person in a racialized minority group in Canada is someone (other than an Indigenous person as asked above) who is non-Caucasian in race or non-white in colour, regardless of place of birth. Are you a member of a racialized minority group?

1. Yes
2. No
99. Don't know/Prefer not to say [volunteered]

[If "yes" in Q58]

59. What best describes your minority group(s)? [do not read list, multiple response]

1. Chinese
2. Black
3. Filipino
4. Arab
5. Latin American
6. Southeast Asian (for example, Vietnamese, Cambodian, Laotian, Thai)
7. South Asian (for example, East Indian, Pakistani, Sri Lankan)
8. West Asian (for example, Iranian, Afghan)
9. Korean
10. Japanese
98. Another group [interviewer type in] _____
99. Don't know/Prefer not to say

Thank you very much for your time and participation. The results of the research will be available to the general public, on the Library and Archives website, in the coming months.