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Methodology Summary

2025-26 Strategic Issues Survey with Producers (Wave IX)

Prepared by: Elemental Data Collection

Prepared for: Agriculture and Agri-Food Canada

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

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Canada 

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Agriculture and Agri-Food Canada
1341 Baseline Road
Ottawa, Ontario K1A 0C5
Canada
Phone: 1-855-773-0241
TTY: 613-773-2600
Email: aafc.info.aac@agr.gc.ca

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Introduction

Agriculture and Agri-Food Canada (AAFC) commissioned Elemental Data Collection to conduct quantitative research to collect data from Canadian farm producers. Phone interviews were collected in one wave from December 3rd, 2025, to January 27th, 2026, with the final amount reaching 1,602 Canadian farmers, 18 years of age and older with a farm income of at least \$10,000.

1.1 Background

In 2024, Canada's agriculture and agri-food system generated \$149.2 billion, representing about 7 percent 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 – with previous waves conducted in: 2023, 2021, 2018 (report completed in 2019), 2017, 2013, 2011, 2009 and 2007.

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.

1.2 Research objectives

The survey builds on tracking questions from previous waves to note trends over time but also provides insights on new and evolving areas of interest to AAFC.

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

- Understanding Canadian producers' attitudes and opinions in relation to the agricultural sector.
- Determining Canadian producers' awareness of AAFC's agricultural programs and initiatives.
- Identifying emerging issues in agriculture.
- Impacts on trade.

Through the collection of demographic data (region, commodity type, gender, age, ethnicity, income, and practice adoption history), this research provides segmented results for more targeted interventions.

1.3 Contract value

The total contract value of this research was \$117,295.36, including HST.

1.4 Political neutrality certification

I hereby certify as a Representative of Elemental Data Collection that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.



Darcy Zwetko
Partner
Elemental Data Collection Inc.
dzwetko@elementaldci.com
February 18, 2026.

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Methodological summary

2.1 Survey methodology

The phone survey was conducted with a sample of 1,602 Canadian adults (18+) who are farmers or ranchers who hold or share primary responsibility for making decisions regarding their farm operations with \$10,000 or more in annual farm sales in 2025. Based on a sample of this size (n=1,602), the overall results are considered accurate to within $\pm 2.3\%$, 19 times out of 20. Details regarding the methodology are outlined below.

2.2 Sample design and selection

As the population size for the project was limited in scope due to sample availability, regional targets were observed but were never considered hard quotas. The sample for the project was purchased from Dun and Bradstreet, the same supplier as previous waves using the same initial framework. With the increased target in 2025-26 however, it was determined part-way through the project that additional sample would be required, and the sample provider utilized a second source to supplement the sample for the project in the later stages to allow for the completion of the n=1602 surveys. The sample frame was selected from all available farm producers across the country to allow for reporting along regional lines.

Strata	Completed interviews	Margin of error (%)
Atlantic Provinces	63	± 11.6
Quebec	549	± 3.9
Ontario	323	± 5.1
Prairies (includes Nunavut)	356	± 4.9
Alberta (includes Northwest Territories)	230	± 6.1
British Columbia (includes Yukon)	81	± 10.5
Canada	1,602	± 2.3

2.3 Fieldwork

The phone survey was administered in the Winter of 2025-26. The survey data was collected using computer assisted telephone interviewing (CATI) technology and was carried out by Elemental Data Collection in Ottawa, Ontario. The survey was conducted with 1,602 respondents, from December 3, 2025, to January 27, 2026. Surveys were conducted in the respondent's official language of choice. Sample groups were set to ensure each study could be tracked via region, language and respondent gender. The average length of time required to complete an interview was 23.1 minutes.

The sponsorship of the study was revealed to all respondents during the introduction. All survey respondents were informed that participation is voluntary, and information collected is protected under the authority of privacy legislation.

2.4 Participation rate

In total, 13,687 Canadian respondents were approached. The overall participation rate for this survey was 24.9%. This is consistent with typical response rates for phone surveys with this type of business respondent conducted over this length of field period. The table below presents the detailed information.

Disposition table	
Total numbers attempted	13,687
Out-of-scope - invalid	3,040
Unresolved (U)	4,525
No answer/Answering machine	4,525
In-scope - non-responding (IS)	978
Language barrier	76
Incapable of completing (ill/deceased)	132
Callback (Respondent not available)	770
Total asked	5,144
Refusal	2,488
In-scope - responding units (R)	2,656
Completed Interview	1,602
Scheduled appointments	239
Incomplete	68
NQ - Q1 - Decision maker	41
NQ - Q2 - Sales	134
NQ - Q3 - Age	0
NQ - No longer a farm	572
Quota full	0
Refusal rate %	48.4
Participation rate %	24.9
Incidence %	60.3
Average length (min)	23.1
Field timeframe	December 3 2025 - January 27 2026

The response rates were calculated using the formula: $R = R / (U + IS + R)$.

2.5 Data analysis

Weighting adjustments were applied to the survey data to ensure the results were representative of the Canadian population of Canadian farm producers, aged 18 and older, who have decision making responsibility and have a yearly revenue of \$10,000.

Specifically, the survey results were weighted by region and revenue derived from the 2021 Census of Agriculture data which can be found here:

<https://www150.statcan.gc.ca/n1/pub/71-607-x/71-607-x2022006-eng.htm>

The following table presents a breakdown of actual and weighted completions by regional strata.

Strata	Unweighted sample size	Weighted sample size
Atlantic Provinces	63	52
Quebec	549	248
Ontario	323	408
Manitoba	100	123
Saskatchewan	256	288
Alberta	230	350
British Columbia/Yukon	81	134
Total	1,602	1,602

2.6 Non-response analysis

A non-response analysis was conducted to assess the potential for non-response bias. Non-response is the result of a unit of the sample not participating in the survey—either refusing to take part in the survey (a refusal) or not being reached during the data collection period (non-contact). Non-response results in biases in the survey sample when there are differences between respondents and non-respondents.

To undertake the analysis for this survey, the unweighted sample distribution by gender, age and farm revenue was compared to the actual population (based on 2021 Census figures from Statistics Canada).

	Survey sample (unweighted)	Population (Census 2021)	% difference (plus or minus)	Survey sample (weighted)
18 to 34	4.24%	8.63%	-4.38%	3.01%
35 to 54	31.52%	30.88%	0.65%	21.49%
55 and older	64.23%	60.50%	3.73%	75.50%
Male	81.15%	69.60%	11.56%	76.88%
Female	18.85%	30.40%	-11.56%	23.12%

As there were no hard quotas set for any particular parameters within this business study, we did see some small variances in the makeup of the respondents. We did find there was an uptick in male responses and also in the oldest range of age. This is generally consistent with most business surveys of this population. As the table indicates, younger Canadians were slightly under-represented and late-age Canadians were over-represented in the survey sample. Weighting serves to reduce bias should it be present, but not to eliminate it completely. It is very unlikely this small sampling bias introduced any meaningful bias to the survey results.

2.8 Appendix

Please see accompanying documents.

Strategic Issues Survey with Producers - Wave IX 2025-2026

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

Hello/Bonjour, my name is _____ and I am calling from Elemental, a public opinion research company on behalf of Agriculture and Agri-Food Canada. Would you prefer that I continue in English or French? Préférez-vous que je continue en français ou en anglais?

We are conducting a study of agricultural producers on behalf of Agriculture and Agri-Food Canada about some important issues facing the farming sector across Canada. Your participation is voluntary, and the survey will take about 25 minutes to complete. Please be assured that your identity and individual answers will be kept strictly confidential.

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

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

NOTE TO INTERVIEWERS: Should you wish to verify the credibility of this survey, you can utilize the Canadian Research Insights Council (CRIC) Research Verification Service.

IF REQUESTED: The registration number is: 20251203-EL611.

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

LANGUAGE: [INTERVIEWER RECORDED]

1. English
2. French

A. Screening Questions

QA1. Have I reached you on your cell phone? [DO NOT READ LIST]

1. Yes
2. No

[ASK IF QA1=YES] QA2. Are you in a safe place to talk on the telephone? [DO NOT READ LIST]

1. Yes
2. No

[IF QA2=NO, READ:] We would like to conduct this interview with you when it is safe and convenient. Thank you for your time, we will call back when it is more convenient.

QA3. Before we begin the interview, I am required to inform you that for quality control reasons, this interview may be recorded.

B. Business profile

Before we begin, I'd like to ask you a couple questions to make sure you're a good fit for this survey.

QB1. Are you one of the decision makers for your farm operation? *Tracking*

[INTERVIEWER NOTE: If required, read: "In other words, do you make the business and financing decisions regarding your farm operation?" [DO NOT READ LIST]

1. Yes
2. No **[THANK AND TERMINATE]**
3. Joint

[IF YES OR JOINT, CONTINUE. IF NO, ASK TO SPEAK TO THAT PERSON, READ INTRO AGAIN. IF UNAVAILABLE, ARRANGE CALLBACK. IF NO DECISION MAKER THANK AND TERMINATE.]

QB2. In what year were you born? [Record year: YYYY] **AFTER 2007 [THANK AND TERMINATE]**

1. [If the respondent prefers not to provide a precise birth year, ask:]
Would you be willing to tell me in which of the following age categories you belong?
2. Less than 18 **[THANK AND TERMINATE]**
3. 18 to 24
4. 25 to 34
5. 35 to 44
6. 45 to 54
7. 55 to 64
8. 65 or older
99. Prefer not to say **[DO NOT READ] [THANK AND TERMINATE]**

QB3. What were the total gross sales of your farming operation in 2025? Just stop me when I reach the correct category. *Tracking*

1. Less than \$10,000 **[THANK AND TERMINATE]**

2. \$10,000 to just under \$100,000
3. \$100,000 to just under \$500,000
4. \$500,000 to just under \$1,000,000
5. \$1,000,000 +
99. Don't know/prefer not to say **[VOLUNTEERED] [THANK AND TERMINATE]**

QB4. In which province or territory is your farming operation located? **[DO NOT READ]**

1. Alberta
2. British Columbia
3. Manitoba
4. New Brunswick
5. Newfoundland and Labrador
6. Northwest Territories
7. Nova Scotia
8. Nunavut
9. Ontario
10. Prince Edward Island
11. Quebec
12. Saskatchewan
13. Yukon
99. Prefer not to say **[THANK AND TERMINATE]**

C. Farm Operation and Risk Management

Now, we'd like to know a bit more about your farm operation.

QC1. In 2025 what type of production contributed most to your gross farm revenue? **[DO NOT READ LIST; ACCEPT 1 RESPONSE]** *Tracking*

1. Oilseed and grain farming (for example, soybean, canola, flaxseed, mustard seed, safflower and sunflower, dried peas, dried beans, lentils, wheat, corn, rice, wild rice, or buckwheat) (1111)
2. Cattle ranching and farming (for example, cow/calf, backgrounding, feedlot) (11211)
3. Dairy cattle and milk production (11212)
4. Beekeeping (112910)
5. Forage (311119)
6. Poultry farming (1123)
7. Hog and Pig farming (11221)
8. Vegetable farming (11121)
9. Fruit farming (1113)
77. Other types of farm production (for example, greenhouse production, aquaculture, sheep and goat farming) **[INTERVIEWER TYPE IN]** _____
99. Don't know/prefer not to say **[VOLUNTEERED]**

QC2. Is any portion of your production regulated by Canada's supply management system? **New 2025**

1. Yes

- 2. No
- 99. Don't know/prefer not to say [VOLUNTEERED]

QC3. Looking ahead, what do you think will be the single most important issue facing Canadian agriculture over the next 5 years? **[DO NOT READ LIST; ACCEPT 1 RESPONSE]** *Tracking*

- 1. Production costs/input costs
- 2. Commodity prices/variable prices
- 3. Profitability/viability of farming sector/making a living/returns covering costs
- 4. Trade/international trade barriers
- 5. Tariffs
- 6. Fewer farm families/succession issues
- 7. Less farmland/farms closing
- 8. Labour shortages/availability/labour (general)
- 9. Farmers need more support/aid
- 10. Mental health/stress **New 2025**
- 11. Food labelling/legislation
- 12. Climate change impacts/natural disasters and extreme weather fluctuations (for example, floods, droughts, enough rain/moisture)
- 13. Changing consumer demand
- 14. Government intervention (policy, regulation, interference)
- 15. Public perceptions (trust, understanding)
- 16. Fertilizer emission reduction target
- 17. Environmental concerns (soil health, biodiversity, and water quality)
- 77. Other, please specify: **[INTERVIEWER TYPE IN]** _____
- 99. Don't know/Prefer not to say [VOLUNTEERED]

QC4. Looking ahead, how much better or worse off will your farm operation be in 5 years, compared to how it is now? *Tracking*

- 1. Much better off
- 2. A little better off
- 3. A little worse off
- 4. Much worse off
- 5. I don't expect any change in the next five years
- 99. Don't know/Prefer not to say [VOLUNTEERED]

QC5. What type of business risks does your farming operation face? **[DO NOT READ LIST; ACCEPT UP TO 3 RESPONSES]** *Tracking*

[INTERVIEWER NOTE, IF REQUIRED] Prompt the respondent: Are there any others?

[INTERVIEWER NOTE, IF REQUIRED] Examples could be: access to markets, increased costs, diseases or pests, or weather fluctuations

- 1. Diseases or pests (for example, mad cow, avian influenza, African Swine Fever, or crop blight)
- 2. Climate change impacts/natural disasters and extreme weather fluctuations (for example, floods, droughts)
- 3. Market price fluctuations/volatility

4. Trade barriers/Barriers to market access
5. Tariffs
6. Changing government policies and programs
7. Food safety crisis/problems
8. Contamination (for example, to ground water)
9. Increased operational/production/input costs (for example, fuel, chemicals, fertilizers, labour costs)
10. Negative public perceptions/public trust (for example, concerns about animal welfare)
11. Increased pressure from value-chain members (for example, increased sustainability demands from retailers)
12. Taxes
13. Interest rates
14. Profitability/Viability of Farming Sector/Making a Living/Returns Covering Costs
15. Fewer farm families/succession issues
16. Increasing competition
17. Marketing
18. Digitization
19. Cyber Risks
77. Other, please specify: **[INTERVIEWER TYPE IN]** _____
99. Don't know/prefer not to say **[VOLUNTEERED]**

QC6. Does your household receive off-farm income? **[READ IF NECESSARY – For example, do either you or your partner have a job off the farm that supplements your income from agricultural production?]**

Tracking

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

QC7. Is your farm organic certified or in the process of receiving organic certification? *Tracking*

1. Yes – organic certified
2. Yes – in process of obtaining organic certification
3. No/not certified organic
99. Don't Know/prefer not to say **[VOLUNTEERED]**

QC8. Focusing now on net farm business income after operating expenses, during the last five years, has the net income of your operation...? *Tracking*

1. Increased
2. Stayed the same
3. Decreased
99. Don't know/prefer not to say **[VOLUNTEERED]**

QC9. In the past year, has domestic demand increased, decreased or stayed the same for your products?
New 2025

1. Increased
2. Stayed the same
3. Decreased
99. Don't know/prefer not to say **[VOLUNTEERED]**

D. Regulatory Burden

QD1. In general, have the regulatory requirements (for example, red tape) that your farm must follow increased, decreased or stayed the same? **New 2025**

1. Increased
2. Stayed the same
3. Decreased
99. Don't know/prefer not to say **[VOLUNTEERED]**

QD2. To what extent do you agree with the following statement: 'The current regulatory requirements are a significant burden on my farming operation.' **New 2025**

1. Strongly agree
2. Agree
3. Neutral
4. Disagree
5. Strongly disagree
99. Don't know/prefer not to say **[VOLUNTEERED]**

[IF QD2=1 or 2 ASK] QD3. Which specific regulations do you find most challenging? **[DO NOT READ LIST; ACCEPT 2 RESPONSES]** **New 2025** **[INTERVIEWER NOTE, IF REQUIRED]** Examples could be: **labour, environmental, food safety, import/export requirements**

1. Food safety standards (such as, Safe Food for Canadians Regulations, traceability requirements, licensing)
2. Pesticide and chemical use (such as, Pest Control Products Act, Health Canada approvals)
3. Fertilizer use and storage (such as, Fertilizers Act, CFIA regulations)
4. Animal health and welfare (such as, Health of Animals Act, livestock ID, transport regulations)
5. Environmental protection (such as, Canadian Environmental Protection Act, water use, waste management)
6. Labour standards (such as, employment standards, Temporary Foreign Worker Program)
7. Workplace health and safety (such as, provincial Occupational Health and Safety laws)
8. Packaging, labeling, and marketing requirements (such as, CFIA, Health Canada labeling, organic certification)
9. Import/export requirements (such as CFIA permits, documentation, inspections for exporting or importing products or animals)
10. Transportation regulations (such as, regulations around transporting farm goods, hazardous materials)
11. Animal feed regulations (such as Feeds Act, ingredient approval and labeling)

77. Other, please specify: **[INTERVIEWER TYPE IN]**
 99. Don't know/prefer not to say **[VOLUNTEERED]**

E. Emergency Management

QE1. Which of the following emergencies has your farming operation experienced in the last two years?
[RANDOMIZE] [READ LIST AND CHECK ALL THAT APPLY] *Tracking 2023*

1. Wildfire
2. Flood/Excess precipitation
3. Hurricane
4. Animal disease
5. Plant disease
6. Cybersecurity attack
7. Drought
99. None **[VOLUNTEERED] [EXCLUSIVE]**

QE2. What actions, if any, have you taken to manage or plan for the emergency risks that your farm operation may face? Have you implemented... **[RANDOMIZE] [READ LIST AND CHECK ALL THAT APPLY]**
Tracking 2023

1. Biosecurity measures (plant/animal disease)
2. Traceability system
3. Back-up power generation/infrastructure enhancement
4. Environment and/or sustainability measures
5. Animal welfare measures
6. Participation in a business risk management program offered by government
7. An Emergency Plan that outlines procedures to take in an emergency
77. Other, please specify: **[INTERVIEWER TYPE IN] [VOLUNTEERED]**
99. None **[VOLUNTEERED] [EXCLUSIVE]**

G. Cybersecurity and Digital Agriculture

Now we are going to talk specifically about cybersecurity, cyber incidents and your use of technology.

QG1. Has your farming operation ever experienced a cyber incident, such as an email or text scam, a computer virus, identity theft, or a social media hack? *Tracking 2023*

1. Yes
2. No
99. Don't know/prefer not to say **[VOLUNTEERED]**

QG2. How prepared is your farming operation to face a cyber incident? **[READ LIST]** *Tracking 2023*

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

QG3. Which of the following digital agriculture technologies do you currently use as part of your farming operation? **[READ LIST] [DO NOT READ STATEMENTS IN BRACKETS UNLESS THERE IS IMPLIED NEED TO OR RESPONDENT ASKS FOR CLARIFICATION] New 2025**

- A. Automation and Robotics (such as, Autonomous Tractors and Implements (GPS-Guided Auto-Steer), Robotic Harvesters & Packers)
 - B. Data Analytics and AI (such as, Yield Prediction Modeling, Automated Pest and Disease Identification)
 - C. Farm Management Software (FMS) (such as, Financial and Inventory Tracking Software, Animal Production & Feed Conversion Tracking)
 - D. Remote Sensing (such as, Rangeland Forage Biomass Estimation, Real-Time Plant Nutrient Analysis)
 - E. Sensors and Monitoring (such as, Soil Moisture Sensors, Electronic Ear Tags & Collars)
 - F. Variable Rate Technology (VRT) (such as, Variable Rate Fertilizer (VRF), Variable Rate Feeding (Precision Feeding))
 - G. Precision Data Collection (such as, Grid or Zone Soil Sampling, Automated Milk Quality Analyzers)
- 1. Currently using
 - 2. Not currently using, and unlikely to invest in the future
 - 3. Not currently using, but would like to invest in the future
 - 4. Does not apply to my operation
 - 99. Don't know/prefer not to say **[VOLUNTEERED]**

QG4. What barriers, if any, are there to increasing the use of digital agriculture technologies on your farming operation? **[DO NOT READ LIST, MULTIPLE RESPONSE]? New 2025**

- 1. No barriers **[EXCLUSIVE]**
- 2. Broadband and connectivity limitations
- 3. Limited access to digital agriculture training
- 4. Financial constraints
- 5. Lack of familiarity
- 6. Lack of interest
- 7. Unproven benefits
- 8. Lack of time to implement
- 9. Level of risk for the return on investment
- 10. Lack of technical expertise
- 11. Data concerns (Privacy, Ownership, and Security)
- 12. Lack of Interoperability and compatibility
- 77. Other, please specify: **[INTERVIEWER TYPE IN] [VOLUNTEERED]**
- 99. Don't know/prefer not to say **[VOLUNTEERED]**

H. International Trade

Now we'd like to hear a bit about your international business strategy.

QH1. How important, if at all, do you feel diversification of markets is for the growth of the Canadian agricultural sector? *Tracking 2018*

1. Very important
2. Moderately important
3. Slightly important
4. Not important at all
99. Don't know/prefer not to say **[DO NOT READ]**

QH2. How concerned, if at all, are you about the current state of international trade as it relates to Canada's agricultural sector? **New 2025**

1. Not at all concerned
2. Slightly concerned
3. Somewhat concerned
4. Moderately concerned
5. Very concerned
99. Don't know/Prefer not to say **[VOLUNTEERED]**

QH3. Canada, the United States and Mexico will be undergoing a review of the Canadian United States Mexico Agreement known as CUSMA. Do you think the outcome of these trade negotiations will be favourable to your farming operation? **New 2025**

1. Not at all favourable
2. Somewhat favourable
3. Favourable
4. Very favourable
5. Do not think CUSMA will impact their farm **[VOLUNTEERED]**
98. Don't know **[VOLUNTEERED]**
99. Prefer not to say **[VOLUNTEERED]**

QH4. Are any of your farm's products sold internationally? **New 2025**

1. Yes
2. No **[IF "No" SKIP TO QH10]**
98. Don't know **[IF DK SKIP TO QH10]**
99. Prefer not to say **[VOLUNTEERED] [SKIP TO QH10]**

[IF QH4 = 1 ASK] QH5. Which, if any, of these markets are your farm's products sold to? Are any of your farm's products sold to:

[RANDOMIZE] [READ LIST AND CHECK ALL THAT APPLY] New 2025

1. United States
2. China

1. Yes
2. No
98. Prefer not to say **[VOLUNTEERED]**
99. Don't know **[VOLUNTEERED]**

[IF QH5 = 1 “U.S.” ASK] QH6. Please indicate the extent to which you agree or disagree with the following statement: The recent tariffs imposed by the United States have negatively impacted my farming operation. **New 2025**

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree
99. Don't know/prefer not to say **[VOLUNTEERED]**

[IF QH6 = 1 or 2 ASK] QH7. What have been the specific consequences of these tariffs on your farming operation? **[DO NOT READ LIST; ACCEPT 2 RESPONSES]** **New 2025**

1. Less products sold
2. Products sold for a lower price
3. Unsold products (food loss)
4. Reduced employees (layoffs)
5. Inputs/products are more expensive to purchase for the farm
6. Reduced investment
7. Diversifying products
8. Mental health/stress
77. Other, please specify: **[INTERVIEWER TYPE IN]**
99. Don't know/prefer not to say **[VOLUNTEERED]**

[IF QH5 = 1 “China” ASK] QH8. Please indicate the extent to which you agree or disagree with the following statement: The recent tariffs imposed by China have negatively impacted my farming operation. **New 2025**

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree
99. Don't know/prefer not to say **[VOLUNTEERED]**

[IF QH8 = 1 or 2 ASK] QH9. What have been the specific consequences of these tariffs on your farming operation? **[DO NOT READ LIST; ACCEPT 2 RESPONSES]** **New 2025**

1. Less products sold
2. Products sold for a lower price
3. Unsold products (food loss)
4. Reduced employees (layoffs)
5. Inputs/products are more expensive to purchase for the farm
6. Reduce investment
7. Diversifying products
8. Mental health/stress
77. Other, please specify: **[INTERVIEWER TYPE IN]**

99. Don't know/prefer not to say **[VOLUNTEERED]**

J. Labour Market

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

QJ1. In the past 2 years, have you experienced any labour market challenges? (For example, recruiting staff or training.) *Tracking*

1. Yes
2. No

99. Don't know/prefer not to say **[VOLUNTEERED]**

QJ2. **[IF QJ1=1 ASK]** What labour market challenges have you faced? **[DO NOT READ LIST; ACCEPT UP TO 3 RESPONSES]** *Tracking*

1. Recruiting/attraction of low skilled/low wage staff
2. Recruiting/attraction of high skilled/high wage staff
3. Limited ability to provide training for new or existing staff
4. Access to staff transportation to farm/operation
5. Access to staff housing
6. Retaining existing staff
7. Limited budget to provide competitive wages and benefits
77. Other, please specify: **[INTERVIEWER TYPE IN]**
78. Don't know/prefer not to say **[VOLUNTEERED]**

QJ3. In the last year, did you employ any temporary foreign workers? *Tracking 2023*

1. Yes
2. No

99. Don't know/prefer not to say **[VOLUNTEERED]**

K. AAFC Initiatives

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

QK1. Have you seen, heard, or read anything about each of the following programs or initiatives?

[RANDOMIZE] [READ LIST AND CHECK ALL THAT APPLY] *Tracking 2023*

[DO NOT READ STATEMENTS IN BRACKETS UNLESS THERE IS IMPLIED NEED TO OR RESPONDENT ASKS FOR CLARIFICATION]

1. Sustainable Canadian Agricultural Partnership *(A \$3.5 billion five-year investment by governments to strengthen and grow Canada's agriculture and agri-food sector)* *Tracking*
2. AgriStability *(Provides support to manage large farming income declines)*
3. AgriInvest *(Helps manage risk and small farming income declines)*

4. AgriInsurance (*Provides cost-shared insurance for natural hazards*)
5. AgriRecovery (*Disaster relief framework, disaster event assessments, development of initiatives*)
6. AgriMarketing (*Aims to increase and diversify exports to global markets*) **New 2025**
7. Advance Payment Program (*Provides low-interest cash advances on the value of eligible agricultural products*)
8. AgriInnovate Program (*Provides repayable contributions to incentivize targeted commercialization, demonstration and/or adoption of commercial-ready innovative technologies*)
9. Farm Debt Mediation Service (*Offers free financial support for farmers, such as financial counselling and mediation, to help those who are having difficulties meeting their financial obligations*) **New 2025**
10. Agricultural Clean Technology Program (*Adoption or Research and Innovation Streams*)
11. Agricultural Climate Solutions – On-Farm Climate Action Fund (*Supports farmers in adopting beneficial management practices that store carbon and reduce greenhouse gases*)
12. Youth Employment and Skills Program (*provides funding to projects that employ youth and youth facing barriers*) **New 2025**
98. I haven't heard of any of these programs **[VOLUNTEERED]**
99. Don't know/prefer not to say **[VOLUNTEERED]**

QK2. Have you applied to any Agriculture and Agri-Food Canada programs for funding or support?
[Interviewer note: examples were just mentioned in previous question] New 2025

1. Yes
2. No
99. Don't know/prefer not to say **[VOLUNTEERED]**

[IF QK2=2 ASK] QK3. Why have you not applied for Agriculture and Agri-Food Canada programs?
[DO NOT READ LIST] New 2025

1. Application too time consuming
2. Application is too complicated
3. Application too costly
4. Not eligible
5. Alternate avenues of assistance
6. Applied to provincial/territorial programs
7. Do not need government support
77. Other, please specify: **[INTERVIEWER TYPE IN]**
99. Don't know/prefer not to say **[VOLUNTEERED]**

QK4. In the last year, have you visited the Agriculture and Agri-Food Canada website looking for information on programs or services? **[DO NOT READ LIST] New 2025**

1. Yes
2. No
99. Don't know/prefer not to say **[VOLUNTEERED]**

QK5. **[IF QK4=1 ASK]** How easy or difficult was it for you to find the agricultural information you were looking for on the Agriculture and Agri-Food Canada website? **New 2025**

1. Very easy

2. Somewhat easy
3. Neither easy nor difficult
4. Somewhat difficult
5. Very difficult
99. Don't know/Prefer not to say **[VOLUNTEERED]**

QK6. **[IF QK1=1 ASK]** What is your impression of the Sustainable Canadian Agricultural Partnership?
Tracking

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

QK7. **[IF QK1=1 ASK]** How familiar are you with programming and services available under the Sustainable Canadian Agricultural Partnership? *Tracking*

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

L. Information Sources and Interactions with AAFC

The next few questions ask about your experience interacting and communicating with Agriculture and Agri-Food Canada.

QL1. Which of the following sources of information do you rely on most to make decisions on your farm? **[RANDOMIZE CHECK ALL THAT APPLY] New 2025**

1. An agrologist or other advisor
2. Industry association
3. Podcast
4. Family, friends, neighbours or other producers
5. An equipment or supply vendor
6. Social media
7. Government of Canada website
8. Online search (for example, Google)
9. Artificial Intelligence tools such as ChatGPT
77. Other, please specify: **[INTERVIEWER TYPE IN]**
99. Don't know/prefer not to say **[VOLUNTEERED]**

QL2. Which social media platforms do you use regularly for business?
[DO NOT READ] New 2025

1. Facebook
2. X, formerly known as Twitter
3. LinkedIn
4. YouTube
5. Instagram
6. None [EXCLUSIVE]
77. Other, please specify: [INTERVIEWER TYPE IN]
99. Don't know/prefer not to say [VOLUNTEERED]

QL3. Are you aware of any of AAFC's social media channels (such as, LinkedIn, Facebook, Instagram, X, formerly known as Twitter, YouTube?) [DO NOT READ LIST] *New 2025*

1. Yes
2. No
99. Don't know [VOLUNTEERED]

QL4. How would you prefer to be informed about the latest agricultural news and developments from AAFC? [RANDOMIZE, ACCEPT UP TO THREE ANSWERS] *New 2025*

1. Direct mail (Canada Post)
2. Email
3. Social media (such as Facebook, X formerly known as Twitter, LinkedIn, Instagram and YouTube)
4. AAFC website
5. Digital newsletter (such as Agri Info)
6. First Sixteen Podcast
7. None of these [VOLUNTEERED]
77. Other, please specify: [INTERVIEWER TYPE IN] [VOLUNTEERED]
99. Don't know/prefer not to say [VOLUNTEERED]

M. Demographics

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

Agriculture and Agri-food Canada is committed to the ongoing collection of Gender Based Analysis Plus data to inform the design and delivery of policies and programs to better support sector participation for all.

QM1. What is your gender? [ASK OPEN AND RECORD ON LIST] *Tracking 2023*

1. Man
2. Woman
77. Or please specify [INTERVIEWER TYPE IN]
99. Don't know/Prefer not to say [VOLUNTEERED]

[INTERVIEWER NOTE]: If required, read:

- Gender refers to an individual's personal and social identity as a man (or a boy), a woman (or a girl), or a person who is not exclusively a man (or a boy) or a woman (or a girl), for example, non-binary, agender, gender fluid, queer or Two-Spirit.
- Gender is the standard variable, rather than sex, and results are reported for men, women, and non-binary people.

QM2. Do you consider yourself to be an Indigenous person, that is, First Nations (North American Indian), Métis or Inuk (Inuit)? **[DO NOT READ LIST]** *Tracking*

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

QM3. A person in a racialized group is someone (other than an Indigenous person as asked above) who is non-white in colour/race, regardless of place of birth. Are you a member of a racialized group?
Tracking 2023

1. Yes
2. No
99. Don't know/prefer not to say **[VOLUNTEERED]**

QM4. Are you a person with a disability*?

1. Yes
2. No
98. Don't know **[VOLUNTEERED]**
99. Prefer not to answer **[VOLUNTEERED]**

[INTERVIEWER NOTE]: If required, read:

* A person with a disability is a person who has a long-term or recurring impairment (such as vision, hearing, mobility, flexibility, dexterity, pain, learning, developmental, memory or mental health-related) which limits their daily activities inside or outside the home (such as at school, work, or in the community in general).

QM6. What language do you speak most often at home? **[READ LIST AND ACCEPT ONE RESPONSE][IF NEEDED: Ask respondents to indicate more than one language only if they are spoken equally at home]**

1. English
2. French
77. Other, please specify: **[INTERVIEWER TYPE IN]**
99. Prefer not to answer **[VOLUNTEERED]**

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