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Canada 

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Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of qualitative research with producers across Canada.

In 2024, Canada's agriculture and agri-food system generated \$149.2 billion, representing about 7 per cent of Canada's gross domestic product (GDP), and provided 1 in 9 jobs in Canada. Canada's global exports of agriculture and agri-food in 2024 overall were \$92.2 billion in 2024, compared to \$91.6 billion in 2023.

Agriculture and Agri-Food Canada (AAFC) has been conducting the Strategic Issues Survey, a survey of producers, since 2007. This fiscal year marks the ninth wave of the survey. In 2010, a qualitative study was introduced, implemented every second wave, to help optimize the interpretive value of the data collected through the survey. This qualitative phase of research will allow AAFC to gain a rich understanding of issues presented in the quantitative phase of the research.

The research findings will be used in the development of policies, programs and initiatives, to improve communications, and to better serve clients. The results will provide critical insights on the opinions, issues and challenges facing agricultural producers in Canada. Through qualitative research AAFC will gain a deeper understanding of these issues and challenges and build off the quantitative phase of the research. The contract value for this project was \$179,961.99 including HST.

To meet these objectives, Earnscliffe was retained to conduct a comprehensive wave of qualitative research involving sixteen (16) focus groups with producers across the country. Producers were Canadian adults (18+) who are farmers and ranchers who hold or share primary responsibility for making decisions regarding their farm operations and who have \$10,000 or more in annual farm sales in 2025.

Our proposed approach ensured we were able to accommodate producers from different regions, producing a variety of commodities, and in different languages including two distinct groups with those who reside in official language minority communities (OLMCs). The groups were conducted as follows:

- 2 groups with producers in British Columbia
- 2 groups with producers in Alberta
- 2 groups with producers in Saskatchewan
- 2 groups with producers in Manitoba
- 2 groups with producers in Ontario
- 3 groups with producers in Quebec; 2 with producers in French and one with producers in English
- 2 groups with producers in Atlantic Canada
- 1 group with French-speaking producers outside Quebec

For each group we recruited eight (8) participants in order to achieve a desired minimum of six participants per group. The groups were up to ninety (90) minutes in length and participants received an honorarium in appreciation for their time. In total, 113 producers participated in the research.

For the purposes of this report, it is important to note that qualitative research is a form of scientific, social policy, and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and

opinions of a selected sample of participants on a defined topic at a particular point in time. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number.

The key findings of this research are presented below.

- Producers described Canada's agricultural and agri-food sector as operating in a complex environment shaped by multiple overlapping pressures, including rising input costs, land affordability challenges, labour shortages, regulatory requirements, market uncertainty, and increasingly unpredictable weather. Rising operating costs – such as fuel, fertilizer, feed, equipment, and borrowing – were most frequently identified as placing pressure on farm profitability and long-term planning.
- Land affordability and farm succession were also major concerns. Participants questioned how younger farmers will be able to purchase land or take over operations given high prices and growing competition from larger operations and non-agricultural buyers.
- Regulatory requirements were widely viewed as complex and administratively burdensome. Producers described reporting requirements, compliance processes, and program applications as time-consuming, while some also expressed concern Canadian regulatory standards may be more stringent than those in other jurisdictions, potentially affecting competitiveness.
- Participants noted that regulatory requirements can also affect sector infrastructure, including the viability of smaller local processing facilities. In some regions, the closure of local abattoirs was described as forcing producers to transport animals longer distances, increasing costs and raising concerns about animal welfare.
- Labour shortages were frequently raised, particularly in labour-intensive sectors. Producers described difficulty recruiting workers locally and highlighted challenges associated with the Temporary Foreign Worker Program, including housing requirements, costs and administrative processes.
- Producers widely acknowledged that international trade is essential to the sector, given Canada's reliance on export markets for many commodities. At the same time, global market volatility, tariffs, and geopolitical tensions were viewed as significant sources of uncertainty.
- Some participants referenced trade agreements such as Canada-United States-Mexico Agreement (CUSMA) and evolving trade relationships with China, emphasizing the importance of maintaining stable access to key international markets.
- Participants frequently emphasized the importance of maintaining strong and stable trade relationships while ensuring Canadian producers can compete on a level playing field internationally.
- While trade tensions were generally seen as a risk, some smaller or locally focused producers noted emerging opportunities including increased demand for domestically produced food products.

- Discussions also highlighted interest in facilitating interprovincial trade and retaining more value within Canada through increased domestic processing capacity, particularly where limited regional infrastructure restricts local marketing options.
- Adoption of digital agriculture technologies varied widely. Larger operations were more likely to report using tools such as precision agriculture systems, automated equipment, and digital monitoring tools, which were seen as improving efficiency, decision-making, and crop or livestock management.
- Producers expressed interest in emerging innovations such as robotics, automation, and advanced farm management tools, though affordability and infrastructure were seen as key factors shaping future adoption.
- Awareness of federal government programs, including those offered by AAFC, was relatively limited. While some participants were able to name specific programs (such as AgriStability, AgriInvest, and the Youth Employment and Skills Program), many were unaware that these programs were delivered by AAFC. Participants often reported learning about available supports indirectly through industry associations, commodity organizations, their agronomist, sector media, or peer networks, rather than directly through federal government communications.
- Unaided awareness of the Sustainable Canadian Agricultural Partnership and the work underway to develop the Next Policy Framework (NPF) was limited.
- When asked about priorities for the NPF, producers frequently reiterated the roles they believe the federal government should play in supporting the sector. When presented with potential themes – including markets and trade, growth and competitiveness, science and innovation, climate change and resiliency, and environmental sustainability – all were viewed as important.
- Among producers who had accessed federal programs, funding was generally viewed as helpful for supporting investments in infrastructure, innovation, and technology adoption.
- At the same time, application processes were frequently described as complex and time-consuming, with shorter application windows and administrative requirements creating barriers, particularly for smaller operations.
- Some producers also questioned whether program eligibility criteria always reflected the realities of diverse farm operations, noting that certain programs may be better suited to larger or more specialized farms than smaller mixed-operations.
- Producers rely on a mix of industry associations, their agronomist, farm media, peer networks, and social media platforms to stay informed about developments affecting the agricultural and agri-food sector.

- Social media platforms such as Facebook and YouTube are widely used to follow sector updates, participate in producer groups, and watch practical farming content. Some producers also use social media to promote their farms or market products directly to consumers.
- In testing draft communications concepts, participants responded most positively to approaches that felt credible, familiar, and aligned with how information is typically shared within the agricultural and agri-food community.
- Concepts resembling sector-style communications, including visuals featuring real farmers and testimonials, were viewed as particularly authentic and engaging.
- Traditional government-style messaging was also well received when it clearly communicated practical information such as financing, investment protection, or support for farm operations.
- Attention-grabbing visuals and AI-generated imagery produced more mixed reactions. While some participants felt these approaches could attract attention online, others questioned their appropriateness for government communications.
- Humour-based or lighthearted and trending concepts were generally viewed as least effective, with many participants indicating that communications related to farming operations or financial challenges should maintain a more direct and professional tone.

Contract details and political neutrality certificate

Research firm: Earnscliffe Strategy Group (Earnscliffe)

Contract number: CW2425937

Contract value: \$179,961.99

Award date: October 27, 2025

I hereby certify as a representative of Earnscliffe Strategy Group 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 6, 2026



Stephanie Constable
Principal, Earnscliffe

Introduction

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of qualitative research with producers across Canada.

In 2024, Canada's agriculture and agri-food system generated \$149.2 billion, representing about 7 per cent of Canada's gross domestic product (GDP), and provided 1 in 9 jobs in Canada. Canada's global exports of agriculture and agri-food in 2024 overall were \$92.2 billion in 2024, compared to \$91.6 billion in 2023.

Agriculture and Agri-Food Canada (AAFC) has been conducting the Strategic Issues Survey, a survey of producers, since 2007. This fiscal year marks the ninth wave of the survey. In 2010, a qualitative study was introduced, implemented every second wave, to help optimize the interpretive value of the data collected through the survey. This qualitative phase of research will allow AAFC to gain a rich understanding of issues presented in the quantitative phase of the research.

The research findings will be used in the development of policies, programs and initiatives, to improve communications, and to better serve clients. The results will provide critical insights on the opinions, issues and challenges facing agricultural producers in Canada. Through qualitative research AAFC will gain a deeper understanding of these issues and challenges and build off the quantitative phase of the research.

The specific objectives of the research were to:

- Understand Canadian producers' attitudes and opinions in relation to the agricultural sector;
- Determine Canadian producers' awareness of AAFC's agricultural programs and initiatives;
- Identify emerging issues in agriculture; and impacts on trade.

Research approach

To meet these objectives, Earnscliffe was retained to conduct a comprehensive wave of qualitative research involving sixteen (16) focus groups with producers across the country. Producers were Canadian adults (18+) who are farmers and ranchers who hold or share primary responsibility for making decisions regarding their farm operations and who have \$10,000 or more in annual farm sales in 2025.

Our proposed approach ensured we were able to accommodate producers from different regions, producing a variety of commodities, and in different languages including two distinct groups with those who reside in official language minority communities (OLMCs). The groups were conducted as follows:

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- 1 group with French-speaking producers outside Quebec

For each group we recruited eight (8) participants in order to achieve a desired minimum of six participants per group. The groups were up to ninety (90) minutes in length and participants received an honorarium of \$300.00 as a token of appreciation for their time. In total, 113 producers participated in the research.

Except where specifically identified, the qualitative findings represent the combined results across the various audiences and for both English and French. Quotations used throughout the report were selected to bring the analysis to life and provide unique verbatim commentary from participants across the various audiences.

For the purposes of this report, it is important to note that qualitative research is a form of scientific, social policy, and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic at a particular point in time. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number.

Appended to this report are the details about the focus group design, methodology, and analysis as well as the recruitment screener, discussion guide, and concepts presented to participants during the groups.

Detailed findings

This report is divided into six main sections: context and understanding; international trade; regulatory burden/red tape reduction; digital agriculture, awareness of AAFC programs; and digital communications and social media.

Section A: Context and understanding

The focus groups began with a broad discussion to understand producers' current operating environment through two questions: the most important issues facing the sector, and their views on the appropriate role of the federal government. These early conversations helped establish important context for the discussions that followed, providing insight into producers' most pressing concerns and the factors shaping their perspectives on the topics explored throughout the remainder of the sessions. While some issues raised during this initial discussion reflected regional differences in market conditions or operating environments, many of the perspectives explored later in this report varied more noticeably by farm size, commodity type, or business model.

Most important issue facing the sector

When asked, unaided, to identify the most important issue facing Canada's agricultural and agri-food sector today, participants rarely pointed to a single challenge. Instead, discussions reflected a combination of intersecting and compounding pressures.

Across groups, several issues were raised repeatedly and unprompted. Others surfaced regularly but less consistently, and a smaller number emerged in select discussions. The table below summarizes how these themes appeared across the focus groups.

Exhibit A1: Distribution of unaided responses. What is the most important issue facing Canada's agricultural and agri-food sector today?

Most frequent mentions	Common mentions	Mentioned less frequently, but notable
Cost pressures and financial viability (rising input costs, narrow margins)	Labour availability and workforce sustainability (labour shortages and wage pressures)	Public perception and understanding of agriculture (lack of awareness/knowledge of farming realities)
Land affordability and farm continuity (including succession, consolidation, expansion barriers)	Trade uncertainty and access to export markets (tariffs, sudden market changes)	Concerns about environmental expectations and stewardship responsibilities
Regulatory burden and program requirements (time, paperwork, and compliance requirements)	Weather extremes (climate change) and unpredictable growing conditions	Limited domestic processing and keeping more value in Canada

The most frequently mentioned issue was the rising cost of operating a farm. Participants pointed to rising input costs (fuel, fertilizer, feed, equipment) as well as borrowing costs. Many described margins as

tightening and noted that when commodity prices increase, input costs often rise as well. Rather than viewing this as temporary, producers often described it as an ongoing squeeze that makes planning, reinvestment, and long-term decision-making more difficult. This theme was consistent across regions and commodities.

“Stopping non-farming investors from driving up farmland prices through speculative purchases.” – Ontario

Land prices also featured prominently in discussions about the long-term sustainability of farm operations. Producers frequently raised concerns about high land prices and what that means for the future of farming more broadly. In several groups, participants questioned how younger farmers can afford to buy land or take over existing operations without taking on significant debt. Others described competition from larger operations, corporate buyers, or development pressures driving up prices. While this issue was particularly acute among producers in British Columbia, Prairie participants more often framed it in terms of consolidation and scale, with larger operations better positioned to compete for available land.

“Consolidation of market power in the agribusiness sector.” – Manitoba

“I am an aging farmer, and I don’t have family to take over. How do I pass on a farm when land is so expensive?” – British Columbia

“I think the government should focus on young farmer entrants, including keeping our farm kids on the farm.” – Ontario

Regulatory requirements were also widely mentioned. Producers described the time and paperwork required to meet rules, reporting obligations, and program eligibility requirements as burdensome. For smaller operations in particular, administrative demands were often described as disproportionate relative to available staff capacity. Some participants suggested that compliance obligations can limit their ability to respond quickly to market opportunities or expand their operations. In several groups, participants also pointed to the impact of regulatory requirements on local processing capacity, noting that some small abattoirs have closed or become more difficult to operate under current rules. This, in turn, was seen as limiting options for producers and, in some cases, influencing decisions to move away from certain commodities such as beef. Some participants also noted that when local processing facilities close or become less accessible, producers may need to transport animals longer distances to reach available abattoirs. This was described as increasing transportation costs and environmental impacts, while also raising concerns related to animal welfare and the time and cost required to manage longer travel distances. These impacts were often described as being felt most acutely by smaller or regionally focused operations that rely on local processing infrastructure.

« Voyons bureaucratie, paperasses, et exigences. Nous on était en production laitière il y a dix ans. On a décidé d’abandonner, parce que c’était toujours des demandes de plus en plus, et changer ci, changer ça. Des choses qui étaient déjà en place et des coûts qui ne cessent jamais d’augmenter là pour tout mettre aux normes. Encore des normes, toujours de plus en plus. Des fois que tu dis que c’est un peu ridicule. T’sais rajouter des affaires qui n’avaient pas de bon sens. » / “Let’s talk about bureaucracy, paperwork, and requirements. We were in dairy production ten years ago. We decided to give it up because there were always more and more demands, and change this, change that. Things that were already in place and costs that never stopped increasing to bring everything up

to standard. Always more and more standards. Sometimes you say it's a bit ridiculous, you know. Adding things that didn't make sense." – Quebec (French)

Alongside these regulatory pressures, labour shortages were also commonly raised, as both a cost issue and an availability issue. This concern was especially pronounced among producers who rely on seasonal, manual, or livestock-related labour, where staffing needs can be ongoing or difficult to fill locally. Participants described difficulty finding reliable workers and balancing wages with what their operations can afford. Several producers also spoke about their reliance on temporary foreign workers and the challenges associated with the program, including housing requirements, the cost of bringing workers to Canada, and application and approval processes tied to recruitment and approvals. Smaller and more diversified farms were somewhat more likely to frame labour as an immediate operational challenge affecting day-to-day operations.

Beyond these operational challenges, many participants pointed to external pressures, particularly related to trade and market access. These issues were discussed most prominently in Prairie provinces and among export-oriented producers. Participants referenced tariffs, shifting international relationships, and sudden market closures. These concerns were most acutely felt by grain and cattle producers. Some also expressed frustration that agriculture can be affected by broader political decisions outside the sector's control, with several participants suggesting that other sectors (such as automotive) are prioritized in trade negotiations.

"It seems that international trade issues would be the most important on the grand scheme. Equipment costs, price variability, and local market processing capacity is the biggest challenge for us." – Atlantic Canada

Weather-related challenges were also mentioned across multiple groups. Drought, flooding, and unpredictable growing conditions were described as adding risk to already tight operating margins. These discussions were typically practical and operational in tone, focused on day-to-day impacts rather than broader climate policy debates. For many producers, these weather-related risks were discussed as part of the broader pressures affecting long-term planning and sustainability.

Less frequently, participants raised concerns about how agriculture is viewed by the public, the need for stronger domestic processing capacity to retain more value in Canada, or the expectations placed on farmers regarding environmental stewardship. As noted above, some participants linked the loss of smaller processing facilities, including local abattoirs, to the regulatory environment, suggesting this has reduced options for producers in certain regions. While these themes did not dominate discussions, they contribute to the broader picture of how producers view the sector's long-term sustainability.

"There is a lack of understanding of farming in the general population." – Alberta

These issues also shaped participants' views on the role they believe the federal government should play in supporting the sector.

Role of the federal government

Participants were also asked, unaided, how they believe the Government of Canada can best support the agricultural and agri-food sector. As with the previous question, responses did not centre on a single

expectation. Rather, producers described a range of areas where federal policy, programs, and regulatory approaches can influence the sector's long-term viability.

Broadly speaking, participants emphasized the importance of policies that support and enable the sector's competitiveness rather than constrain it. This included financial supports, maintaining a level playing field internationally, expanding market access both domestically and abroad, promoting Canadian agricultural products, supporting new entrants and farm succession, maintaining insurance and risk-management programs, investing in research and development, supporting technology adoption, and reducing regulatory and administrative burden.

"One thing the government could do on this aspect, is to encourage the consumers to shop local. It's a growing trend, it's a big thing, but that's how I feel we'll have the strongest economy. If people are encouraged to shop locally, support local farmers, find people they can trust, and then that will, from the bottom-up support the sector." – Ontario

Across groups, several priorities emerged, most notably reducing regulatory burden, supporting trade and market access, and ensuring programs are practical and accessible. Other suggestions focused on strengthening domestic processing capacity, improving labour programs, supporting farm succession and new entrants, and increasing public understanding of agriculture. Perhaps not surprisingly, these suggestions largely reflect the same challenges participants identified earlier as the most pressing issues facing the sector.

The table below summarizes how these themes appeared across the focus groups.

Exhibit A2: Distribution of unaided responses. What role should the Government of Canada play in supporting the agricultural and agri-food sector?

Most frequent mentions	Common mentions	Mentioned less frequently, but notable
Reducing regulatory burden and simplifying rules	Improving labour programs and access to workers	Increasing public awareness of agriculture
Supporting stable trade relationships and market access (domestic and international)	Supporting domestic processing capacity	Supporting innovation and technology adoption, including maintaining agricultural research capacity
Ensuring programs are practical, accessible, and responsive to producers	Supporting farm succession and new entrants, including encouraging interest in agriculture among younger generations	Supporting environmental stewardship and climate resilience initiatives

Reducing regulatory burden was one of the most frequently raised expectations of government. Participants across several groups suggested that simplifying rules, reducing paperwork, and improving how regulations are implemented could make it easier for producers to operate and grow their businesses. Some participants emphasized the need for regulations that are practical and aligned with on-the-ground realities of farming operations.

« Moins de bureaucratie, de paperasse, et d'exigences qui ne cesses de restreindre les agriculteurs. » / "Less bureaucracy, paperwork, and requirements that keep restricting farmers." – Quebec (French)

Trade and market access were also commonly identified as an important federal responsibility. Producers – particularly those in export-oriented sectors such as grain and beef – viewed the federal government as playing a key role in negotiating trade agreements and maintaining stable international relationships. Participants suggested maintaining reliable export markets is critical for the sector's long-term stability. At the same time, some participants also highlighted the importance of improving domestic market access, noting that reducing interprovincial trade barriers could help expand opportunities to sell agricultural products across Canada.

Labour programs, particularly those related to temporary foreign workers, were also discussed in the context of the federal government's role. Participants emphasized the importance of reliable access to labour and suggested improvements to program timelines, application and approval processes, and housing requirements could help address ongoing workforce challenges. These concerns were particularly pronounced among producers in labour-intensive sectors that rely on seasonal or year-round hired workers.

"Reduce the bureaucracy in the temporary foreign worker programs. It's hard enough... it's almost impossible to bring kids out of the city to work on the farm or out of your local town anymore, so many farms are relying on temporary foreign workers." – Quebec (English)

Some participants also suggested the federal government could play a stronger role in supporting domestic processing capacity. In particular, the loss of smaller processing facilities was raised in several discussions as limiting options for producers in certain regions.

Participants also highlighted the importance of supporting farm success and encouraging new entrants into agriculture. Some suggested improving awareness of farming as a viable career path among younger Canadians could help support the long-term sustainability of the sector.

Less frequently, participants suggested government could help improve public understanding of agriculture and the realities of modern farming. Others mentioned support for innovation and technology adoption, environmental stewardship and climate resilience initiatives, and the importance of maintaining agricultural capacity. In a few discussions, participants also expressed concern about the closure of agricultural research centres, noting that these facilities have historically played an important role in developing regionally relevant knowledge and innovations for producers. Some felt the loss of these centres limits opportunities for research, innovation, and knowledge sharing within the sector.

"The federal government should fund and operate agriculture research stations across the country, because the center focuses on crop improvement, soil science, climate adaptation, and production technology." – British Columbia

Taken together, these discussions highlight the complex set of operational, market, and policy pressures producers are navigating, as well as their expectations for how federal policies and programs can support the sector's long-term stability and competitiveness.

Section B: International trade

Following the initial unaided discussion, participants explored several of the topics raised earlier in greater depth, including international trade and its role in Canada's agricultural and agri-food sector.

Across groups, participants widely recognized the importance of export markets, noting that Canada produces far more agricultural products than can be consumed domestically. As a result, many described access to international markets as essential to maintaining stable demand, supporting commodity prices, and sustaining the long-term viability of the sector. This perspective was particularly evident among producers in export-oriented sectors such as grain, oilseeds, and beef, who noted that global demand plays a significant role in shaping market opportunities.

At the same time, while international trade was broadly viewed as essential, many participants also described it as a source of uncertainty. Producers referenced tariffs, shifting international relationships, and sudden market disruptions as examples of factors that can affect agricultural exports. Several participants observed that trade decisions are often influenced by broader geopolitical considerations that extend beyond agriculture, leaving producers feeling that the sector can be vulnerable to policy decisions made outside of their control. As noted earlier, some participants also expressed the view that agriculture is sometimes used as a bargaining tool in trade negotiations or receives less attention than other sectors, such as automotive.

"I know the squeaky wheel gets the grease, but I don't want to ever hear how government has traded off agriculture, and the importance of our sector to the economy of Canada, in favour of a lesser sector that just happened to scream a little louder. The agriculture community across Canada is immense, and I don't want to see where we're trying to protect one little part of an automobile sector in some other place just because they yelled louder." – Quebec (English)

"China quit buying canola, and that's a big one for us. If they quit, then... the markets just go down." – Saskatchewan

Some participants referenced specific trade agreements and negotiations in this context, including the Canada-United States-Mexico Agreement (CUSMA) and evolving trade relations with China. While these topics were not raised consistently across groups, a few producers – particularly those involved in export-oriented commodities – emphasized the importance of maintaining stable access to these key markets. Some participants expressed concern about the potential impact of trade tensions or changing market conditions, while others emphasized the need for Canada to continue strengthening trade relationships with major international partners.

"We're in a global economy. All countries are going to succeed when we can trade fairly and honestly with each other. So, if one country is going to take advantage of another country, that's going to work for a certain period of time before the other country realizes and throws their hands up and says, 'Okay no, this deal doesn't work for us.'" – Alberta

Despite these concerns, however, some participants also pointed to opportunities emerging from recent geopolitical tensions and shifts in global markets. A few suggested that changing trade dynamics – particularly tensions involving the United States – have created opportunities for Canadian producers,

including increased demand for domestically produced products. This perspective was more commonly raised among smaller, more locally focused producers.

In several discussions, participants also raised the issue of trade barriers within Canada. Some suggested that reducing interprovincial trade restrictions could help create additional opportunities for producers to access domestic markets and expand sales across the country. Participants noted that improving the flow of agricultural products between provinces could support market diversification and help strengthen domestic supply chains and food self-sufficiency.

“Domestic has been the only way I’ve been able to still get by; having to sell locally instead of internationally. It’s a lot more work to go from plant to plant marketing, but it’s what we have to do right now to get by.” – Saskatchewan

Many participants emphasized the importance of maintaining strong and stable international trade relationships. Some suggested Canada should continue to pursue new trade agreements and strengthen existing partnerships in order to maintain reliable access to global markets. At the same time, producers highlighted the need to ensure Canadian farmers are able to compete on a level playing field internationally, particularly where differences in regulatory requirements, production standards, or government supports may affect competitiveness.

In addition to discussions about export markets, some participants pointed to opportunities to retain more value within Canada through increased domestic processing capacity. Participants suggested expanding processing infrastructure could help ensure more value-added activities occur within Canada before agricultural products enter international markets. These comments also echoed concerns raised earlier about the loss of smaller processing facilities in some regions and the broader implications this may have for producers’ operations and marketing options.

Section C: Regulatory burden/Red tape reduction

Building on earlier discussions about the challenges facing the sector, participants were asked to share their perspectives on regulatory burden and opportunities for reducing red tape in agriculture.

Across groups, many producers described the overall regulatory environment as complex and difficult to navigate, noting that a wide range of rules and requirements affect different aspects of their operations and can have implications for how Canadian producers compete both domestically and internationally.

“I understand the regulations. I know why they're there, but when we have so few processors in a region, the regulations are put in place with no real understanding of the mechanics.” – Atlantic Canada

In addition to the complexity of regulations, some participants also raised concerns about how Canadian requirements compare with those in other countries. Some producers suggested Canadian farmers are often required to meet higher regulatory or production standards, which they felt can make it more difficult to compete with imported products or producers operating in jurisdictions with fewer requirements. While participants generally recognized the importance of maintaining high standards for food safety and environmental protection, some questioned whether differences in regulatory expectations may create an uneven playing field for Canadian producers.

“The U.S. their standards are so low, it's unreal. And here, we're expected to jump through the hoop to get our... our pigs there. Why are we... why do we have to jump through the hoop and they don't?” - Saskatchewan

« Plus de normes, plus sévères, plus des frais minimums à payer, fait que je me retrouve que mettons ma boîte exemple que je la vends à 44 \$, les États-Unis vont arriver, puis vont la vendre à 30 \$. Puis eux autres, ils n'auront pas de problème à arriver là, donc ça, c'est sans compter toutes les certifications qu'on doit avoir pour pouvoir fonctionner au Québec. » / “There are more regulations, stricter rules, and minimum fees to pay. For example, I might sell a box for \$44, while producers from the United States can come in and sell it for \$30 without difficulty. And that doesn't even include all the certifications required for us to operate in Quebec.” – Quebec (French)

Participants also highlighted the complexity of navigating regulatory requirements across different levels of government. In several discussions, producers pointed to situations where federal, provincial, and sometimes municipal rules intersect, creating confusion or duplication in regulatory processes. Some participants suggested differing requirements across jurisdictions can make it difficult to clearly understand which rules apply or how compliance should be achieved.

Many producers described regulatory processes as complex and time-consuming, noting that completing paperwork, meeting compliance requirements, and navigating program applications can require substantial administrative effort. For some, these demands were seen as diverting time and resources away from core farming activities. Smaller operations in particular noted that administrative requirements can be difficult to manage without dedicated staff, making compliance more challenging. Several larger producers acknowledged this, noting that their operations often employ staff responsible for managing regulatory and administrative requirements.

“The regulations don't accommodate for scale, and so it's very one-size-fits-all. That's been a little bit frustrating. And then indirectly through our involvement with the local abattoir, we've seen nothing but price increases because they're getting red tape thrown at them every which way.” – Manitoba

In some cases, producers suggested regulatory requirements can influence operational decisions, including investments, expansion plans, or changes in production practices. As noted earlier in the discussions, some participants also linked regulatory pressures to broader structural challenges within the sector, including the loss of smaller processing facilities in certain regions and the implications this may have for producers' operations.

Overall, many producers expressed the view that government should allow producers greater flexibility to manage their operations. Participants emphasized that farming is both their livelihood and long-term responsibility, noting that farmers are strongly motivated to maintain the sustainability and viability of their land and operations for future generations. In this context, some felt reducing regulatory burden and allowing producers greater discretion in how they meet requirements could help support the sector's long-term success.

Section D: Digital agriculture

The focus group discussions also explored digital agriculture and the role technology may play in the future of farming in Canada.

In discussing this topic, participants demonstrated varying levels of familiarity with and adoption of digital technologies. While some producers described using a range of tools such as precision agriculture technologies, GPS-guided equipment, drones, and digital systems to monitor crops or livestock, others indicated they had adopted few digital tools or had not incorporated significant technology into their operations. In most groups, a number of participants – often those operating smaller farms – were largely observers in these conversations, noting that digital agriculture was not yet a major part of their day-to-day operations beyond point-of-sale systems or occasionally web store platforms.

Among those using digital technologies, many described these tools as increasingly important for improving efficiency and productivity on farms. Some producers noted that technology can help support more precise use of inputs such as fertilizer, water, or crop protection products, while others pointed to benefits such as improved record-keeping, better monitoring of field conditions, and the ability to make more informed operational decisions. Livestock producers also described using technologies such as automated feeding systems, cameras to monitor animals, and mobile applications used to track and monitor livestock health and feeding conditions. In this sense, digital agriculture was often viewed as part of the ongoing modernization of farming practices.

“We also incorporated sensors in our bins. It keeps track of our grain, and, especially for canola, to reduce any spoilage that might occur. So, these are all things that we felt were necessary additions to our operation and it's made us more efficient.” – Manitoba

When asked about emerging technologies and innovations that they are watching with interest, producers mentioned developments in robotics and automation, advanced tools designed to support farm management and decision-making, the automation of labour-intensive tasks, and technologies that provide more real-time insights into crop and livestock conditions. These innovations were often discussed as potential tools to help farms operate more efficiently in the future.

“We’re pretty low tech. There is data collection technology that we would like to be using, but we’re held back by the investment cost at the moment.” – Atlantic Canada

“We have a lot of rocky land and have not used it yet, but we are looking into AI rock locating companies. You can pick rocks off with GPS instead of aimlessly covering three times the ground to locate rocks manually.” – Saskatchewan

At the same time, participants emphasized that adopting new technologies can involve significant costs and operational adjustments. Some producers described digital tools and equipment as expensive investments that may be difficult to justify, particularly for smaller operations or farms with tighter margins. Others noted the pace of technological change can make it challenging to keep up with new systems or determine which technologies are most appropriate for their operations.

Connectivity was also raised as an important consideration. Several participants noted limited or unreliable internet access in rural areas can restrict their ability to fully utilize digital technologies or data-driven tools.

Section E: Awareness of AAFC programs

The discussions also explored participants' awareness of government programs and services, including those offered by AAFC, as well as their experiences accessing supports available to the agricultural sector.

Overall, awareness of government programs and services was limited. Many participants struggled to identify specific programs. When programs were mentioned, they often referred to provincial government programs or services offered by industry associations. In some cases, participants named AAFC programs, such as AgriStability, AgrilInvest or the Youth Employment and Skills Program, but were unaware that these programs were delivered by the federal government.

"I guess we probably use AgrilInsurance. I did not realize it was run by AAFC." – Alberta

These discussions suggest while many producers are generally aware government supports exist for the agricultural sector, fewer are able to identify specific federal programs or describe how they operate. Participants noted they often learn about available programs through industry associations, commodity organizations, agronomists, producer networks, and for some, through actuaries rather than directly from government sources.

When provided with the names and examples of specific AAFC programs during the discussions, recognition among participants appeared to increase.

Some participants indicated they had applied for or accessed AAFC programs in the past, particularly those related to insurance, innovation, infrastructure, or sector development. For those with experience using these programs, funding was often viewed as helpful in supporting investments that might otherwise be difficult to undertake, such as adopting new technologies, improving infrastructure, or expanding operations.

"AgrilInvest is awesome! We use it." – Alberta

"AgrilInvest is good; easy." – Ontario

At the same time, a number of participants described challenges associated with accessing AAFC programs. Application processes were often described as complex and time-consuming, and some producers felt the administrative requirements associated with applying for funding could discourage participation. As noted earlier, smaller operations in particular were more likely to describe difficulties navigating application processes or meeting program requirements.

Participants also raised concerns about program timelines and the availability of funding. Some noted the application windows can be relatively short, making it difficult to prepare and submit applications in time. Others suggested available funding can be exhausted quickly, which may favour producers who are able to prepare applications quickly or who have greater administrative capacity. In a few groups, producers noted that AgrilInsurance does not work well for farms with diversified crops because it is crop-specific.

Next Policy Framework

Unaided awareness of the Sustainable Canadian Agricultural Partnership was limited, and at most a handful of participants in each group were familiar with the work underway to develop the next five-year policy framework for the sector, currently referred to as the Next policy Framework (NPF).

When introduced to the concept and asked unaided what the next framework should focus on, participants frequently reiterated the roles they believe the federal government should play in supporting the sector. When presented with potential themes – including markets and trade, growth and competitiveness, science and innovation, climate change and resiliency, and environmental sustainability – participants generally viewed all of these areas as important, though discussions most often centred on market competitiveness, environmental pressures, and the overall viability of farm operations. Across discussions, many participants emphasized that financial sustainability underpins the sector’s ability to adapt, invest, and attract future generations.

Participants most frequently highlighted the importance of ensuring that the framework continues to support growth, competitiveness, and market access for Canadian agriculture. Producers in several groups stressed the importance of maintaining strong domestic and international markets and ensuring that Canadian producers remain competitive in the face of evolving trade relationships and global market conditions. In some discussions, participants also pointed to the need to reduce interprovincial barriers to improve access to domestic markets and strengthen national supply chains. Others emphasized the importance of strengthening domestic processing capacity and food systems to retain more value within Canada and improve food sovereignty.

Environmental sustainability and climate resiliency were also key areas of focus. Many participants emphasized the importance of maintaining a strong focus on environmental sustainability and climate resiliency, noting that producers are increasingly experiencing the impacts of unpredictable weather patterns, including drought, flooding, and other environmental extremes. In this context, some participants expressed interest in programs that support on-farm solutions, such as agroforestry (including planting trees or shelterbelts), improved irrigation or water-management systems, soil health initiatives, and other practices intended to strengthen resilience and support long-term environmental stewardship.

“I think agroforestry programs and encouraging the planting of trees in agricultural systems in all different facets is a beneficial thing. And if they're concerned about climate change or anything, trees are great.” – Ontario

“They need to focus on the environment and helping farmers transition to greener practices.” – Ontario

Participants also spoke about the importance of continued investment in science, innovation, and practical supports. These discussions often positioned innovation as a means of improving both operational efficiency and environmental resilience, including through the use of digital tools and automation. Some participants also emphasized the importance of maintaining strong agricultural research capacity and ensuring that innovations are practical, accessible, and applicable across different types of operations.

“The one thing the federal government did, and it really disappointed me, was cutting research funding to the experimental farms and research stations. They should never do

that. There's such a return for their investment in research. They should never be cutting them, if anything, they should be increasing it." – Quebec (English)

Finally, participants highlighted the importance of program design and accessibility, particularly in supporting the long-term viability of the sector. In several groups, participants emphasized the need for programs that are accessible to smaller or diversified farms and that support new entrants and farm succession. Others noted the importance of ensuring that policies and programs help make farming a viable and attractive livelihood for future generations. These discussions often reinforced the view that improving the economic sustainability of existing farms is a necessary condition for attracting new entrants to the sector, and that program design should better reflect the operational realities of different farm types while minimizing administrative burden. Some participants also noted the importance of improving public awareness and understanding of agriculture to help position farming as a more visible and viable career path.

"If you don't support the existing farmers and make it sustainable for them to operate, there is zero chance that someone new is going to look at the world today and reasonably say, I'd like to get into farming." – Atlantic Canada

"We need to focus on young farmer entrants and keeping kids on farms. Farming is not a trade here. You should be able to go to trade school to learn farming." – Ontario

Section F: Digital communications and social media

Before delving into feedback on proposed social media concepts, the focus groups explored the sources producers rely on most frequently for information about their operations.

Sources of information and use of social media

Across groups, producers described relying on a range of information sources to stay informed about developments affecting the agricultural sector. Industry associations and commodity organizations were among the most commonly mentioned, often serving as trusted intermediaries for sector news, policy updates, and program information. Many producers also noted that they regularly rely on their agronomists or crop advisors for information and guidance related to farming practices, emerging issues in the sector, and new products or technologies. Farm media and email newsletters distributed by sector organizations were also frequently cited as ways producers learn about government programs, regulatory changes, and other developments affecting the sector.

Peer networks were another important source of information. Many participants noted that conversations with other farmers, neighbours, or local producer groups play an important role in shaping practical knowledge and staying informed about emerging issues.

"I would say most of our information comes through just connecting with people. Just kind of look around, and if you're not already part of a group, join it, because there's so much to be learned just from others." – Saskatchewan

Social media also forms part of the information environment for many producers. Platforms such as Facebook and YouTube were most commonly mentioned, particularly for participating in producer

groups, following industry updates, and viewing practical farming content. Several participants noted they follow farm influencers or well-known producers who share insights, experiences, and commentary related to farming practices and sector developments. While social media was not always seen as a primary source of official information, many participants indicated it can help surface issues or discussions they later explore through other channels.

“I mainly use Facebook. Farming in the Maritimes is probably the biggest group that I access for information about farming and whatnot, and networking.” – Atlantic Canada

“Social media is valuable for reaching customers. We use MailChimp, we have a farm website, and we’re on Instagram and Facebook.” – British Columbia

Some producers also described using social media as part of their own operations, particularly to promote their farms, products, or direct-to-consumer sales. In these cases, platforms such as Facebook or Instagram were used to share updates, market products, and connect with customers or local communities. This was more commonly mentioned among smaller or more diversified operations that sell directly to consumers.

By contrast, relatively few participants indicated they actively follow AAFC through social media or other channels. A small number recalled visiting the department’s website when looking for specific information about programs or policies, though several described the experience as typical of government websites and sometimes difficult to navigate. As a result, many participants suggested they are more likely to encounter information related to government programs indirectly through industry organizations, sector media, or peer networks rather than through AAFC channels directly.

“I would love to see it [the website] maybe more simplified or, broken into sections, where if you are a small producer, and you don't have a hired employee looking for grants or looking for your information for you, that maybe some of the general, beginner-type, information was a little easier to navigate.” – Ontario

Reactions to digital communication approaches

Participants were shown a series of draft social media concepts developed by AAFC to explore how different communication approaches might capture producers’ attention online. In most groups, a random selection of four concepts was shown, representing six communication approaches: traditional; similar to sector; attention-grabbing; AI-generated; humour; and lighthearted and trending. In total, eleven concepts were tested across the sixteen groups. After the second day of groups (eight groups), a lighthearted and trending concept was introduced in place of Traditional A, resulting in fewer showings of both concepts. The order of presentation for each group is provided in the Appendix.

Across concepts, participants’ initial reactions were often shaped by quick assessments of relevance, tone, and clarity. Many indicated that they first looked for cues that the content was directly applicable to their operations or circumstances, with messaging related to financial support, risk management, or farm viability most likely to capture attention. While visuals could help draw the eye, participants generally indicated they would likely engage further if the message felt credible and relevant. Participants also reacted quickly to tone and presentation, with concepts that appeared overly complex, text-heavy, or inconsistent with expectations of government communications more likely to be dismissed

at a glance by some. By contrast, visuals featuring real farmers or familiar farm settings were more likely to create an immediate sense of relevance and trust.

Asked which concept would most effectively capture their attention, while reactions varied somewhat across groups, participants responded most positively to approaches that felt familiar, credible, and directly relevant to their experiences as producers. In particular, concepts that clearly communicated practical support or addressed current financial pressures were more likely to capture attention than those relying primarily on visual novelty or humour; though these did appeal to younger participants. As illustrated in the table below, more traditional government-style communications and concepts similar to those used by sector organizations resonated most strongly, while more experimental approaches such as humour or lighthearted and trending concepts were viewed less favourably.

Exhibit F1: Distribution of responses. Which approach would be most effective in getting your attention?

Concept	Total*
Traditional – B (shown in 6 groups)	21
Traditional – A (shown in 3 groups)	6
Similar to sector – B (shown in 6 groups)	18
Similar to sector – A (shown in 7 groups)	15
AI-generated – A (shown in 8 groups)	10
AI-generated – B (shown in 6 groups)	7
Attention-grabbing – B (shown in 7 groups)	9
Attention-grabbing – A (shown in 6 groups)	5
Humour – A (shown in 6 groups)	8
Humour – B (shown in 7 groups)	6
Lighthearted and trending – A (shown in 4 groups)	3

**Across the 16 focus groups, 5 responses were not recorded.*

“Similar to sector” approaches were described as familiar, credible, and aligned with how information is typically shared within the agricultural community. Participants responded positively to visuals featuring real farmers and farm settings, noting that seeing other producers made the concepts feel more authentic and relevant. Some indicated that testimonials or examples of how other farmers are managing challenges would capture their attention, as they often value learning from the experiences of other producers. These approaches were often seen as more trustworthy and reflective of “real” farming experiences, which increased the likelihood that participants would stop and engage with the content. One exception was the post with the family who introduced solar panels on their farm, which many participants felt was too wordy, suggesting that while authenticity is important, overly detailed or text-heavy executions may reduce engagement.

“It [Similar to sector A] was a little bit more serious. The ones that had the animals, you know, crazy chicken [AI-generated A] and the animals at the poker table [Humour B], they kind of catch your eye because they're cute and funny, but this is a serious topic.” – Atlantic Canada

Traditional government-style approaches were also viewed positively. While participants acknowledged the visuals in these concepts were not always the most attention-grabbing, the messaging itself

resonated strongly. Participants described phrases such as “support for you and your farm,” “financing,” “investment protection,” and “debt management” as timely and relevant given the financial pressures facing many farms. Several participants also appreciated that the key messages were clear, concise, and prominently displayed, allowing them to quickly understand what support or information was being offered. In many cases, participants indicated that relevance of the message outweighed the need for highly engaging visuals, particularly when the content spoke directly to current operational or financial challenges.

“All the images [Attention-grabbing B, AI-generated B, Humour A] draw your attention to it, because they're cute and funny, but the last one [Traditional B] was, like, those are the things that I want help with, financing and stuff, so that caught my attention.” – British Columbia

Reactions to the AI-generated concepts generated more mixed reactions. Some participants felt the images were distinctive and could attract attention online, and several also appreciated the concise messaging used in these concepts. However, others expressed reservations about the use of AI-generated imagery in government communications. While a few participants suggested using AI could be seen as modern or cost-effective, others indicated they would prefer the Government of Canada rely on traditional design approaches and human creators. Notably, few participants initially noticed the AI symbol or wording indicating the images were AI-generated; however, once identified, the majority felt it was important that this information be clearly disclosed. Several discussions also suggested an age divide: older participants were sometimes more receptive to the visuals, while younger participants were more likely to recognize the images as AI-generated and respond more critically. These findings suggest that while AI-generated visuals may support initial attention-getting, they may also introduce questions about credibility or appropriateness, particularly among more digitally savvy audiences.

“My chicken has done that pose [AI-generated A], but the government isn’t going to be out there with a camera, trying to get these funny poses of animals and everything. It probably costs us [taxpayers] more money, whereas this [AI generation] takes two seconds. It’s supposed to be a funny thing. I mean, obviously we want some more serious real images if it’s a real story. Like we want to see the real family [Similar to sector B], but this.. that’s the point of it, right? It’s just a quick little cute picture to make us laugh and catch our attention.” – Manitoba

“The more obviously AI, the more repulsive, in general.” – Atlantic Canada

Approaches designed to be more visually attention-grabbing also generated somewhat more mixed reactions, though some participants felt these concepts would stand out in a social media feed. For example, some responded positively to the simplicity of visuals such as the tiles, “Farms, Money, Loans,” while livestock producers in particular reacted favourably to the image of a cow wearing sunglasses, noting that it was memorable and likely to catch their attention. At the same time, some participants questioned whether this style was the most appropriate for communications from the Government of Canada, suggesting attention-grabbing visuals should still be balanced with a tone that reflects the seriousness of the topic. This highlights a tension between capturing attention and maintaining credibility, with participants indicating that visual impact alone is not sufficient if the tone does not align with expectations for government communications.

Humour-based approaches and lighthearted and trending concepts were generally viewed as the least effective. A number of participants questioned whether humour was appropriate for communications from the Government of Canada on topics related to farming operations or financial challenges. While some indicated humour could be acceptable for less serious topics, many felt issues affecting farm finances and business management require a more direct and professional tone. In some cases, humour was seen as undermining the seriousness of the message or reducing trust in the content.

“You shouldn’t use humour when talking about financial situations. It would almost seem like a scam. I would prefer, and be more inclined to click on, an advertisement had it been more supportive, emotionally comparable. It’s hard to indulge humour at such a stressful time.” – Saskatchewan

Reactions to the lighthearted and trending concept related to cybersecurity illustrated this tension. While participants generally agreed cybersecurity is an important and relevant issue for farms, many reacted negatively to the image of an anxious farmer used in the concept. Some commented that the visual reflected the stress they already experience and suggested they might scroll past the ad rather than engage with it. This suggests that emotional tone and imagery can influence engagement, particularly where content risks reinforcing negative or stressful circumstances or experiences.

Taken together, these discussions suggest communications directed at producers are most effective when they feel credible, relevant, and grounded in the realities of farming operations. Concepts that reflect familiar sector communications or clearly communicate practical information appear more likely to resonate than approaches perceived as overly stylized, humorous, or experimental. Overall, participants prioritized clarity, relevance, and credibility over creativity or novelty, particularly for communications related to financial supports or operational challenges.

Conclusions

Overall, producers described Canada's agricultural and agri-food sector as operating in an increasingly complex environment shaped by economic, operational, environmental, and policy pressures. Rather than identifying a single dominant issue, participants consistently described an environment in which multiple challenges interact and compound one another. Rising operating costs, land affordability, labour shortages, regulatory requirements, weather-related challenges, and market uncertainty were all frequently cited as pressures shaping the long-term sustainability of farm operations. Producers across regions referenced increasingly unpredictable weather patterns and environmental extremes, which were described as adding risk and uncertainty to an already challenging operating environment. Together, these factors contribute to a sense that farming has become increasingly complex and financially constrained, making long-term planning and investment decisions more difficult for many producers.

Within this broader context, participants frequently emphasized the importance of a policy and regulatory environment that supports the sector's ability to operate efficiently and remain competitive. While producers generally acknowledged the importance of maintaining strong standards for food safety and environmental protection, many described regulatory processes as complex and administratively burdensome. Smaller operations in particular noted compliance and program application requirements can be difficult to manage without dedicated staff. Participants often suggested simplifying processes, improving coordination across levels of government, and ensuring rules reflect the practical realities of farm operations could help reduce administrative strain while maintaining appropriate standards.

The discussions also reinforced the importance of stable market access and international trade for Canada's agricultural sector. Producers widely recognized that export markets are essential to sustaining demand and supporting commodity prices. At the same time, they also described international trade as a source of uncertainty, noting geopolitical tensions, tariffs, and shifting global relationships can have significant implications for agricultural markets. In this context, participants emphasized the importance of maintaining stable trade relationships, ensuring Canadian producers are able to compete on a level playing field internationally, and improving the movement of agricultural and agri-food products across Canada by facilitating interprovincial trade.

Looking ahead, producers also highlighted the evolving role of innovation and technology in agriculture. While many participants described using digital tools to improve efficiency and decision-making, adoption varied considerably across operations. Larger farms were generally more likely to report using precision agriculture tools and automated systems, while smaller operations were often more cautious due to cost considerations or limited connectivity. Participants broadly viewed technological innovation as an important component of the sector's future, though several noted infrastructure and affordability will continue to shape the pace of adoption.

Finally, the discussions suggest awareness of federal programs and services remains relatively limited among producers. Many participants indicated that they are more likely to learn about government supports through industry associations, sector media, or peer networks than directly through government channels. Awareness of the broader policy framework guiding these programs was also limited; few participants were familiar with the Sustainable Canadian Agricultural Partnership or aware of the work underway to develop the next five-year policy framework for the sector, currently referred to

as the Next Policy Framework (NPF). When introduced to the concept during the discussions, participants emphasized that future programming should continue to focus on areas such as environmental sustainability, climate resiliency, innovation, and maintaining competitive access to markets. Among those who had accessed federal programs, funding was often viewed as valuable in supporting investments such as infrastructure improvements or technology adoption. However, participants frequently described application processes as complex and time-consuming, particularly for smaller operations with limited administrative capacity.

The communications testing conducted as part of the study also reinforced the importance of credibility and relevance in engaging producers. Participants responded most positive to communications approaches that felt familiar and aligned with how information is typically shared within the agricultural community. Concepts that reflected sector-style or traditional communications or clearly conveyed practical information were generally viewed as most effective, while approaches perceived as overly stylized or humorous were less well received.

Taken together, the findings illustrate a sector that continues to adapt to changing economic conditions, evolving technologies, environmental pressures, and shifting market dynamics. Producers emphasized the importance of policies and programs that are practical, accessible, and reflective of the realities of farming across Canada's diverse regions and commodities. Ensuring government supports are easy to navigate, regulatory processes remain workable, and producers continue to have reliable access to domestic and international markets were all identified as important factors in supporting the long-term stability and competitiveness of Canada's agricultural and agri-food sector.

Appendix A: Qualitative methodology report

Methodology

The research included a series of sixteen (16) focus groups between February 23 and 26, 2026, with producers; adults aged 18 who are farmers and ranchers who hold or share primary responsibility for making decisions regarding their farm operations and who had \$10,000 or more in annual farm sales in 2025.

Our proposed approach ensured we were able to accommodate producers from different regions, producing a variety of commodities, and in different languages including two distinct groups with those who reside in official language minority communities (OLMCs). The groups were conducted as follows:

- 2 groups with producers in British Columbia
- 2 groups with producers in Alberta
- 2 groups with producers in Saskatchewan
- 2 groups with producers in Manitoba
- 2 groups with producers in Ontario
- 3 groups with producers in Quebec; 2 with producers in French and one with producers in English
- 2 groups with producers in Atlantic Canada
- 1 group with French-speaking producers outside Quebec

For each group we ensured a good mix by commodity type, farm income, region, gender, age, ethnic/cultural background including Indigenous, and language including Official Language Minority Communities.

The groups were up to ninety (90) minutes in length and participants received an honorarium in appreciation for their time. We recruited eight (8) participants in order to achieve a desired minimum of six participants per group. In total, 113 producers participated in the research. Please refer to the recruitment screener in Appendix B for all relevant screening and qualifications criteria.

Schedule of focus groups with number of participants by audience and region

Group Number	Date	Region	Participants recruited	Number of participants
1	Monday, February 23, 2026	Atlantic Canada	8	7
2	Monday, February 23, 2026	Quebec (French)	8	7
3	Monday, February 23, 2026	Manitoba	8	7
4	Monday, February 23, 2026	Saskatchewan	8	7
5	Tuesday, February 24, 2026	Atlantic Canada	8	7

Group Number	Date	Region	Participants recruited	Number of participants
6	Tuesday, February 24, 2026	Ontario	8	6
7	Tuesday, February 24, 2026	Manitoba	8	8
8	Tuesday, February 24, 2026	Saskatchewan	8	6
9	Wednesday, February 25, 2026	Quebec (French)	8	8
10	Wednesday, February 25, 2026	Ontario	8	7
11	Wednesday, February 25, 2026	Alberta	8	8
12	Wednesday, February 25, 2026	British Columbia	8	8
13	Thursday, February 26, 2026	Outside Quebec (French)	8	6
14	Thursday, February 26, 2026	Quebec (English)	8	8
15	Thursday, February 26, 2026	Alberta	8	7
16	Thursday, February 26, 2026	British Columbia	8	6
Total			128	113

Recruitment

Given the parameters of this project, our fieldwork subcontractor, Quality Response, relied on a variety of recruitment methods: lists/databases, association referrals, in-market experts and random digit dialing (RDD). Quality Response and their partners are in the business of conducting professional public opinion and market research. Their integrity is founded on the accurate collection, tabulation and storage of data. Their capabilities and quality control measures either meet or exceed industry standards as defined by industry Associations and are in accordance with Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research.

Quality Response began with a list of producers generated by Dun & Bradstreet. They also reached out to provincial Associations representing producers and ask for their assistance in notifying members of the upcoming research. Any outstanding quotas were filled with partner databases (outlined below) and random digit dialing. In all instances, potential respondents were asked qualifying questions, and their language ability was assessed.

Quality Response, and their selected suppliers, reached out to members of their respective databases first via email and follow-up with telephone calls to pre-qualify participants. They then conducted telephone recruitment to supplement in each market.

For recruitment in Ontario, Quality Response relied on their own proprietary database of approximately 35,000 Canadians with profiling on a range of attributes including standard personal demographics, household composition, medical background, technology usage, financial services, health and wellness, business profiles, and other relevant criteria. Their database is constantly being updated and replenished and operates out of their own, onsite telephone room in Toronto, Ontario. Potential group participants are recruited to their database via mixed-mode: following a proprietary telephone survey, online, referral, social media and print advertising. Initial contact is often made via email or online pre-screening for speed and economies, followed up by personal telephone recruitment and pre-group attendance confirmation.

For recruitment in British Columbia, the Prairies, and Atlantic Canada, Quality Response partnered with Metroline Research. Metroline's database includes approximately 4,500 Canadians. New participants are added to their database via referrals and online advertising. Metroline profiles their database for a variety of characteristics including but not limited to: location; marital status; occupation; and income.

Additionally for recruitment in British Columbia, Quality Response partnered with Walmsley Research. Walmsley's database is comprised of approximately 5,500 residents of British Columbia. They rely on referrals and online advertisements to recruit to their database. In addition to a variety of demographics, their database is profiled for: age of children, occupation, spouse's occupation, or health issues.

For recruitment in the Prairies, Quality Response partnered with Pele Research. Located in Manitoba and Saskatchewan, Pele Research's database includes approximately 3,000 Canadians per province. Pele Research profiles their database by name, age, gender, income, education, occupation, and phone number.

For recruitment in Quebec, Quality Response relied on MBA Recherche. MBA Recherche's vast database includes approximately 35,000 Canadians across Quebec. They use Google ads, their website, telephone RDD lists, and referrals to recruit new participants. In addition to a variety of demographics, MBA Recherche's profiling includes automobile types, substance use, and mobile phone attributes.

For recruitment in Atlantic Canada, Quality Response also partnered with Brookson Research. Brookson Research's database is comprised of approximately 9,500 Canadians. New people are added to the database via phone, text, email and corporate website. The company does twice-yearly drives to refresh the database in English and French. The database is profiled by name, gender, age, contact information, city of residence, education, mother tongue, occupation and history attending market research sessions.

Moderation

We relied on two qualified moderators. Given the timeline for the project, using two moderators allowed us to conduct all of the focus groups over the course of one week.

Both moderators attended the first focus group and a debrief with the Project Authority after. This ensured both were aware of the flow of the focus groups and were involved in any conversation about potential changes to the discussion guide or flow of conversation for each subsequent group.

In our experience, there is value in using multiple moderators (within reason) as it ensures no single moderator develops early conclusions. Each moderator takes notes and summarizes their groups after each night. The moderators each provide a debrief on their groups including the functionality of the

discussion guide; any issues relating to recruiting, turnout, or technology; and key findings including noting instances where they were unique and where they were similar to previous sessions. Together, they discuss the findings both on an ongoing basis in order to allow for probing of areas that require further investigation in subsequent groups, and before the final results are reported

A note about interpreting qualitative research results

It is important to note, when reading the qualitative findings, that qualitative research is a form of scientific, social, policy, and public opinion research. Focus group research is designed to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number.

Glossary of terms

The following is a glossary of terms used throughout the report to impart the qualitative findings. These phrases are used when groups of participants share a specific point of view. Unless otherwise stated, it should not be taken to mean the rest of participants disagreed with the point; rather others either did not comment or did not have a strong opinion on the question.

- Few - Few is used when less than 10% of participants have responded with similar answers.
- Several - Several is used when fewer than 20% of the participants responded with similar answers.
- Some - Some is used when more than 20% but significantly fewer than 50% of participants with similar answers.
- Many - Many is used when nearly 50% of participants responded with similar answers.
- Majority/plurality - Majority or plurality are used when more than 50% but fewer than 75% of the participants responded with similar answers.
- Most - Most is used when more than 75% of the participants responded with similar answers.
- Vast majority - Vast majority is used when nearly all participants responded with similar answers, but several had differing views.
- Unanimous/almost all - Unanimous or almost all are used when all participants gave similar answers or when the vast majority of participants gave similar answers and the remaining few declined to comment on the issue in question.

Appendix B: Recruitment screener

Online focus group summary

- 16 focus groups total
- Recruit 8 participants per focus group
- Groups are 90 minutes long
- All must be Canadian adults (18+) who are farmers or ranchers
- All must hold or share primary responsibility for operation decisions
- All must have \$10,000+ annual farm sales in 2025
- Participants **must** have high speed internet access and a webcam
- Must ensure good mix of other demographics (commodity, gender, age, etc.)

Group number	Region	Time
Monday, February 23, 2026		
1 (SC)	Atlantic Canada	10:00 am ET / 11:00 am AT / 11:30 am NT
2 (SC)	Quebec (French)	1:00 pm ET
3 (DA)	Manitoba	1:00 pm ET / 12:00 pm CT
4 (SC)	Saskatchewan	3:00 pm ET / 2:00 pm CT
Tuesday, February 24, 2026		
5 (SC)	Atlantic Canada	10:00 am ET / 11:00 am AT / 11:30 am NT
6 (SC)	Ontario	1:00 pm ET
7 (DA)	Manitoba	1:00 pm / 12:00 pm CT
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Wednesday, February 25, 2026		
9 (SC)	Quebec (French)	10:00 am ET
10 (SC)	Ontario	1:00 pm ET
11 (DA)	Alberta	2:00 pm ET / 12:00 pm MT
12 (SC)	British Columbia	3:00 pm ET / 12:00 pm PT
Thursday, February 26, 2026		
13 (SC)	Outside Quebec (French)	10:00 am ET / 11:00 am AT / 11:30 am NT
14 (SC)	Quebec (English)	1:00 pm ET
15 (DA)	Alberta	2:00 pm ET / 12:00 pm MT
16 (SC)	British Columbia	3:00 pm ET / 12:00 pm PT

Hello/Bonjour, my name is _____ and I'm calling on behalf of Earncliffe, a national public opinion research firm. We are organizing a series of discussion groups on issues of importance to Canadian producers, on behalf of the Government of Canada, specifically for the Department of Agriculture and Agri-Food Canada. This will involve a series of online group discussions with agricultural producers, including farmers and ranchers. These discussions are about issues facing agricultural producers and agricultural policy and programs. We are looking

for people who would be willing to participate. Participants will receive an honorarium of \$300 for their participation. May I continue?

Yes [continue]
No [thank and terminate]

Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais? [if french, continue in french or arrange a call back with french interviewer: Nous vous rappellerons pour mener cette entrevue de recherche en français. Merci. Au revoir].

Participation is voluntary and confidential. We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view. All opinions expressed will remain anonymous and views will be grouped together to ensure no particular individual can be identified. But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix and variety of people. May I ask you a few questions? This will only take about 5 minutes.

Yes [continue]
No [thank and terminate]

Monitoring text:

[Read to all]: "This call may be monitored or audio taped for quality control and evaluation purposes.

[Additional clarification if needed]:

- To ensure that I (the interviewer) am reading the questions correctly and collecting your answers accurately;
- To assess my (the interviewer) work for performance evaluation;
- To ensure that the questionnaire is accurate/correct (i.e. evaluation of programming and methodology – we're asking the right questions to meet our clients' research requirements – kind of like pre-testing)
- If the call is audio taped, it is only for the purposes of playback to the interviewer for a performance evaluation immediately after the interview is conducted or it can be used by the Project Manager/client to evaluate the questionnaire if they are unavailable at the time of the interview – all audio tapes are destroyed after the evaluation.

1. Are you an agricultural producer or farmer who holds or shares primary responsibility for making decisions for your agricultural operation?

Yes [go to Q3]
No [continue]

2. Is there someone else in your household who fits this definition [read if necessary: Is an agricultural producer or farmer who holds or shares primary responsibility for making decisions for your agricultural operation]?

Yes [continue]
 No [thank and terminate]

[if yes, ask to speak with this person and start from the beginning but skip questions 1 and 2.]

3. Could you also please tell me which of the following categories your farm sales for 2025 fall into? [ensure good mix]

Under \$10,000	1	[thank and terminate]
\$10,000 to just under \$100,000	2	
\$100,000 to just under \$500,000	3	
\$500,000 to just under \$1,000,000	4	
\$1,000,000+	5	
DK/NR	9	[thank and terminate]

4. Could you please tell me which of the following age categories you fall into? Are you... [ensure good mix]

Under 18 years	1	[thank and terminate]
18-29 years	2	
30-49 years	3	
50+ years	4	

5. Which province or territory do you live in? [ensure good mix]

Atlantic Canada		
Newfoundland and Labrador	1	
Nova Scotia	2	
New Brunswick	3	
Prince Edward Island	4	
Quebec	5	
Ontario	6	
Manitoba	7	
Saskatchewan	8	
Alberta	9	
British Columbia	10	
Nunavut	11	[if found, group with Manitoba]
Northwest Territories	12	[if found, group with Alberta]
Yukon	13	[if found, group with British Columbia]
None of the above	99	[thank and terminate]

6. Are you...? [ensure good mix]

Male gender	1
Female gender	2
Other gender identity	3

7. What type of production do you draw most of your gross farm revenue from? [ensure good mix]

Field crops (e.g., canola, wheat, soybeans, oilseeds)	1
Fruits and vegetables (including viticulture/greenhouse)	2
Livestock – cattle/beef	3
Livestock – dairy	4
Livestock – hogs/pigs	5
Livestock – poultry/eggs	6
Other livestock (e.g., sheep, goats, bison, bees)	7
Horticulture (e.g., floriculture, nurseries, sod)	8
Other (please specify)	9

8. How many years have you been managing a farm business? [ensure good mix]

Less than 5 years	1
6 to 20 years	2
20 or more years	3

This research will require participating in a video call online.

9. Do you have access to a desktop or laptop computer with high-speed internet which will allow you to participate in an online discussion group?

Yes	1	
No	2	[thank and terminate]

10. Does your desktop or laptop computer have a camera that will allow you to be visible to the moderator and other participants as part of an online discussion group?

Yes	1	
No	2	[thank and terminate]

11. Do you have a personal email address that is currently active and available to you?

Yes	1	[please record email]
No	2	[thank and terminate]

12. Have you participated in a discussion or focus group for the Government of Canada before? A discussion group brings together a few people in order to know their opinion about a given subject.

Yes	1	[continue]
No	2	[go to Q15]
Don't know/Prefer not to answer	9	[thank and terminate]

13. When was the last time you participated in a discussion or focus group that was sponsored by the Government of Canada?

If within the last 6 months	1	[thank and terminate]
If not within the last 6 months	2	[continue]
Don't know/Prefer not to answer	9	[thank and terminate]

14. How many of these sessions have you attended in the last five years?

If 4 or less	1	[continue]
If 5 or more	2	[thank and terminate]
Don't know/Prefer not to answer	9	[thank and terminate]

15. Participants in discussion groups are asked to voice their opinions and thoughts. How comfortable are you in voicing your opinions in front of others? Are you...?

Very comfortable	1	[minimum 4 per group]
Somewhat comfortable	2	[continue]
Not very comfortable	3	[thank and terminate]
Not at all comfortable	4	[thank and terminate]
Don't know/Prefer not to answer	9	[thank and terminate]

16. Sometimes participants are asked to read text and/or review images during the discussion. Is there any reason why you could not participate?

Yes	1	[ask q16a]
No	2	[skip to q17]
Don't know/Prefer not to answer	9	[thank and terminate]

- 16a. Is there anything we could do to ensure that you can participate?

Yes	1	[ask q16b]
No	2	[Thank and terminate]
Don't know/Prefer not to answer	9	[Thank and terminate]

16b. What specifically? [Open end]

[Interviewer to note for potential one-on-one interview]

17. Based on your responses, it looks like you have the profile we are looking for. I would like to invite you to participate in a small group discussion, called an online focus group, we are conducting at [time], on [date].

As you may know, focus groups are used to gather information on a particular subject matter; in this case, the discussion will touch on your views related to agricultural topics that may impact Canadians. The discussion will consist of up to 8 people and will be very informal.

It will last up to up to 90 minutes and you will receive \$300.00 as a thank you for your time. Would you be willing to attend?

Yes	1	[recruit]
No	2	[thank and terminate]
Don't know/Prefer not to answer	9	[thank and terminate]

PRIVACY QUESTIONS

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

P1) First, we will be providing a list of respondents' first names and profiles (screener responses) to the moderator so that they can sign you into the group. Do we have your permission to do this? I assure you it will be kept strictly confidential.

Yes	1	Go to P2
No	2	Go to P1a

We need to provide the first names and background of the people attending the focus group because only the individuals invited are allowed in the session and this information is necessary for verification purposes. Please be assured that this information will be kept strictly confidential.

P1a) Now that I've explained this, do I have your permission to provide your first name and profile?

Yes	1	Go to P2
No	2	Thank & terminate

- P2) A recording of the group session will be produced for research purposes. The recordings will be transcribed using Artificial Intelligence and used by the research professional to assist in preparing a report on the research findings and may be used by the Government of Canada for internal reporting purposes.

Do you agree to be recorded for research and reporting purposes only?

- | | | |
|-----|---|--|
| Yes | 1 | Thank & Go to P3 |
| No | 2 | Read respondent info below & go to P2a |

It is necessary for the research process for us to record the session as the researchers need this material to complete the report.

- P2a) Now that I've explained this, do I have your permission for recording?

- | | | |
|-----|---|-------------------|
| Yes | 1 | Thank & Go to P3 |
| No | 2 | Thank & terminate |

- P3) Employees from the Government of Canada may also be online to observe the groups. Do you agree to be observed by Government of Canada employees?

- | | | |
|-----|---|--------------------------|
| Yes | 1 | Thank & Go to invitation |
| No | 2 | Go to P3a |

- P3a) It is standard qualitative procedure to invite clients, in this case, Government of Canada employees, to observe the groups online. They will be there simply to hear your opinions firsthand although they may take their own notes and confer with the moderator on occasion to discuss whether there are any additional questions to ask the group. Do you agree to be observed by Government of Canada employees?

- | | | |
|-----|---|--------------------------|
| Yes | 1 | Thank & Go to invitation |
| No | 2 | Thank & terminate |

INVITATION:

Wonderful, you qualify to participate in one of our discussion sessions. As I mentioned earlier, the group discussion will take place [insert date @ time] for up to 90 minutes.

Group number	Region	Time
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16 (SC)	British Columbia	3:00 pm ET / 12:00 pm PT

We ask that you login a few minutes early to be sure you are able to connect and to test your sound (speaker and microphone). If you require glasses for reading, please make sure you have them handy as well.

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to attend, please call us so that we may get someone to replace you. You can reach us at [insert phone number] at our office. Please ask for [name]. Someone will call you in the days leading up to the discussion to remind you.

So that we can call you to remind you about the discussion group or contact you should there be any changes, can you please confirm your name and contact information for me?

First name:

Last name:

Email:

Daytime phone number:

Evening phone number:

If the respondent refuses to give his/her first or last name, email or phone number please assure them that this information will be protected in accordance with the *Privacy Act* and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the discussion group. If they still refuse, thank and terminate

Appendix C: Discussion guide

Introduction

Section time: 5 minutes / Cumulative time: 5 minutes

Moderator introduces herself/himself and her/his role: role of moderator is to ask questions, make sure everyone has a chance to express themselves, keep track of the time, be objective/no special interest.

- The name of the firm the moderator works for, and the type of firm that employs them (such as, an independent marketing research firm).
- Role of participants: speak openly and frankly about opinions, remember that there are no right or wrong answers and no need to agree with each other.
- Results are confidential and reported all together/individuals are not identified/participation is voluntary.
- The length of the session (approximately 90 minutes).
- The presence of any observers, their role and purpose, and the means of observation (observers viewing and listening in remotely).
- The presence and purpose and intended use of any recording or artificial intelligence.
- Confirm participants are comfortable with the platform and some of the specific settings such as: how to mute and unmute themselves; where the hand raise button is; and, the chat box.
- As mentioned, when we invited you to participate in this discussion group, we're conducting research on behalf of the Government of Canada, and Agriculture and Agri-Food Canada (AAFC) more specifically. The purpose of the research is to explore important issues facing farmers, producers and the farm sector across Canada. This research will help AAFC to make decisions regarding programs and services and to help inform public policy.

Moderator will go around the table and ask participants to introduce themselves.

- To get started, please tell us your first name, where you are joining us from, and a little about your operation (such as types of products, size of operation).

Warm-up/Context setting

Section time: 5 minutes / Cumulative time: 10 minutes

To begin, I would like to ask you a couple of high-level questions to get us warmed up.

- [chat box] First, as far as you're concerned, what is the most important issue facing Canada's agricultural and agri-food sector today? Please write your answer in the chat. You can share your response with everyone. [Moderator to review and explore answers.]
 - We're probably going to cover most of these topics over the course of our discussion but does anyone want to share what they wrote down?

- [chat box] What do you think the role of the federal government should be in supporting Canada's agricultural and agri-food sector today? Again, please share your answer with everyone in the chat. [Moderator to review and explore answers.]
 - Does anyone want to share what they wrote down?

Digital communications and social media

Section time: 10 minutes / Cumulative time: 20 minutes

I would like to begin by gathering your reactions to some draft social media. Before we look at specific posts, I would like to understand more generally how you use communications and social media in your work.

- Are there any websites, publications or social media you typically go to for information related to your operation?
 - Which ones? Why?
- [show of hands] Do you actively use social media for your work?
 - Which platforms do you use most often?
 - How do you use them?
- [show of hands] Does anyone follow AAFC's social media channels (Facebook, X, Instagram or LinkedIn)?
 - What are your overall impressions?

We have a number of different concepts to share with you, each with different visuals and messaging (wording) components. These represent different approaches AAFC is exploring to improve how they communicate with producers on social media. The concepts you'll see test different styles—visuals, tone, and messaging—to help AAFC understand what resonates most with producers like you.

It is important to note that these are only draft concepts, meant to give you a feel for the overall direction. I mention that because I don't want you to get caught up in the production quality.

We will show each concept one at a time and I would like to get your reactions to them.

[moderator to show four concepts in random order in each group as outlined in the Appendix. moderator to use the following probes.]

- What is your immediate reaction to this concept?
- Would you notice it/Would it capture your attention?
- Does this feel relevant to you and would it motivate you to do anything?
 - [if yes] What would you be motivated to do?
- Which approach would be most effective in getting producers' attention? Why?
- Which would be the least effective? Why?
- Did any feel off-brand or inappropriate for the Government of Canada? Why?
- **[For concepts generated by AI]**
 - Did you notice that this concept was generated by AI?

- Is this noted clear enough?
- How do you feel about the Government of Canada using images created by AI in its materials? Is that something you're comfortable with, or is it something you have concerns about?

International trade

Section time: 20 minutes / Cumulative time: 40 minutes

Let's begin with international trade.

- How, if at all, does international trade affect your farming operation?
 - Does it affect you directly (for example, where your products are sold), or more indirectly (for example, prices, volatility, planning)?
 - Have you needed to adapt to trade-related changes? If so, what did you change, and how do you manage that risk today?
- What signals tell you that trade conditions are improving or worsening? Probe: Prices, buyers, volatility, planning horizons, tariffs
- Canada, the United States and Mexico will be undergoing a review of the Canadian United States Mexico Agreement known as CUSMA.
 - Has your operation been affected by the changes in Canada's trading relationship with the United States in the last year? If so, how?
 - What would a positive or negative outcome look like for you/your operation?
- Recently, Canada and China reached a significant trade agreement that includes tariff reductions on agricultural products.
 - Do you expect that this trade agreement will have positive benefits for your operation?
- How important, if at all, do you feel finding new trade opportunities in different markets is for the growth of the Canadian agricultural sector? Why?
- When Canada signs new trade agreements, what supports, tools, or market intelligence do you use to take advantage of the new opportunities, for example, to enter new markets, meet regulatory requirements, or connect with buyers?
- Should Canada be exploring as many international opportunities as possible? Or try to be more strategic? If so, which markets should Canada focus on and pursue trade agreements with?
- What role should the federal government, and AAFC specifically, play when trade issues occur?

Now shifting to domestic demand for your farm's products.

- In the past year, would you say domestic demand has increased, decreased or stayed the same for your products? Why?
 - [if yes] Do you expect the increased demand to continue or level off?

Digital agriculture

Section time: 15 minutes / Cumulative time: 55 minutes

Next, I would like to talk about technology and digital agriculture.

- What types of technology, digital tools or innovation, if any, do you currently use in your operation?
 - What triggered the decision to adopt this technology/innovation?
- In which areas of your operation does technology or innovation have the biggest impact?

Probe: Farm management, operations, precision agriculture, labour, data collection and storage
- What are the criteria you use to determine whether or not to adopt new technology?
 - What strategies help you to address the challenges?
- Where did you hear about the technologies/innovations that you've adopted on your farm?
- Which technologies or innovations do you think hold the most promise for your operation – or for the sector overall?
- How would you describe your Internet connectivity? Is connectivity a barrier for adopting new technology?
- Do you take any steps, even basic ones, to protect your farm's digital data? Why or why not?
 - [if yes] What steps do you take?

Awareness of AAFC Programs

Section time: 10 minutes / Cumulative time: 65 minutes

Now let's talk about awareness of governmental agriculture programs and services.

- When you think of governmental agriculture programs and services, what comes to mind?

Probe for types and names of programs they are familiar with.

 - What do you think of these programs? Why?
- What signals tell you a program is worth your time?
- How familiar would you say you are with AAFC and their programs and services?
- [show of hands] Has anyone ever applied to an AAFC program?
- Do you feel you have the information you need about AAFC programs? Why or why not?
 - [if not] What information needs do you have? What would you like to know more about?
- How do you generally learn about AAFC programs?
- How would you prefer to hear about AAFC's program information?

Next Policy Framework

Section time: 10 minutes / Cumulative time: 75 minutes

The Government of Canada is asking for feedback from the agriculture sector on the next five-year plan to support agriculture and agri-food in Canada. This is currently called the Sustainable Canadian Agricultural Partnership, which ends on March 31, 2028. Agriculture and Agri-Food Canada is consulting Canadians to determine what the next iteration of this programming should consist of. During these initial planning stages, we are referring to the new framework as the “Next Policy Framework”, or the NPF, however, once themes have been identified, the framework will be given a new title. The NPF will run from 2028 to 2033 and includes federal, provincial and territorial investment aimed at strengthening and growing Canada's agriculture and agri-food sector.

- [show of hands] Have you heard about the Sustainable Canadian Agricultural Partnership?
- [show of hands] Are you aware that AAFC is in the process of developing its successor, the Next Policy Framework?
- Which areas do you think the Next Policy Framework should focus on?
Probe: markets and trade, growth and competitiveness, science and innovation, climate change and resiliency, environmental sustainability

Regulatory burden/Red tape reduction

Section time: 10 minutes / Cumulative time: 85 minutes

Let's pivot to regulations.

- Overall do you feel regulatory requirements on farms have increased, decreased, or stayed about the same in recent years?
- Can anyone share a time when a regulation created a real headache?
- Are there any regulations you believe are necessary or worthwhile?
- If you could fix one thing about regulation(s), what would it be?

Conclusion

Section time: 5 minutes / Cumulative time: 90 minutes

[moderator to request additional questions are sent via the chat box directly to the moderator and probe on any additional areas of interest.]

This concludes what we needed to cover tonight.

- Is there anything we didn't ask that you think is important?
- Of everything we discussed, what feels most misunderstood by government decision-makers?

We really appreciate you taking the time to share your views. Your input is very important. The final report will be publicly available via Library and Archives Canada website in August.

Order of concepts tested

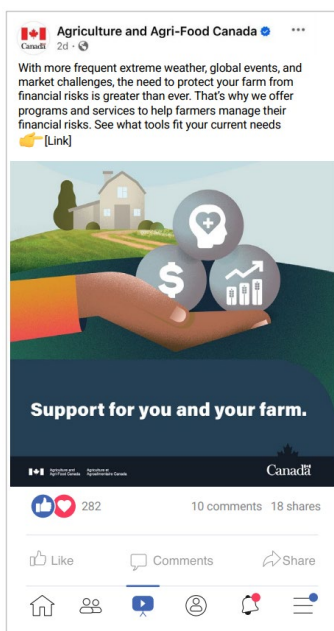
Group number	Region	Concepts
Monday, February 23, 2026		
1 (SC)	Atlantic Canada	Similar to sector A Attention-grabbing B AI-generated A Humour B
2 (SC)	Quebec (French)	Attention-grabbing A AI-generated B Humour A Traditional B
3 (DA)	Manitoba	AI-generated A Humour B Traditional A Similar to sector B
4 (SC)	Saskatchewan	Humour A Traditional B Similar to sector A Attention-grabbing B
Tuesday, February 24, 2026		
5 (SC)	Atlantic Canada	Traditional A Similar to sector B Attention-grabbing A AI-generated B
6 (SC)	Ontario	Similar to sector A Attention-grabbing B AI-generated A Humour B
7 (DA)	Manitoba	Attention-grabbing A AI-generated B Humour A Traditional B
8 (SC)	Saskatchewan	AI-generated A Humour B Traditional A Similar to sector B
Wednesday, February 25, 2026		
9 (SC)	Quebec (French)	Humour A Traditional B Similar to sector A Attention-grabbing B
10 (SC)	Ontario	Lighthearted and trending A Similar to sector B Attention-grabbing A AI-generated B
11 (DA)	Alberta	Similar to sector A Attention-grabbing B AI-generated A Humour B

Group number	Region	Concepts
12 (SC)	British Columbia	Attention-grabbing A AI-generated B Humour A Traditional B
Thursday, February 26, 2026		
13 (SC)	Outside Quebec (French)	AI-generated A Humour B Lighthearted and trending A Similar to sector B
14 (SC)	Quebec (English)	Humour A Traditional B Similar to sector A Attention-grabbing B AI-generated A
15 (DA)	Alberta	Lighthearted and trending A Similar to sector B Attention-grabbing A AI-generated B
16 (SC)	British Columbia	Similar to sector A Attention-grabbing B AI-generated A Lighthearted and trending A Humour B

Appendix D: Concepts tested

Traditional

Concept A



Concept B



Similar to sector

Concept A



Concept B

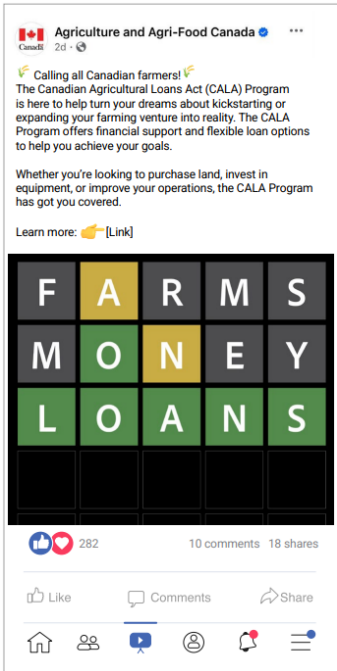


Attention-grabbing

Concept A



Concept B



AI-generated

Concept A



Concept B



Humour

Concept A



Concept B



Lighthearted and trending

Concept A

