ENVIRONICS RESEARCH GROUP

Strategic Issues Survey Wave 3

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Table of Contents

Executive Summary

Introduction

In 2010, Agriculture and Agri-Food Canada (AAFC) commissioned Environics Research Group to conduct surveys of agricultural producers, agricultural associations, and the general public, on strategic issues related to matters under AAFC's mandate. The surveys will track opinions from previous waves of research conducted in 2007 and 2009.

The specific objectives of the research are:

- provide AAFC with up-to-date tracking data on marketing Canadian products, agricultural programming, sustainability, perceptions of agricultural sector in the Canadian economy, governmental roles, labelling and certification of products, perceptions of science and innovation in the field, health and safety of products;
- explore emerging issues such as domestic branding, livestock insurance and a national food policy;
- help identify specific areas where more in-depth, follow-up research with specific segments might be required.

The information from the public opinion research will:

- provide AAFC with information on its key business priorities and related issues, and how the perceptions and attitudes may have shifted since previous waves of research conducted in 2007 and 2009;
- be used in the planning and development of the next generation of Growing Forward, Canada's agriculture and agri-food policy, as well as all major AAFC initiatives;
- be used in the implementation of Growing Forward strategies as well as other major AAFC initiatives and communications activities; and
- help guide AAFC in further developing its marketing and communications objectives, measuring the effectiveness of marketing and communication activities and analyzing market segment information for marketing and communication purposes.

Three surveys were conducted:

General public – A telephone survey of 1,052 Canadians, 18 years of age or older, who are the decision maker or share the decision-making in the household, and who are not currently participating in farming or ranching, was conducted from February 1 to 26, 2011.

Producers – A telephone survey of 2,000 producers, who hold or share primary responsibility for making decisions regarding their farm operations, was conducted from January 25 to March 17, 2011.

Agricultural associations – An online survey of 85 agricultural association executives was conducted from February 14 to March 4, 2011.

A number of questions were common to all three surveys. As well some of the questions asked in the new surveys were asked in previous surveys of producers, the general public, and associations. The cost of this research was at $199,929.49 (HST included).

Summary of Key Findings

Survey of the General Public

The key findings of the survey of the general public are:

Views about agriculture

- Top-of-mind, economic or financial issues are the most frequently mentioned issue of concern, cited by almost three in ten Canadians (28%). However, economic issues are much less likely to be mentioned by the general public than by producers or associations; one-quarter of Canadians do not know what is the most important issue facing agriculture.
- When asked at the end of the survey what is the most important issue facing agriculture, mentions of economic issues and food safety issues increase; the number without an opinion falls to 10 percent.
- Although agriculture is seen as a modern industry by a majority of Canadians, most would not recommend it as a career.
- Over the past six months, the topics food safety, food product labeling, and food quality have been noticed by over 70 percent of the public, followed by global food demand and access to food in Canada and globally, noticed by over 60 percent.

The environment

- There is no consensus among Canadians on the definition of “locally grown”; 44 percent say “within 100 km of where they live”; the remainder say either from their province or from within Canada.
- Of five environmental priorities, the top priority for Canadians (almost four in ten) is water quality followed far behind by soil conservation, climate change, and others.
- Almost half of Canadians (47%) think agricultural activities have a positive impact on the environment; over one-third think they have a negative impact.
- A slim majority of Canadians (53%) think that producers are taking appropriate actions to minimize the impact of their activities on the environment.

Scientific research

- The highest objectives for scientific research are helping to promote food safety (63%) and developing production methods that minimize animal and plant disease outbreaks (60%). Majorities also assign a high priority to developing health benefits of food products (58%), and to minimizing the impact of agricultural activities on the environment (56%).
- Smaller proportions, more than four in ten, place a higher priority on developing new uses for agricultural crops or products and improving productivity on farms.
- Fewer than four in ten assign a high priority to developing plants so that they are more resistant to disease, and developing plants so that they consume less water.

Consumer preferences

- When buying food products, Canadians most commonly report checking the expiry date (87% always or often) and the price (77%). About six in ten each check whether it is a Canadian product (64%), nutrition facts table (63%), ingredient list (62%) and the country of origin of the product (58%). Half of Canadians (51%) check to see whether it is locally grown, meaning grown within 100 kilometres of where they live. Four in ten check to see if it is an organic product, and three in ten check for allergen information.
- Many Canadians say they make some effort to include locally grown products in their weekly purchases, including 36 percent who do this to a great extent.
- A large majority of Canadians (91%) place at least some importance on having access to a wide variety of food such as coffee, bananas or nuts, including over half (54%) who think this is very important.

Interprovincial issues

- When asked if they were aware interprovincial trade laws governing agriculture and food, more than four in ten (44%) say they are while over half (56%) say they are not.
- An overwhelming majority of Canadians see some importance in local businesses, such as a vineyard, to be able to ship goods such as wine anywhere in Canada. A total of almost nine in ten (87%) say it is important, including two-thirds (66%) who think it is very important.

Food safety

- A huge majority of Canadians (89%) are confident that food produced in Canada is safe, including one-half (51%) who are very confident.
- Only two in ten (18%) are very confident in the safety of imported food sold in Canada.
- Restaurants (87%) and food processing and packaging plants (86%) are most often seen as the places where food contamination is very or somewhat likely to occur.

Policies

- Like producers and associations, Canadians overwhelmingly support the idea of a national food policy; unlike producers and associations, the highest priority items for Canadians for a national food policy are promoting conservation of resources and increasing access to affordable and nutritious food in Canada.
- When it comes to 16 wide-ranging priorities for agriculture, the top priority for Canadians is focusing on food safety initiatives, followed by promoting Canada as a world leader in food production and minimizing the impact of agricultural activities on the environment.
- Most Canadians favour providing direct government financial support to farmers who are unable to make a sustainable living through farming.

Survey of Producers

The key findings of the survey of producers are:

General concerns and situations

- Economic concerns remain by far the most important issue facing Canadian agriculture today, according to 69 percent of producers; these concerns include production costs, commodity prices, and sector viability.
- Economic issues are also seen to be the most important issue facing Canadian agriculture over the next five years, although slightly less important (56%).
- When asked specifically, the most important situations faced by producers over the past two years are increased input costs ,which have been experienced by almost all producers (92%) followed by market fluctuations/volatility, exchange rates/dollar fluctuations, and international factors; however all these are somewhat less important than they were in the 2009 survey.

The environment

- Of six environmental priorities, the top priorities for producers are soil conservation (32%) and water quality (31%).
- Many producers (58%) think agricultural activities have a positive impact on the environment, and almost all (83%) think that producers are taking appropriate actions to minimize the environmental impact of agricultural activities.

Scientific research

- The highest objective for scientific research for producers is developing production methods that minimize animal and plant disease outbreaks (58%). Majorities also assign a high priority to developing plants so that they are more resistant to disease (53%), helping to promote food safety (53%), and developing new uses for agricultural crops or products (52%).

Food safety

- More than nine in ten producers (93%) are confident that food produced in Canada is safe, including seven in ten (71%) who are very confident and one-quarter (22%) who are somewhat confident.

- Producers are divided as to their confidence in the safety of imported food sold in Canada. Half (50%) are confident that imported food sold in Canada is safe, but this includes only one in ten (10%) who are very confident and four in ten (40%) who are somewhat confident.

Policies

- Producers overwhelmingly support (90%) the idea of a national food policy.

- The priority items for a national food policy, for over eight in ten producers, are ensuring the profitability of the sector, developing a long-term plan for the sector, and promoting the conservation and protection of resources.

- When it comes to 16 wide-ranging priorities for agriculture, the top interests of over eight in ten producers are to promote Canada as a world leader in food production, to increase the profitability of the sector, to help open up new markets for Canadian food products, and to expand exports of Canadian food products. The lowest priority is to expand imports of food products.

Programs

- Half of producers (51%) say they are currently using government programs in their farming operation; the largest of which are AgriStability programs (used by 51% of those who are using programs) followed by AgriInvest (used by 41%).

- Producers are divided as to whether they are more likely (35%) or less likely (38%) to be applying for government programs today as compared to two years ago.

Survey of Agricultural Associations

The key findings of the survey of associations are:

General concerns and interests

- Associations are just as likely as producers to see economic concerns as the most important issue facing Canadian agriculture today; however they and their members are relatively more concerned than producers themselves, about government regulation and support as issues.

- Virtually all associations regularly track federal government decisions, policies and programs on behalf of their members; the vast majority also track food safety and quality, sector competitiveness, trade issues, provincial decisions, policies and programs, sector innovation, agriculture and the environment, and research and development.

- Four in ten associations have programs geared to young farmers.

- Association executives are almost twice as likely to think the net farm business income of producers in their sector will increase rather than decrease over the next five years.

- Nine in ten say their agricultural sector has faced increased input costs such as fuel, chemicals, fertilizers, and labour costs over the past two years. Between seven and eight in ten say their sector has confronted changing government policies and programs, exchange rates and fluctuations in the dollar, market price fluctuations on volatility, international factors such as trade barriers, foreign subsidies or globalization and changes to market access.

The environment

- When asked to choose the one environmental priority for agriculture from a pre-defined list, association executives select water quality (31%), followed by climate change (21%) and soil conservation (19%).

- An overwhelming majority of association executives (74%) believe agricultural activities have a positive impact on the environment.

- When asked to assess the actions of agricultural producers, almost nine in ten (87%) think they are taking the appropriate actions to minimize the impact of their agricultural activities on the environment.

Scientific research

- The highest objectives for scientific research are improving productivity on farms (67%), developing health benefits of food products (61%) and developing production methods that minimize animal and plant disease outbreaks (61%).

Food safety

- Virtually all association executives (99%) express overall confidence in the safety of food produced in Canada, including 85 percent who express great confidence.

- In contrast, 60 percent express overall confidence in the safety of imported food sold in Canada but only a small number (13%) express great confidence.

Policies

- Like producers, associations overwhelmingly support (95%) the idea of a national food policy.

- Like producers, the priority items for a national food policy, for over eight in ten associations, are ensuring the profitability of the sector and developing a long-term plan for the sector.

- When it comes to 16 wide-ranging priorities for agriculture, the top priority for associations is investing in scientific research in agriculture, followed by increasing the profitability of the sector, helping to open up new markets for Canadian food products, developing a national agricultural policy, and promoting Canada as a world leader in food production. The lowest priority is to expand imports of food products.

Sommaire

Introduction

En 2010, Agriculture et Agroalimentaire Canada (AAC) a mandaté Environics Research Group pour réaliser des sondages auprès des producteurs, des associations agricoles et du grand public sur des questions stratégiques reliées au mandat d'AAC. Les sondages permettront d'effectuer un suivi relativement aux opinions obtenues dans le cadre des phases précédentes de l'étude, menées en 2007 et en 2009.

La recherche a pour objectifs précis :

- de fournir à AAC des données de suivi à jour sur la commercialisation de produits canadiens, les programmes agricoles, la durabilité, les perceptions à l'égard du secteur agricole dans l'économie canadienne, les rôles gouvernementaux, l'étiquetage et la certification de produits, les perceptions à l'égard de la science et de l'innovation dans le domaine, la santé et la salubrité des produits;
- d'explorer les enjeux émergents tels que la promotion de l'image de marque, l'assurance du bétail et la politique alimentaire nationale;
- de contribuer à identifier certains domaines précis pour lesquels une enquête de suivi plus approfondie incluant des segments spécifiques peut être nécessaire.

Les renseignements obtenus dans le cadre de la recherche sur l'opinion publique :

- fourniront des renseignements à ACC sur ses principales priorités opérationnelles et sur les sujets connexes ainsi que sur l'évolution des attitudes et des perceptions depuis les phases précédentes de l'étude, menées en 2007 et en 2009;
- seront utilisés pour la panification et l'élaboration de programmes futurs de *Cultivons l'avenir*, la nouvelle politique agricole et agroalimentaire canadienne ainsi que d'autres initiatives majeures d'AAC;
- seront utilisés dans la mise en œuvre de *Cultivons l'avenir* ainsi que pour d'autres activités et initiatives de communication majeures d'AAC;
- serviront à guider AAC dans l'élaboration de ses objectifs en matière de marketing et de communication, en mesurant l'efficacité des activités de marketing et de communication et en analysant les données relatives aux segments du marché à des fins de communication et de marketing.

Trois sondages ont été menés auprès des groupes suivants :

Le grand public – Un sondage téléphonique a été réalisé du 1er au 26 février 2011 auprès de 1 052 Canadiens âgés de 18 ans et plus qui prennent part aux décisions au sein de leur ménage et ne participent pas actuellement aux activités d'agriculture ou d'élevage.

Les producteurs agricoles – Un sondage téléphonique a été réalisé du 25 janvier au 17 mars 2011 auprès de 2 000 producteurs agricoles qui détiennent ou partagent la principale responsabilité des décisions relatives à leur exploitation agricole.

Les associations du secteur agricole – Un sondage en ligne a été réalisé du 14 février au 4 mars 2011 auprès de 85 cadres d'associations du secteur agricole.

Beaucoup de questions étaient communes aux trois sondages. En outre, certaines questions posées dans le cadre des nouveaux sondages avaient été posées lors des sondages précédents menés auprès des producteurs agricoles, du grand public et des associations.

Résumé des conclusions principales

Sondage mené auprès du grand public

Voici les principales conclusions tirées du sondage mené auprès du grand public :

Points de vue à l'égard de l'agriculture

- Les enjeux préoccupants les plus fréquemment cités sont les questions économiques, mentionnées par presque trois Canadiens sur dix (28 %). Toutefois, les questions économiques sont beaucoup moins susceptibles d'être mentionnées par le grand public que par les producteurs ou les associations. Le quart des Canadiens ne connaissent pas l'enjeu le plus important auquel l'agriculture est confrontée.

- Lorsqu'interrogés à la fin du sondage sur l'enjeu le plus important auquel l'agriculture est confrontée, les répondants sont plus nombreux à mentionner les enjeux reliés à l'économie et à la salubrité des aliments; le nombre de ceux qui n'émettent pas d'opinion chute quant à lui à dix pour cent.

- Bien que la majorité des Canadiens voient l'agriculture comme étant un secteur industriel moderne, la plupart ne recommanderaient pas une carrière dans ce domaine.

- La salubrité des aliments, l'étiquetage des produits alimentaires et la qualité des aliments sont des sujets ayant été remarqués par plus de 70 pour cent du public au cours des six derniers mois. La demande alimentaire mondiale et l'accès à la nourriture au Canada et à l'échelle mondiale sont des sujets ayant pour leur part été remarqués par plus de 60 pour cent du public.

L'environnement

- Aucun consensus n'émerge chez les Canadiens quant à la définition de « produits issus d'une production locale »; 44 pour cent répondent « dans un rayon de 100 kilomètres d'où ils habitent »; les autres répondent « de leur province » ou « du Canada ».
- Parmi cinq priorités environnementales, la qualité de l'eau occupe le premier rang chez les Canadiens (presque quatre sur dix), loin devant la conservation des sols, les changements climatiques et d'autres priorités.
- Près de la moitié des Canadiens (47 %) sont d'avis que les activités agricoles ont un impact positif sur l'environnement; plus du tiers croit plutôt que ces dernières ont un impact négatif.
- Une faible majorité des Canadiens (53 %) estiment que les producteurs prennent les mesures nécessaires pour réduire l'impact de leurs activités agricoles sur l'environnement.

La recherche scientifique

- Les plus grands objectifs en matière de recherche scientifique sont de promouvoir la salubrité des aliments (63 %) et de développer des méthodes de production qui réduisent les poussées de maladie chez les plantes et les animaux (60 %). Une majorité de répondants accordent également une priorité élevée au développement de produits alimentaires bénéfiques pour la santé (58 %) et à la réduction de l'impact négatif des activités agricoles sur l'environnement (56 %).
- De moindres proportions de répondants (plus de quatre sur dix) accordent une priorité plus élevée au développement de nouvelles utilisations pour les cultures et les produits agricoles et à l'amélioration de la productivité des exploitations agricoles.
- Moins de quatre répondants sur dix accordent une priorité élevée au développement des plantes afin qu'elles soient plus résistantes à la maladie et afin qu'elles consomment moins d'eau.

Préférences des consommateurs

- Lorsqu'ils achètent des produits alimentaires, les Canadiens disent vérifier le plus souvent la date d'expiration (87 % toujours ou souvent) et le prix (77 %). Environ six répondants sur dix vérifient s'il s'agit d'un produit canadien (64 %), le tableau de valeur nutritive (63 %), la liste des ingrédients (62 %) et le pays d'origine du produit (58 %). La moitié des Canadiens (51 %) vérifient s'il s'agit d'un produit cultivé localement, c'est-à-dire à moins de 100 kilomètres de leur lieu de résidence. Finalement, quatre répondants sur dix vérifient s'il s'agit d'un produit biologique et trois sur dix examinent les renseignements relatifs aux allergies.
- Beaucoup de Canadiens disent faire des efforts pour incorporer des produits issus d'une production locale dans leurs achats hebdomadaires d'épicerie, dont 36 pour cent affirment en incorporer beaucoup.

- Une grande majorité des Canadiens (91 %) accordent au moins une certaine importance à l'accès à une grande variété d'aliments tels que le café, les bananes ou les noix, dont plus de la moitié (54 %) estime que cet accès est très important.

Questions interprovinciales

- Lorsqu'on leur demande s'ils sont au courant des lois concernant les marchés interprovinciaux qui régissent les produits agricoles et alimentaires, plus de quatre répondants sur dix (44 %) disent l'être, alors que plus de la moitié des répondants (56 %) disent de pas l'être.
- Une très grande majorité des Canadiens sont d'avis qu'il est important pour les entreprises locales, telles que les vignobles, de pouvoir expédier des produits comme du vin n'importe où au Canada. Au total, près de neuf répondants sur dix (87 %) estiment que c'est important, dont les deux tiers (66 %) affirment que c'est très important.

La salubrité des aliments

- Une très grande majorité des Canadiens (89 %) disent avoir une confiance élevée à l'égard de la salubrité des aliments produits au Canada, dont la moitié d'entre eux (51 %) se disent très confiants.
- Seulement deux répondants sur dix (18 %) se disent très confiants à l'égard de la sécurité des aliments importés vendus au Canada.
- Lorsqu'amenés à nommer des endroits où il est assez ou très probable qu'une contamination des aliments se produise, les répondants mentionnent majoritairement les restaurants (87 %) et les usines où des aliments sont transformés et emballés (86 %).

Politiques

- Tout comme les producteurs et les associations, les Canadiens appuient très fortement l'idée d'une politique alimentaire nationale; mais contrairement à ces derniers, les Canadiens estiment que la conservation des ressources et l'augmentation de l'accès à de la nourriture nutritive et abordable au Canada sont les éléments les plus prioritaires d'une politique alimentaire nationale.
- Parmi un éventail de 16 éléments prioritaires reliés au secteur agricole, se concentrer sur les initiatives relatives à la sécurité alimentaire figure en tête des priorités chez les Canadiens, devant la promotion du Canada dans le monde comme chef de file dans la production d'aliments et la réduction de l'impact des activités agricoles sur l'environnement.
- La plupart des Canadiens se prononcent en faveur de l'octroi d'un soutien financier direct de la part des gouvernements aux agriculteurs incapables de réaliser des revenus durables de l'agriculture.

Sondage mené auprès des producteurs

Voici les principales conclusions tirées du sondage mené auprès des producteurs :

Les situations et les préoccupations générales

- Selon 69 pour cent des producteurs, les préoccupations économiques demeurent de loin l'enjeu le plus important auquel l'agriculture canadienne est confrontée aujourd'hui; ces préoccupations comprennent les coûts de production, le prix des marchandises et la viabilité du secteur.
- De façon un peu moins importante (56 %), les questions économiques sont également perçues comme l'enjeu le plus important auquel sera confrontée l'agriculture canadienne au cours des cinq prochaines années.
- Lorsqu'interrogés plus précisément sur les plus importantes situations auxquelles les producteurs ont été confrontés au cours des deux dernières années, ceux-ci mentionnent l'augmentation des coûts des facteurs de production, subie par presque tous les producteurs (92 %), les fluctuations du marché ou la volatilité, le taux de change et les fluctuations de la valeur du dollar et les facteurs internationaux; toutefois, ces enjeux s'avèrent un peu moins importants qu'ils l'étaient lors du sondage mené en 2009.

L'environnement

- Parmi six priorités environnementales, celles que les producteurs ont le plus à cœur sont la conservation des sols (32 %) et la qualité de l'eau (31 %).
- Un grand nombre de producteurs (58 %) sont d'avis que les activités agricoles ont un impact positif sur l'environnement, et presque tous (83 %) estiment que les producteurs prennent les mesures nécessaires pour réduire l'impact de leurs activités agricoles sur l'environnement.

La recherche scientifique

- L'objectif le plus important en matière de recherche scientifique pour les producteurs est de développer des méthodes de production qui réduisent les poussées de maladie chez les plantes et les animaux (58 %). La majorité des répondants classent également comme étant très prioritaires le développement des plantes afin qu'elles soient plus résistantes à la maladie (53 %), la promotion de la salubrité des aliments (53 %) et le développement de nouvelles utilisations pour les cultures et les produits agricoles (52 %).

La salubrité des aliments

- Plus de neuf producteurs sur dix (93 %) se disent confiants à l'égard de la salubrité des aliments produits au Canada, dont sept sur dix (71 %) se disent très confiants et le quart des répondants (22 %) se disent passablement confiants.
- Les producteurs sont divisés quant à leur niveau de confiance à l'égard de la sécurité des aliments importés vendus au Canada. Si la moitié des répondants (50 %) s'estiment confiants à

l’égard de la sécurité des aliments importés vendus au Canada, de cette proportion, seulement un répondant sur dix (10 %) se dit très confiant et quatre sur dix (40 %) se disent passablement confiants.

Politiques

- Les producteurs appuient très fortement (90 %) l’idée d’une politique alimentaire nationale.
- S’assurer que le secteur de l’agriculture demeure rentable, développer un plan à long terme pour le secteur agricole et promouvoir la conservation et la protection des ressources constituent les éléments prioritaires d’une politique alimentaire nationale pour plus de huit producteurs sur dix.
- Parmi un éventail de 16 éléments prioritaires reliés au secteur agricole, huit producteurs sur dix ont placé en tête des priorités de faire la promotion du Canada dans le monde comme un chef de file dans la production d’aliments, d’accroître la profitabilité du secteur agricole, d’aider à ouvrir de nouveaux marchés pour les produits alimentaires canadiens et d’accroître les exportations des produits alimentaires canadiens. La plus faible priorité est accordée à l’accroissement des importations de produits alimentaires.

Programmes

- La moitié des producteurs (51 %) affirment utiliser actuellement des programmes gouvernementaux dans le cadre de leurs activités agricoles. Les programmes les plus utilisés sont Agri-stabilité (utilisé par 51 % des producteurs qui utilisent des programmes) et Agri-investissement (utilisé par 41 %).
- Les producteurs sont divisés quant à savoir s’ils sont plus susceptibles (35 %) ou moins susceptibles (38 %) aujourd’hui de faire une demande pour accéder à des programmes gouvernementaux comparativement à il y a deux ans.

Sondage mené auprès des associations agricoles

Voici les principales conclusions tirées du sondage mené auprès des associations.

Les intérêts et les préoccupations en général

- Les associations sont aussi susceptibles que les producteurs de mentionner les préoccupations économiques comme étant l’enjeu le plus important auquel l’agriculture canadienne est confrontée aujourd’hui; toutefois, les associations et leurs membres sont relativement plus préoccupés que les producteurs eux-mêmes par les questions reliées au soutien et à la réglementation des gouvernements.
- Pratiquement toutes les associations font un suivi régulier pour leurs membres au sujet des décisions, politiques et programmes du gouvernement fédéral. La grande majorité des associations effectuent également un suivi sur la salubrité et la qualité des aliments, la compétitivité dans le secteur agricole, les questions commerciales, les décisions, politiques et programmes du gouvernement provincial, l’innovation dans le secteur agricole, l’impact de l’agriculture sur l’environnement et la recherche et le développement.

- Quatre associations sur dix sont dotées de programmes ciblant les jeunes agriculteurs.
- Les dirigeants des associations sont presque deux fois plus susceptibles de penser que le revenu net moyen des producteurs agricoles de leur secteur va augmenter plutôt que diminuer au cours des cinq prochaines années.
- Neuf répondants sur dix affirment que leur secteur agricole a été confronté à l'augmentation des coûts des facteurs de production tels que le carburant, les produits chimiques, les fertilisants et les coûts relatifs à la main d'œuvre au cours des deux dernières années. Entre sept et huit sur dix affirment que leur secteur a été confronté aux situations suivantes : les changements dans les politiques et programmes gouvernementaux, le taux de change et fluctuations de la valeur du dollar, les fluctuations du marché ou la volatilité, les facteurs internationaux tels que les barrières commerciales, les subventions étrangères ou la mondialisation et les changements en ce qui concerne l'accès au marché.

L'environnement

- Lorsqu'amenés à identifier une seule priorité environnementale en agriculture parmi celles d'une liste déterminée, les dirigeants d'associations mentionnent en tout premier lieu la qualité de l'eau (31 %), et ensuite le changement climatique (21 %) et la conservation des sols (19 %).
- La très grande majorité des dirigeants d'associations (74 %) estiment que les activités agricoles ont un impact positif sur l'environnement.
- Lorsqu'interrogés au sujet des actions entreprises par les producteurs agricoles, près de neuf répondants sur dix (87 %) sont d'avis que les producteurs prennent les mesures nécessaires pour réduire l'impact de leurs activités agricoles sur l'environnement.

La recherche scientifique

- Les objectifs les plus importants en matière de recherche scientifique sont l'amélioration de la productivité des exploitations agricoles (67 %), le développement de produits alimentaires bénéfiques pour la santé (61 %) et le développement de méthodes de production qui réduisent les poussées de maladie chez les plantes et les animaux (61 %).

La salubrité des aliments

- Pratiquement tous les dirigeants d'associations (99 %) expriment une confiance générale à l'égard de la sécurité/salubrité des aliments produits au Canada, dont 85 pour cent se disent très confiants.
- À l'opposé, si 60 pour cent expriment une confiance générale à l'égard de la sécurité/salubrité des aliments importés vendus au Canada, seulement peu de répondants (13 %) se disent très confiants.

Politiques

- Tout comme les producteurs, les associations appuient très fortement (95 %) l'idée d'une politique alimentaire nationale.

- Comme les producteurs, huit associations sur dix estiment que s'assurer que le secteur agricole demeure rentable et développer un plan à long terme pour le secteur agricole constituent les éléments prioritaires d'une politique alimentaire nationale.

- Parmi un éventail de 16 éléments prioritaires reliés au secteur agricole, les associations ont placé en tête des priorités investir dans la recherche scientifique dans le domaine de l'agriculture. Ils mentionnent ensuite accroître la profitabilité du secteur agricole, aider à ouvrir de nouveaux marchés pour les produits alimentaires canadiens, développer une politique agricole nationale et faire la promotion du Canada dans le monde comme un chef de file dans la production d'aliments. La plus faible priorité est accordée à l'accroissement des importations de produits alimentaires.

1.0 Introduction

In 2010, Agriculture and Agri-Food Canada (AAFC) commissioned Environics Research Group to conduct surveys of the general public, agricultural producers and agricultural associations on strategic issues related to matters under AAFC's mandate. The surveys will track opinions from previous waves of research conducted in 2007 and 2009.

The specific objectives of the research are:

- provide AAFC with up-to-date tracking data on marketing Canadian products, agricultural programming, sustainability, perceptions of agricultural sector in the Canadian economy, governmental roles, labelling and certification of products, perceptions of science and innovation in the field, and health and safety of products;
- explore emerging issues such as domestic branding, livestock insurance and a national food policy; and
- help identify specific areas where more in-depth, follow-up research with specific segments might be required.

The information from the public opinion research will:

- provide AAFC with information on its key business priorities and related issues, and how the perceptions and attitudes may have shifted since previous waves of research conducted in 2007 and 2009;
- be used in the planning and development of the next generation of Growing Forward, Canada's agriculture and agri-food policy, as well as all major AAFC initiatives;
- be used in the implementation of Growing Forward strategies, as well as other major AAFC initiatives and communications activities; and
- help guide AAFC in further developing its marketing and communications objectives, measuring the effectiveness of marketing and communication activities, and analyzing market segment information for marketing and communication purposes.

Three surveys were conducted:

General public. A telephone survey of 1,052 Canadians, 18 years of age or older, who are the decision-maker or share the decision-making in the household, and who are not currently participating in farming or ranching, was conducted from February 1 to 26, 2011.

Producers. A telephone survey of 2,000 producers, who hold or share primary responsibility for making decisions regarding their farm operations, was conducted from January 25 to March 17, 2011.

Agricultural associations. An online survey of 85 agricultural association executives was conducted from February 14 to March 4, 2011.

This report presents the key findings from all three surveys, in separate sections, followed by descriptions of the methodologies used in the surveys.

A number of questions were common to all three surveys. As well, some of the questions asked in the new surveys were asked in previous surveys of producers, the general public and associations. This report presents tracking data from surveys of producers and the general public conducted in 2009, as well as tracking data from a survey of associations conducted in 2007, for relevant questions.

Presented under separate cover are the tabular analyses of each of the three surveys, presented in banner table format.

This study complies with the political neutrality requirement in article 6.2.4 of the Government of Canada's contracting policy; specifically, it contains no reference to electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

2.0 Survey of the General Public

This section of the report presents the key findings of the survey of the general public, based on a telephone survey 1,052 members of the general public, across Canada, aged 18 or over, who hold or share primary responsibility for making decisions in their household. A random survey with this sample size has a margin of error of +/- 3.0 percentage points, 19 times in 20.

The survey probed opinion about the most important issues facing agriculture in Canada today; views about agriculture as an industry; attitudes toward environmental, scientific and food safety issues facing agriculture; consumer preferences; interprovincial issues; support for a national food policy; and views about government priorities for agriculture.

Most important issue

At the beginning of the survey, members of the general public were asked their opinion as to what is the most important issue facing Canadian agriculture today (asked unprompted).

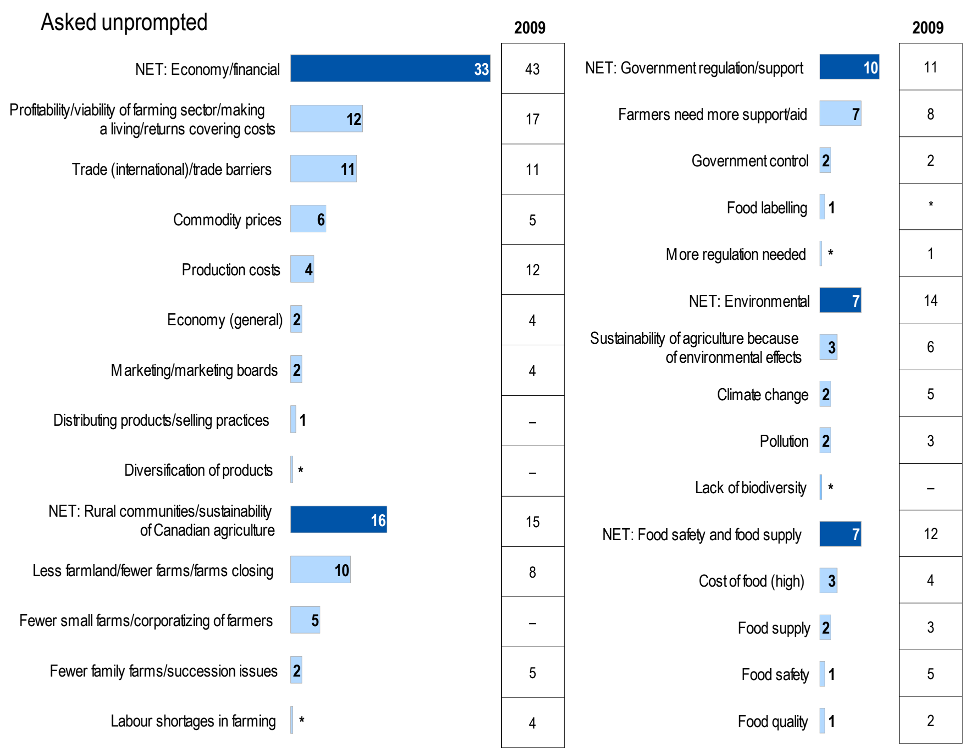
Top-of-mind, economic or financial issues are the most frequently mentioned issue of concern, cited by one-third of Canadians (33%). These encompass issues including the viability of farming (12%), trade barriers (11%), commodity prices (6%), production costs (4%) and others.

On a second tier of issues of concern are rural communities or sustainability of Canadian agriculture, mentioned by almost two in ten Canadians (16%). These concerns include mentions of less farmland and fewer farms (10%), fewer small farms and the corporatization of agriculture (5%), and others.

Smaller numbers of Canadians cite government regulation or support (10%), environmental issues (7%), food safety and food supply (7%), consumer preferences or demands (7%), agriculture-related crises or risks, such as weather (5%), and technology issues (4%). Clearly, these issues, while important to some Canadians, do not have the same urgency compared to economic or financial matters, or agricultural sustainability issues.

Q.1

Most important issue facing Canadian agriculture



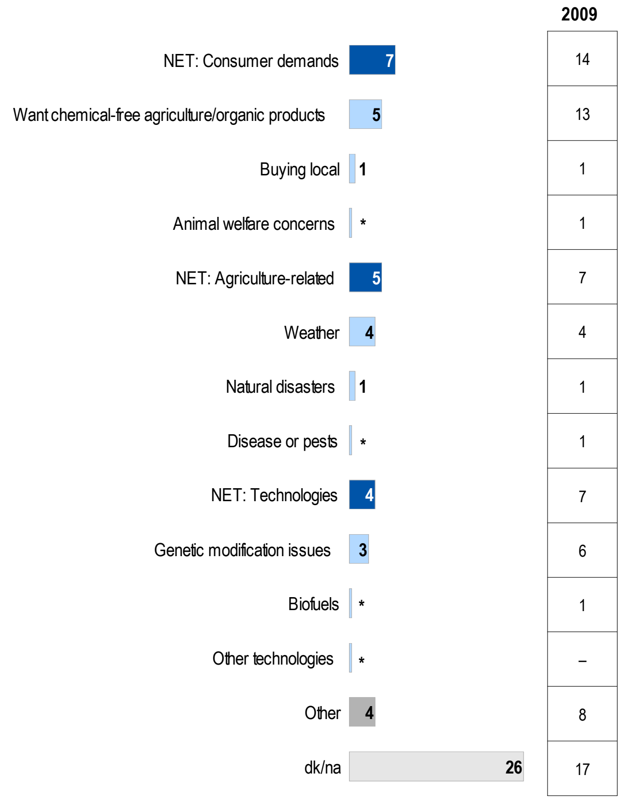
Continued…

* Less than one percent

Q.1

Most important issue facing Canadian agriculture …

continued



* Less than one percent

Although economic concerns remain high, the salience of these issues has fallen noticeably since 2009. Since 2009, there have also been declines in the proportion of Canadians who cite environmental issues, consumer preferences or demands, and food safety.

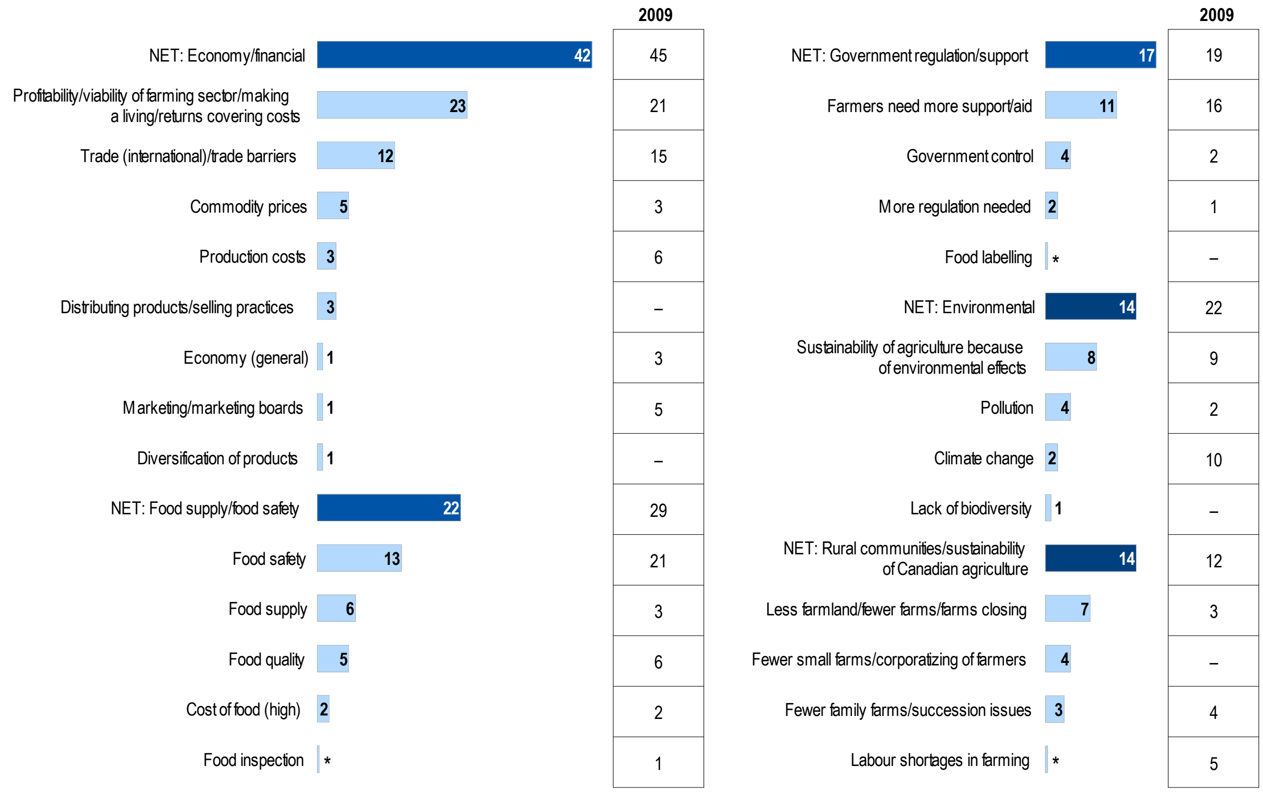
Among Canada's regions, Manitoba residents are less likely than others to mention economic or financial issues (21%). Those in Saskatchewan are less inclined to cite sustainability issues (4%), but more likely to mention agriculture-related crises or risks (21%). Environmental issues are more frequently mentioned by Quebec residents (13%). Mention of sustainability issues increases with increasing age.

At the end of the survey, Canadians were asked the same question again to see if their opinion on the most important agricultural issue had changed after responding to other questions in the survey. Economic or financial issues remained at the top of the list of the most important agricultural issues, and also grew in concern, mentioned by four in ten Canadians (42%, an increase of 9 points).

Q.24

Most important issue facing Canadian agriculture

Follow up – asked unprompted



* Less than one percent

Other issues more commonly reported at the end of the survey than at the beginning include: food supply and food safety (22%, up 15 points), government regulation or support (17%, up 7) and environmental issues (14%, up 7). The salience of rural communities or sustainability of Canadian agriculture remained relatively stable (14%), but because of the increase in importance of other issues, it dropped from second to fourth spot.

The increase in the salience of economic and financial issues is driven by increases in particularly areas of the country: Manitoba, Atlantic Canada and Ontario. Salience has grown among Canadians aged 35 to 54.

The increase in mentions of food safety and food supply has occurred in nearly all areas of the country. It has grown among those under the age of 45 (by about 20 points).

Recall of media stories and perceptions of agriculture

This section examines agriculture issues in the media and perceptions of the agriculture industry, including whether it is perceived as an old or modern industry, would be suggested as a career path for their child/child they know, and whether agricultural activities in their community are increasing, decreasing or staying the same.

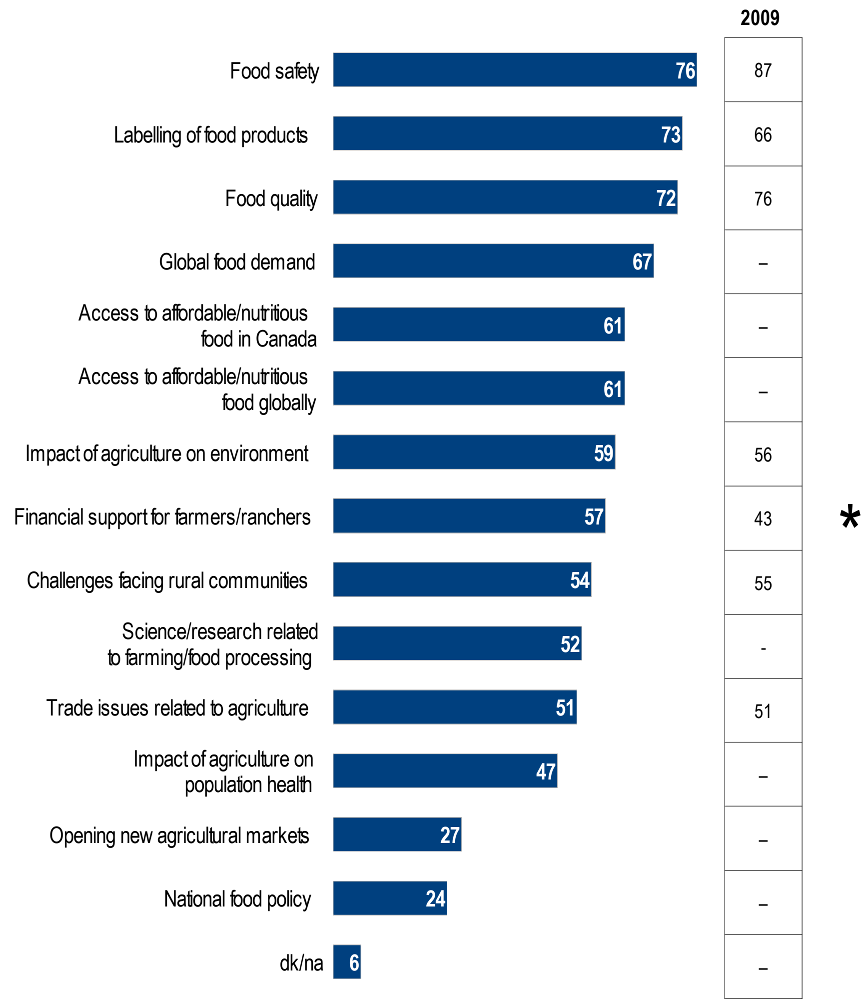
Recall of media stories. Members of the general public were read a list of topics related to agriculture, and were asked whether they had seen, heard or read any stories in the media about these topics in the last six months.

The survey finds that the topics food safety, food product labelling and food quality have been noticed by over 70 percent of the public, followed by global food demand, and access to food in Canada and globally, noticed by over 60 percent. About one-half or more recall access to affordable and nutritious food in Canada, access to affordable and nutritious food globally, the impact of agriculture on the environment, financial support for farmers or ranchers, the challenges facing rural communities, science & research related to farming or food processing, and trade issues related to agriculture.

The topics with the lowest recall are opening new agricultural markets (27%) and a national food policy (24%).

Q.2

Media stories in the last six months



* Income support for farmers or ranchers

Since 2009, recall of food safety stories has fallen. There has been an increase in recollection of food labeling, and financial support for farmers or ranchers.

Ontarians report higher than average recall of media stories relating to food safety, labelling of food products, and access to affordable and nutritious food in Canada and globally. Quebecers report higher than average recollection of the impact of agriculture on the environment, financial support for farmers or ranchers, the impact of agriculture on population health and trade issues related to agriculture.

Women are more likely than men to report recall stories about labelling of food products, and access to affordable and nutritious food in Canada, while men report higher recall of trade issues and opening new agricultural markets.

Recall of most agricultural issues is higher among those aged 55 and older, university graduates and the most affluent Canadians.

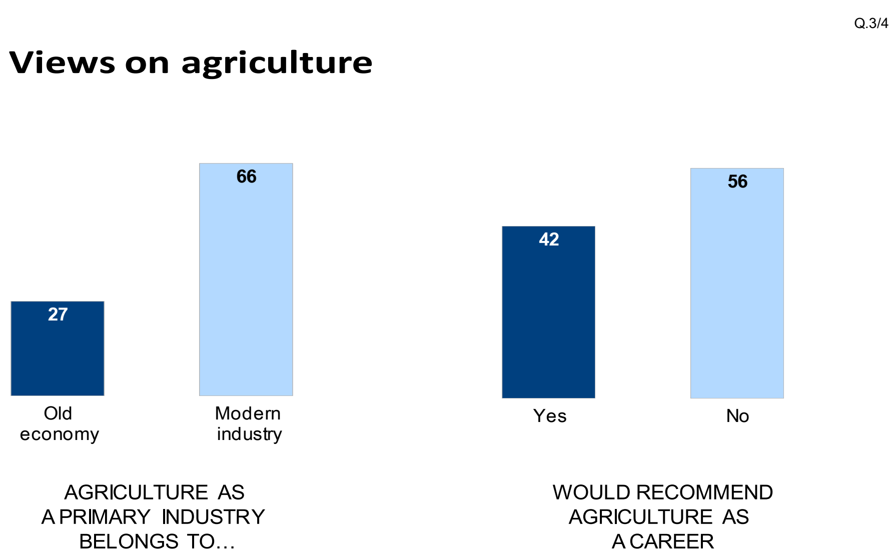
Perception of the agriculture industry. Most members of the general public have a positive perception of the agriculture industry and see it as part of the modern economy.

When presented with two views of the agriculture industry and asked which most reflects their own, two-thirds of Canadians (66%) think of agriculture as a modern industry sector with potential for future growth, while just under three in ten (27%) think of agriculture as a primary industry that is part of the old economy.

The view that agriculture is a modern industry sector is the predominant one across all regional and demographic subgroups, but is higher in Quebec and among higher educated Canadians.

Suggest farming/agriculture careers for their child/child they know. Although Canadians see the agriculture industry as modern and with a potential for future growth, most would not suggest it as career for their child or a child they know. However, a sizeable minority would suggest it as a career option.

Four in ten (42%) say they would suggest farming and agriculture career paths for their child or child they know, while a majority (56%) would not.



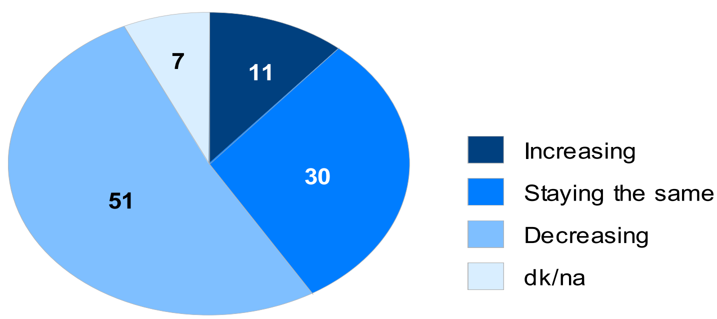
The proportion who would suggest agriculture careers for their child/child they know is higher than average in Quebec (56%), where a majority hold this view, and lower than average in Saskatchewan (30%) and British Columbia (28%). Men, those aged 18 to 34 and those with the lowest income levels are also more inclined to suggest agriculture careers.

Perceptions of agricultural activities in community. Most Canadians perceive a decline in agricultural activities in their community.

When asked to think about agricultural activities in their community, Canadians are more inclined to think these activities are decreasing (51%) rather than increasing (11%), with another three in ten who think they are staying the same (30%).

Q.5

Extent of agricultural activity in your community



There are notable differences in perceptions across the country. Majorities of Canadians in Atlantic Canada (66%), Ontario (54%) and Quebec (52%) think agricultural activities in their community are decreasing. Most Canadians in British Columbia (48%)also believe these activities are decreasing. In Alberta, Saskatchewan and Manitoba, opinion is divided between those who think they are decreasing and those who say these activities are staying the same. The view that agricultural activities are staying the same is higher among those under the age of 45.

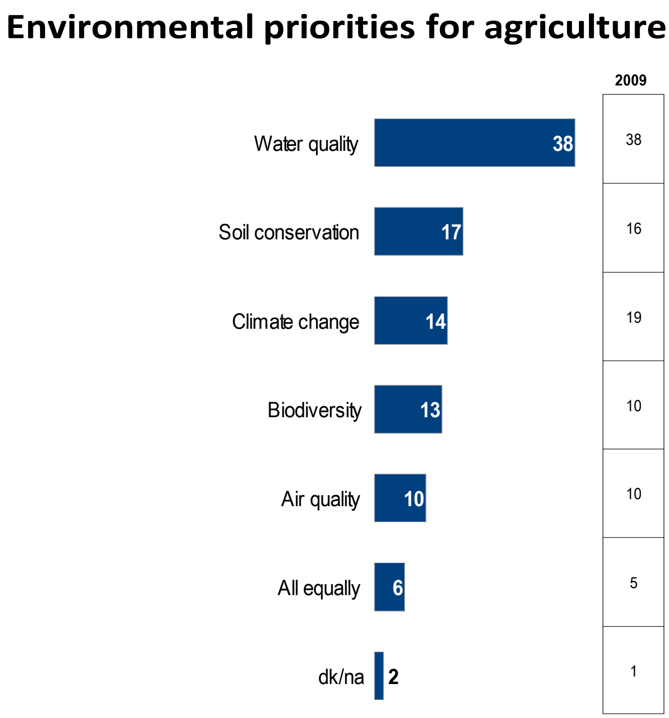
Agriculture and the environment

This section examines public views on agriculture and the environment, including environmental priorities as related to agriculture, the impact of agricultural activities on the environment and perceptions of actions taken by agricultural producers to minimize their impact.

Environmental priorities. Water quality continues to be seen as the most salient environmental priority as compared to soil conservation, climate change, biodiversity and air quality.

When asked which of five environmental priorities for agriculture they care about the most, Canadians continue to be most likely to choose water quality, mentioned by four in ten (38%). Between one and two in ten opt for soil conservation, climate change, biodiversity and air quality. Six percent say they care about all these issues equally.

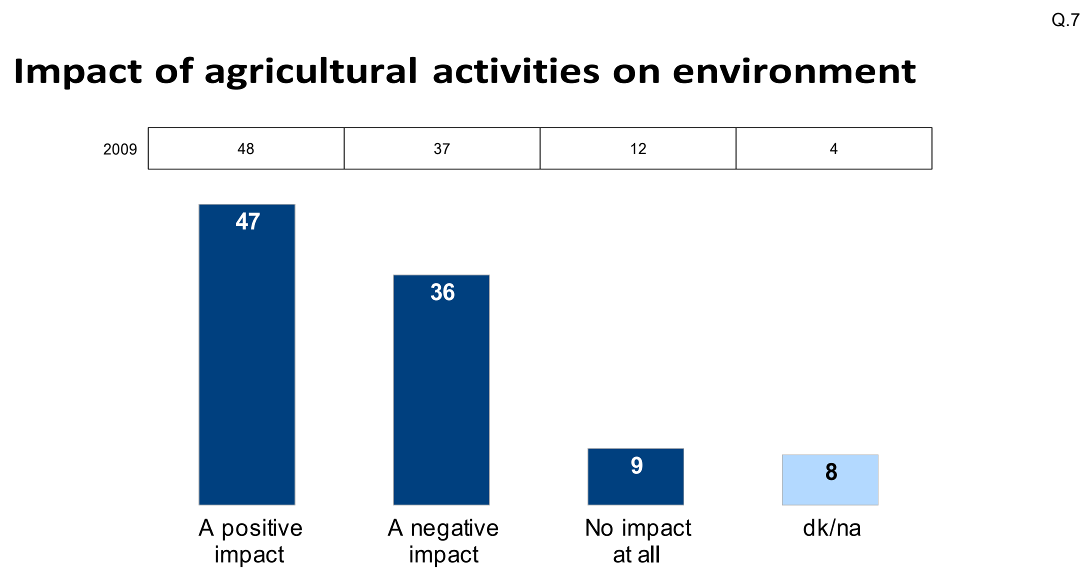
Q.6



There is little change since 2009 in these priorities.

Water quality is the highest priority across all regional and demographic subgroups. There is little significant difference across regional and demographic subgroups when it comes to environmental priorities, but biodiversity is a higher priority for university graduates.

Impact of agricultural activities on the environment. Most Canadians think agricultural activities have a positive impact, or no impact at all, on the environment. A total of 56 percent of Canadians believe agricultural activities have a positive impact (47%) or no impact at all (9%) on the environment. A smaller proportion (36%) think the impact is negative. Eight percent offer no opinion.



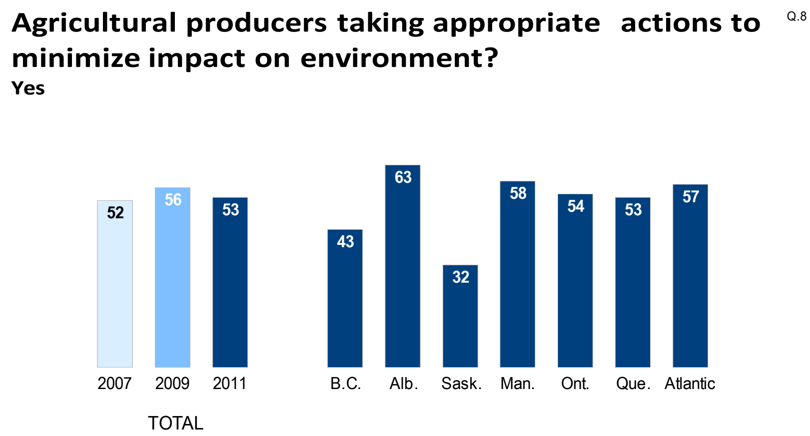
Since 2009, there has been a marginal decline in the proportion who say there is no impact at all, and a slight increase in the number who offer no opinion.

Ontarians are more likely than average to believe agricultural activities have a positive impact on the environment (59%), while Quebecers are less likely to believe this (31%) – a bare majority of 51 percent think these activities have a negative impact.

Women are more inclined than men to believe agricultural activities have a positive impact on the environment (54% vs. 40%), but men are no more likely to think these activities have a negative impact, and are more inclined than women to believe they have no impact at all (13% vs. 4%).

Perceptions of actions of agricultural producers re the environment. Canadians continue to have a positive perception of the actions of agricultural producers on the environment.

When asked to assess the actions of agricultural producers, just over half (53%) think they are taking the appropriate actions to minimize the impact of their agricultural activities on the environment, while one-third say they are not and 13 percent offer no opinion. The proportion who offer no opinion has increased since 2009.



The belief that agricultural producers are taking the appropriate actions regarding the environment is higher than average in Alberta (63%), and lower in British Columbia (43%) and Saskatchewan (32%) – a bare majority of 51 percent in the latter area disagree with this view. There are no significant differences across demographic subgroups.

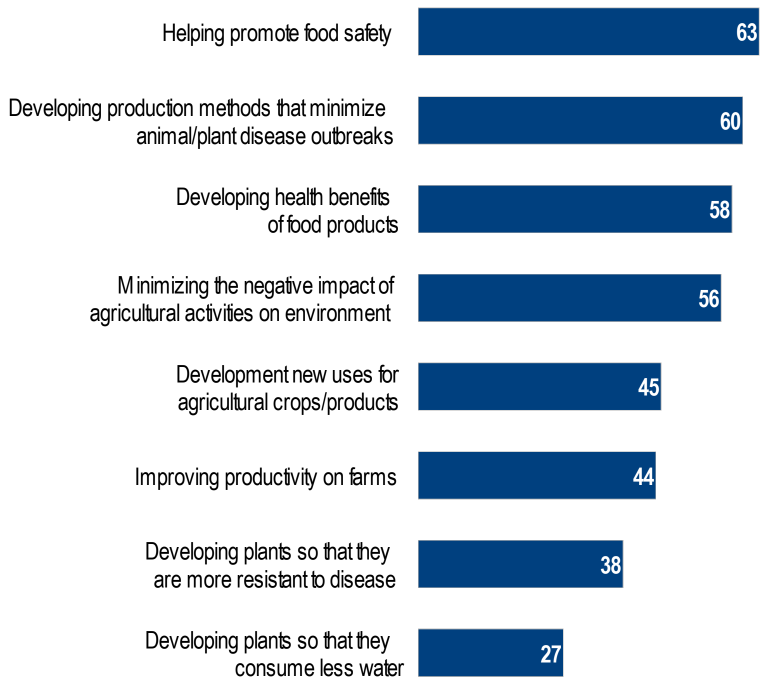
Scientific research in agriculture

Promoting food safety is seen as the most important objective for scientific research, while developing plants to make them consume less water is seen as the least important objectives***.***

Respondents were read a list of eight possible objectives for scientific research in agriculture. To gauge the relative importance of each item, the choices were presented in four randomized pairs of statements, and respondents were asked to choose which of the two statements was of higher priority.

Q.9

Scientific research in agriculture



The highest objectives for scientific research are helping to promote food safety (63%), and developing production methods that minimize animal and plant disease outbreaks (60%). Majorities also assign a high priority to developing health benefits of food products (58%), and to minimizing the impact of agricultural activities on the environment (56%).

Smaller proportions, more than four in ten, place a higher priority on developing new uses for agricultural crops or products, and improving productivity on farms.

Four in ten or fewer assign a high priority to developing plants so that they are more resistant to disease, and developing plants so that they consume less water.

It is interesting to note that developing methods to minimize plant and animal disease outbreaks ranks high on the list of scientific priorities, while developing plants so that they are resistant to disease ranks quite low. It would seem that the addition of “animal disease” in the former item accounts for its higher priority.

Canadians in Quebec are more likely than average to assign a higher priority to minimizing the impact of agricultural activities on the environment (Albertans are less likely to emphasize this priority) and developing health benefits of food products, but less likely than average to place a higher priority on helping to promote food safety, and developing production methods that minimize animal and plant disease outbreaks. Manitoba residents place a higher than average priority on developing plants so they are more resistant to disease and a lower than average emphasis on improving productivity on farms.

Women are more likely than men to assign a higher priority to promote food safety (69% vs. 56%). Those with higher education place a higher emphasis on minimizing the impact of agricultural activities on the environment.

Consumer preferences

This section examines consumer preferences when purchasing products, including how frequently the public checks food products for specific information, their definition of “locally grown” foods and the extent to which they purchase these products, and the importance of having access to a variety of food.

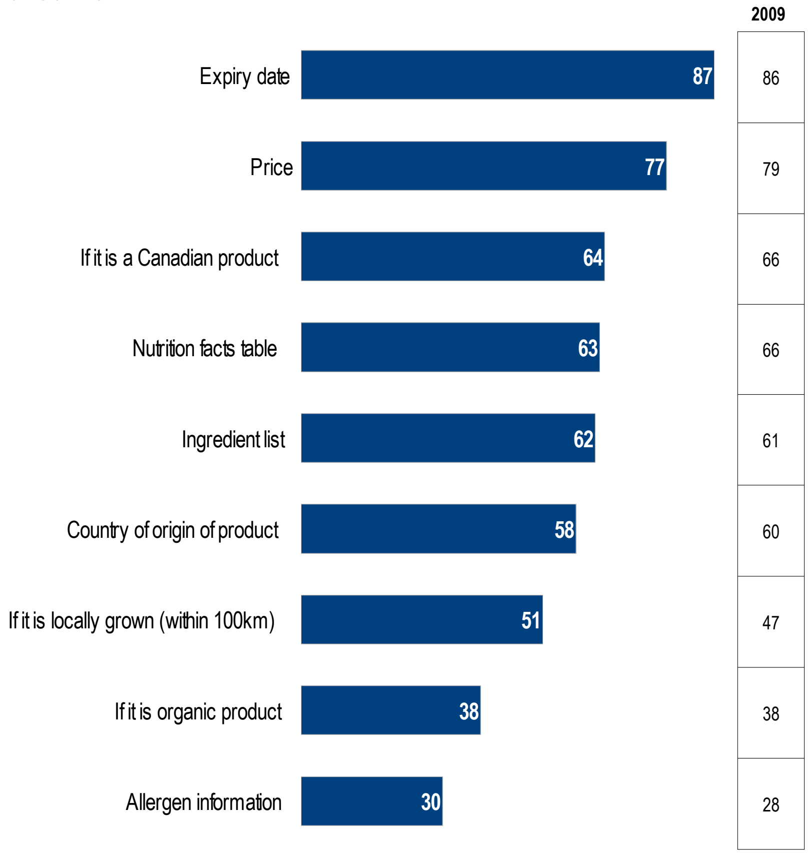
Checking for specific information re food products. Canadians continue to be most likely to check the expiry date and the price when buying food products, and least likely to look for allergen information.

Respondents were read a list of specific information which may be found on food products and asked how frequently they check for this information when buying food products for themselves or their family.

Canadians most commonly report checking the expiry date (87% always or often) and the price (77%). About six in ten each check the following attributes: whether it is a Canadian product (64%), nutrition facts table (63%), ingredient list (62%) and the country of origin of the product (58%). Half of Canadians (51%) check to see whether it is locally grown, meaning grown within 100 kilometres of where they live. Four in ten check to see if it is an organic product, and three in ten check for allergen information.

Food buying practices

Always/often check for



Since 2009, there has been a slight decline in the proportion who look for the nutrition facts table, and an increase in the number who check to see whether it is a locally grown product.

Residents of Saskatchewan are more likely than average to look at price and the nutrition facts table, but less likely to check for country of origin, whether it is a Canadian product and whether it is locally grown. Manitoba residents are less inclined than average to check for allergen information, country of origin, whether it is a Canadian product and whether it is locally grown. Albertans are more likely than average to look at the nutrition facts table, but less inclined to check whether it is locally grown. Quebecers are more likely than average to look at price. Atlantic Canadians are less likely to look at price and the nutrition facts table.

Women are more likely than men to look at a number of items: the expiry date (91% vs. 83%), price (81% vs. 73%), ingredient list (70% vs. 53%), nutrition facts table (70% vs. 55%) and whether it is a locally grown product (56% vs. 45%).

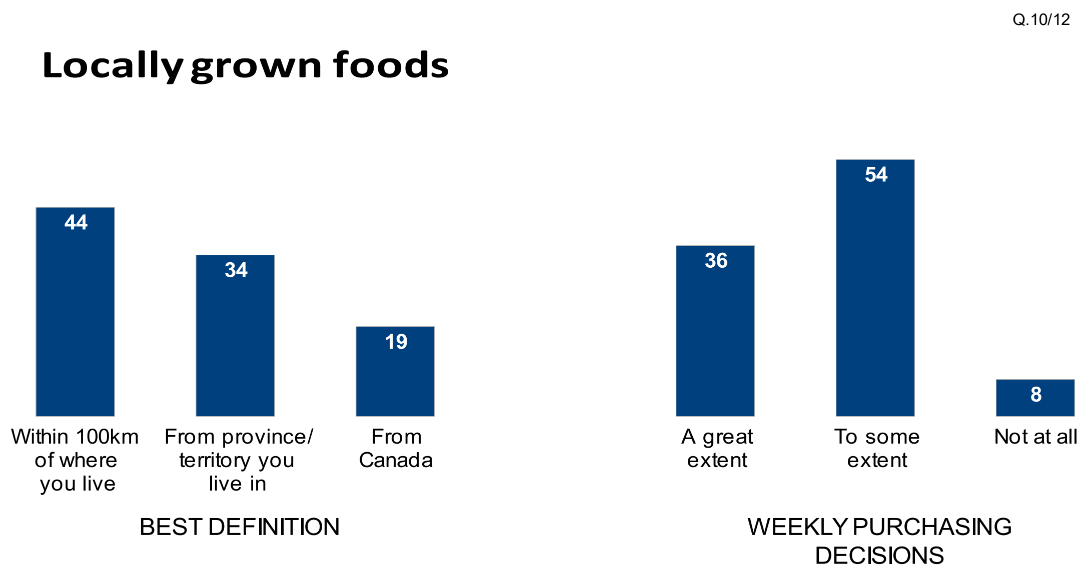
Canadians aged 45 and older are more inclined to check for country of origin and whether it is a Canadian product. The most affluent Canadians are less likely to look at price.

Definition of locally grown food. Most Canadians are divided as to the definition of what is "locally grown" food.

When asked what is the best definition of "locally grown" foods and offered three options, more than four in ten Canadians (44%) choose the definition that it is within 100 kilometres of where they live. However, 56 percent give another definition, including that it is from the province or territory they live in (34%), from Canada (19%), some other definition (1%) or offer no opinion (2%).

Albertans are less likely to choose the "within 100 km" definition of "locally grown" foods (34%). Canadians aged 45 to 54 are more likely than others to choose this definition.

Extent of including locally grown products in purchasing decisions. An overwhelming majority of Canadians make some effort to include locally grown products in their weekly purchases. Nine in ten (90%) report doing this, including just under four in ten (36%) who say they do this to a great extent and over half (54%) to some extent. Only eight percent say they do not do this at all.

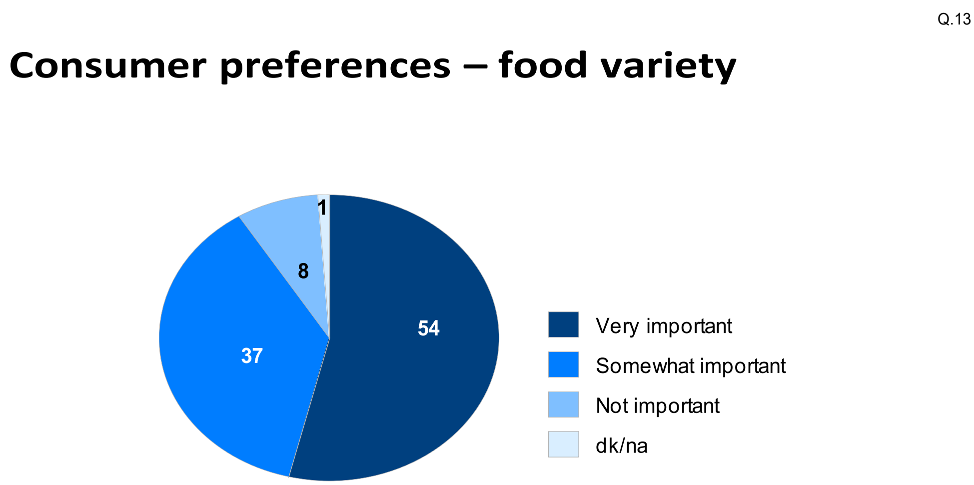


Frequent inclusion of locally-grown products in their weekly purchases is higher than average in Quebec (47% great extent), and lower in Alberta (24%) and Manitoba (15%).

Women are more likely than men to include locally-grown products to a great extent in their weekly purchases (40% vs. 32%).

Importance of a variety of food. An overwhelming majority of Canadians place some importance on having access to a wide variety of food such as coffee, bananas or nuts. Nine in ten (91%) say this is important, including over half (54%) who think this is very important. Only eight percent think this is not important.

The strength of importance of having access to a wide variety of food is higher than average in Manitoba (68%) and lower in Quebec (43%).



Interprovincial issues

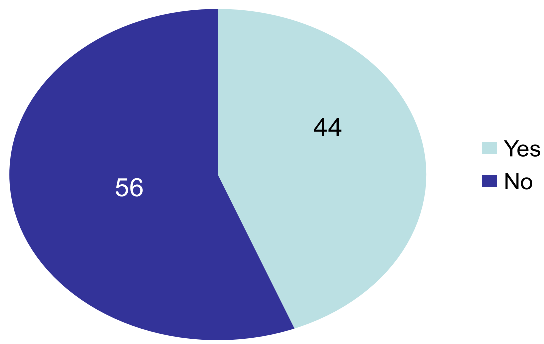
This section examines interprovincial issues, including awareness of laws that govern trading certain types of agriculture and food goods between Canada's provinces and territories, the importance of being able to buy wines directly from an out-of-province producer, and the importance of local businesses to be able to ship goods anywhere in Canada.

Awareness of interprovincial trade laws re agriculture and food goods. Many Canadians are not aware of interprovincial trade laws governing agriculture and food goods.

Respondents were informed that trading certain types of agriculture and food goods between Canada's provinces and territories is governed by a series of regulations and laws. For example, federal law prohibits individuals from taking a bottle of alcohol across a provincial border and prohibits vineyards from shipping their wine to a destination that isn't controlled by a provincial liquor board (where applicable). When asked if they were aware of these types of laws, more than four in ten (44%) say they are while over half (56%) say they are not.

Q.14

Interprovincial trade barriers – awareness



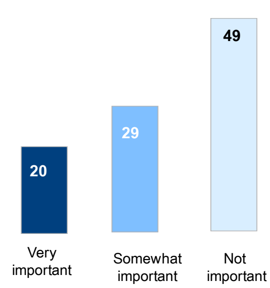
Awareness of these interprovincial trade laws is higher than average in British Columbia (56%) and lower in Saskatchewan (29%).

Awareness does not vary significantly across demographic subgroups.

Importance of buying wine directly from out-of-province producer. Canadians are divided as to the importance of being able to buy wines directly from a producer in a province other than their own. A total of half (49%) say it is important, including 20 percent who think this is very important. Half (49%) think this is not important.

Interprovincial trade: importance of buying wines directly from producer in another province

Q.15



British Columbians (30%) and Albertans (25%) are more likely than average to think it is very important to be able to buy wines directly from a producer in a province other than their own, while Saskatchewan residents (7%) are less likely to express this degree of importance. Both Saskatchewan residents (61%) and Quebecers (53%) are more likely to say this is not important.

The least affluent Canadians are also less likely to consider this very important.

Importance of local businesses being able to ship goods anywhere in Canada. An overwhelming majority of Canadians see some importance in local businesses, such as a vineyard, to be able to ship goods such as wine anywhere in Canada. A total of just under nine in ten (87%) say it is important, including two-thirds (66%) who think it is very important. Only 10 percent think this is not important.

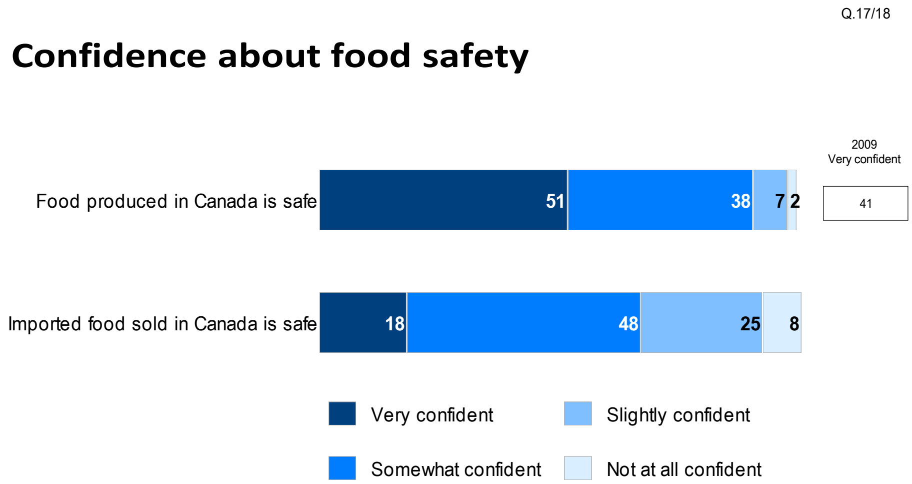
Saskatchewan residents are less likely than average to think it is very important for local businesses to be able to ship wine anywhere in Canada.

Food safety

This section examines Canadians' perceptions of food safety, including confidence in food produced in Canada and imported food sold in Canada, and the likelihood of food contamination at a list of places.

Confidence in food produced and imported food sold in Canada. Canadians express more confidence in the safety of food produced in Canada than they do in the safety of imported food sold in Canada. Moreover, strongly expressed confidence in food produced in Canada has increased since 2009.

An overwhelming majority of Canadians continue to express some confidence in the safety of food produced in the country. Nine in ten Canadians (89%) are confident that food produced in Canada is safe, including one-half (51%) who are very confident. Only nine percent are not confident.



Since 2009, strongly expressed confidence is up 10 points.

A large majority express some confidence in the safety of imported food sold in Canada. Two-thirds (66%) are confident that imported food sold in Canada is safe, but this includes only two in ten (18%) who are very confident and half who are only somewhat confident (48%). One-third are not confident.

Strongly expressed confidence in the safety of food produced in Canada is higher than average in Manitoba (63%) and Ontario (61%), and lower in Quebec (43%) and British Columbia (39%).

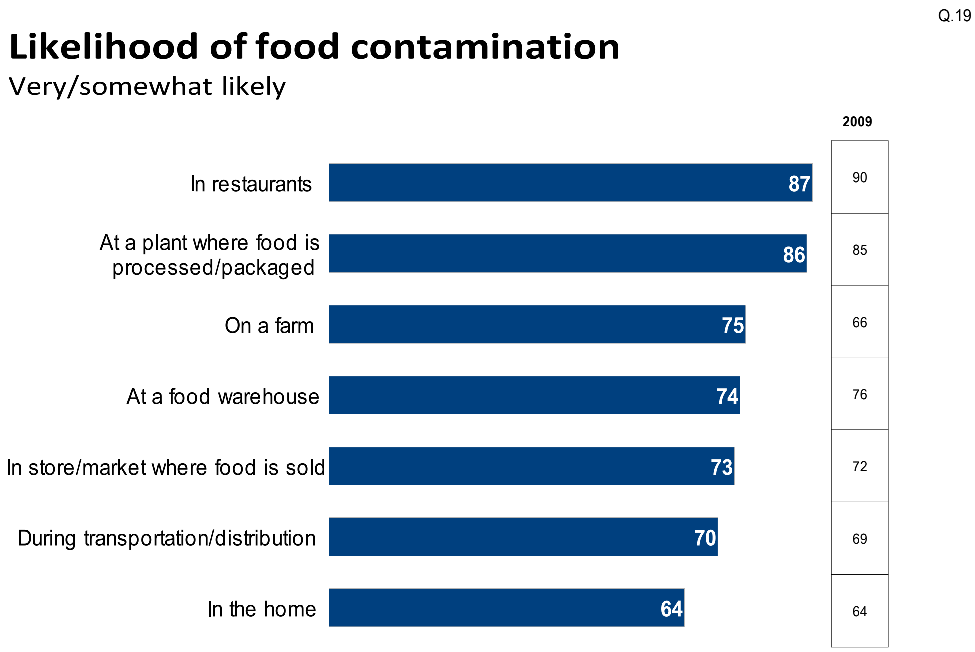
Strongly expressed confidence in the safety of imported food sold in Canada is higher than average in Manitoba (37%). It is also higher among women than among men (21% vs. 14%).

Likelihood of food contamination at a list of places. Canadians are most likely to perceive restaurants and food processing and packaging plants as places of possible food contamination, and least inclined to say that home is a source of contamination.

Respondents were asked to consider the likelihood that food contamination might happen in a number of places. Restaurants (87%), and food processing and packaging plants (86%) are most often seen as the places where food contamination is very or somewhat likely to occur.

Large majorities of at least seven in ten think it is likely that food contamination can happen on a farm, at a food warehouse, the store or market where food is sold, and during transportation or distribution.

Canadians are least likely to think that food contamination can happen in the home, but a majority of 64 percent think this is at least somewhat likely.



Since 2009, there has been little change in Canadians' perceptions of the likelihood of food contamination at various places; however, there has been a nine-point increase in the proportion who think it is likely that food contamination can occur on a farm.

Manitobans are more likely than average to think it is very likely that food contamination can happen at restaurants and in the home. Residents of Saskatchewan are more likely than average to think it is very likely to occur in the home, but less likely to think it can happen during transportation or distribution. British Columbians are more likely than average to think food processing and packaging plants are very likely sources of food contamination. Quebec residents are less likely than average to think it is very likely that food contamination can happen on a farm, a food processing and packaging plant, a restaurant and in the home.

Women are more likely than men to say it is very likely that food contamination can happen in restaurants (49% vs. 39%), at a food warehouse (31% vs. 24%), and during transportation or distribution (25% vs. 19%).

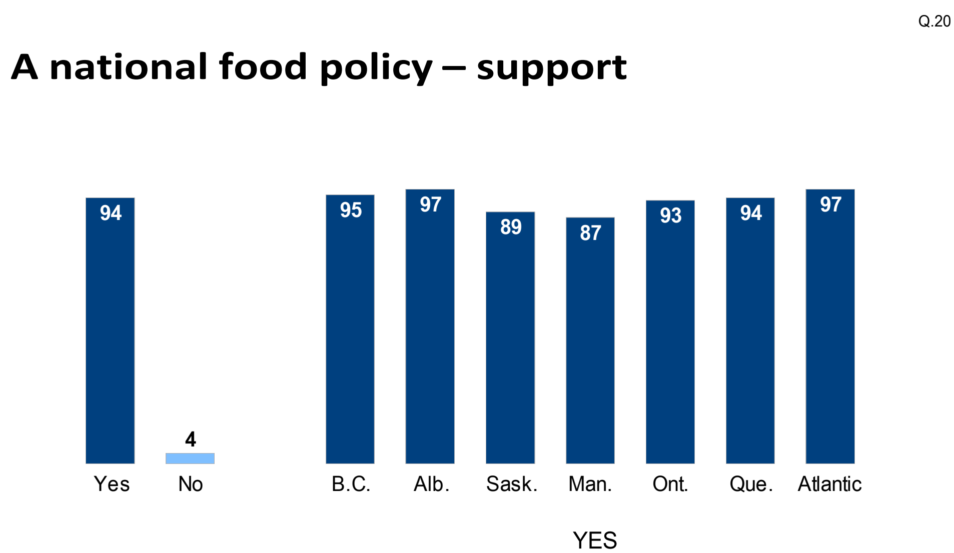
National food policy

This section examines Canadians' attitudes toward Canada adopting a food policy and the preferred priorities for this policy.

Canadians express almost unanimous support for a national food policy, and think that promoting conservation and protection of resources, and increasing access to affordable and nutritious food in Canada should be top priorities.

When Canadians are asked if Canada should have a food policy that sets out a vision for agricultural policy and includes support for agriculture, more than nine in ten (94%) express support.

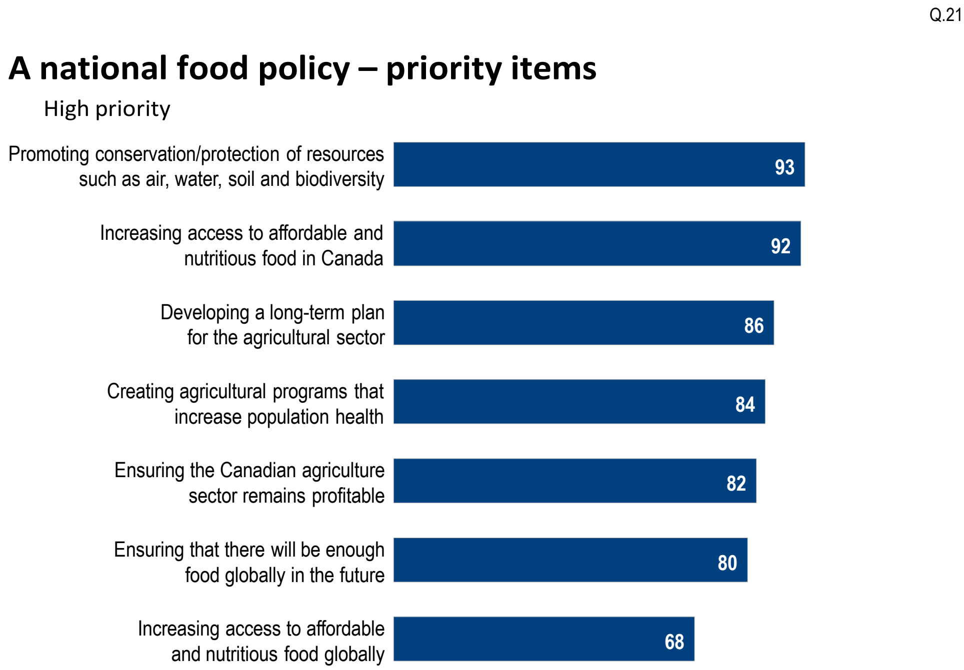
Support for a national food policy is consistent across all regional and demographic subgroups.



In a follow-up question, respondents were read a list of possible objectives for a national food policy and asked what level of priority they felt Canada should place on specific objectives: a high priority, low priority or no priority at all.

Majorities of Canadians place a high priority on all of the listed objectives, but the highest priorities are promoting conservation and protection of resources, followed by increasing access to affordable and nutritious food in Canada. The lowest priority is increasing access to affordable and nutritious food globally.

Nine in ten or more place a high priority on promoting conservation and protection of resources (93%), and increasing access to affordable and nutritious food in Canada (92%).



Large majorities of eight in ten or more also place a high priority on developing a long-term plan for the agricultural sector, creating agricultural programs that increase population health, ensuring the Canadian agriculture sector remains profitable and ensuring that there will be enough food globally in the future.

The lowest priority for a national food policy is increasing access to affordable and nutritious food globally (68%).

Atlantic Canadians are more likely than average to place a high priority on creating agricultural programs that increase population health and ensuring the Canadian agriculture sector remains profitable. Quebecers are more likely than average to put a high priority on increasing access to affordable and nutritious food globally, and are less likely to say the same of increasing access to affordable and nutritious food in Canada. Residents of Saskatchewan are more likely than average to place a high priority on ensuring the Canadian agriculture sector remains profitable, and less likely than average to say the same about increasing access to affordable and nutritious food globally.

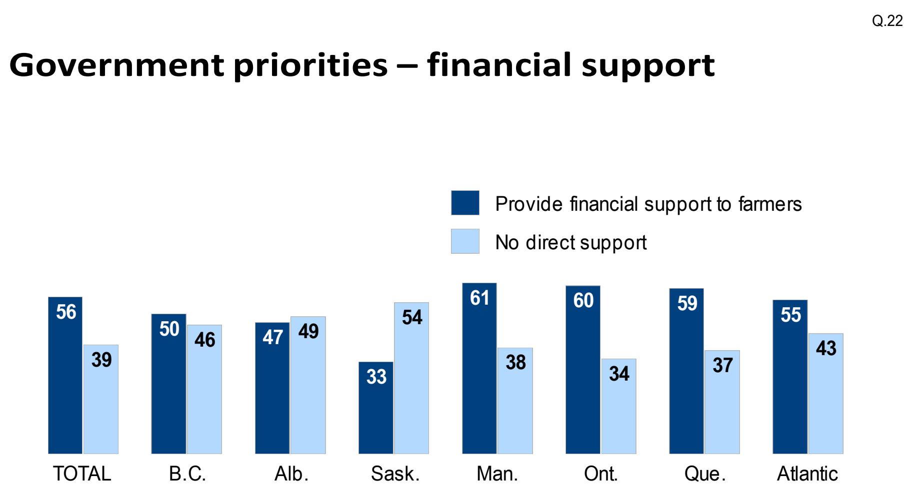
Women are more likely than men to place a high priority on increasing access to affordable and nutritious food in Canada, ensuring that there will be enough food globally in the future, and increasing access to affordable and nutritious food globally. University graduates are less inclined to place a high priority on ensuring that there will be enough food globally in the future.

Public priorities for agriculture

This section examines Canadians' attitudes on government financial support for farmers and agricultural priorities.

Government financial support for farmers. Most Canadians favour providing direct government financial support to farmers who are unable to make a sustainable living through farming.

Respondents were presented with two statements regarding government financial support for farmers and asked which one is closest to their view. A majority of 56 percent think governments should provide direct financial support to farmers who are unable to make a sustainable living from farming alone, while 39 percent think farmers should plan their business and use all tools available so their operations achieve a sustainable profit without direct financial support from government.

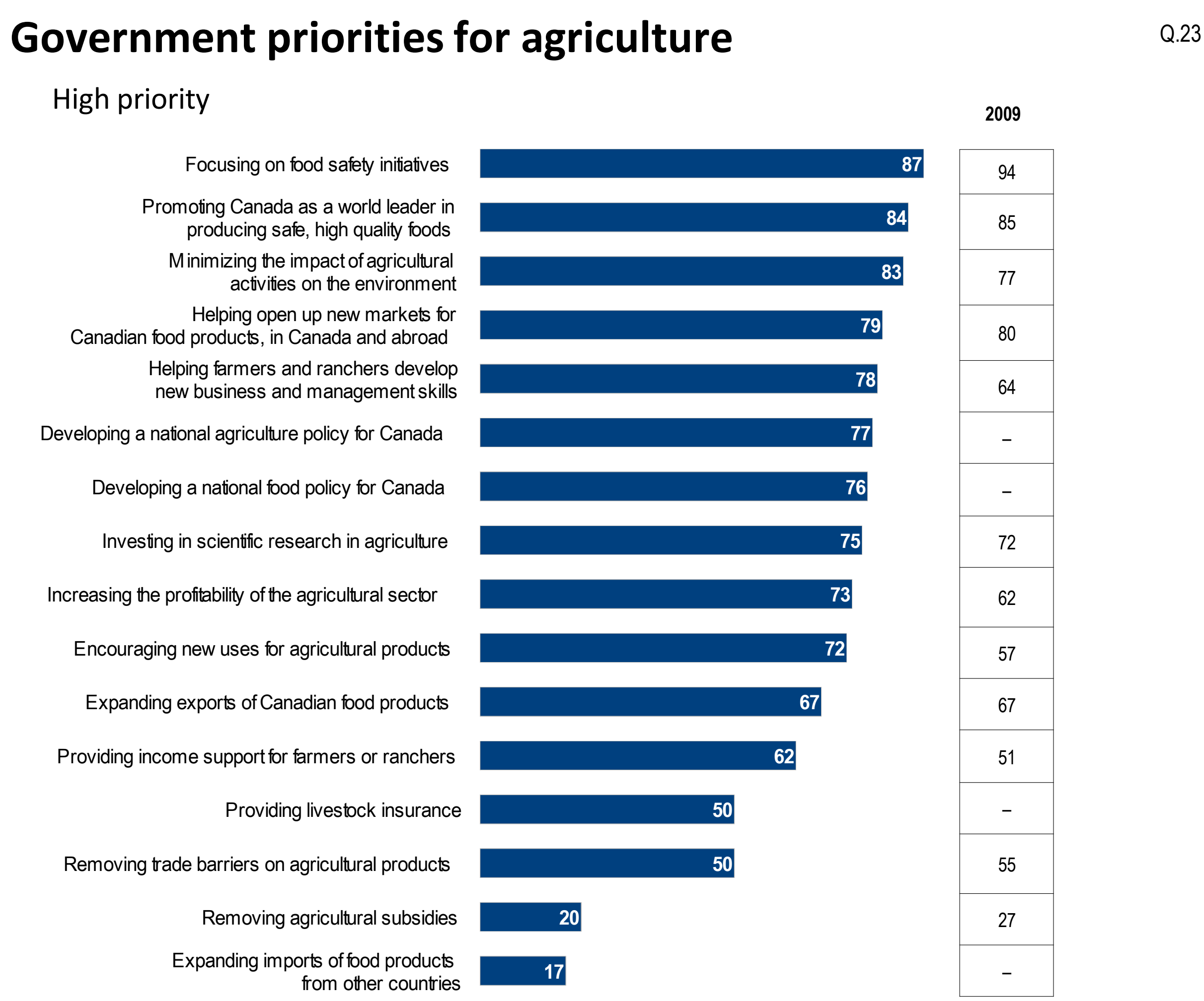


Attitudes toward governments providing direct financial support to farmers vary across the country. Majorities of residents in Manitoba, Ontario, Quebec and Atlantic Canada think government should provide direct financial support to farmers who are unable to make a sustainable living from farming alone. A majority of Saskatchewan residents think farmers should plan their business so their operations achieve a sustainable profit without financial support from the government. Residents of British Columbia and Alberta are divided between these two views.

Views differ significantly between men and women. Women are more likely than men to think government should provide financial support (66% vs. 45%), while men are more inclined than women to achieve a sustainable profit without financial support from the government (50% vs. 29%).

Agriculture priorities. Respondents were read a list of agricultural priorities and asked what level of priority they felt governments should place on them: a high priority, low priority or no priority at all.

Food safety; promoting Canada as a producer of safe, high quality foods; and minimizing the environmental impact of agricultural activities are seen as the highest priorities for governments. Very low priorities are placed on removing agricultural subsidies and expanding imports of food products from other countries.



More than eight in ten place a high priority on focusing on food safety initiatives (87%), promoting Canada as a world leader in producing safe, high quality foods (84%) and minimizing the impact of agricultural activities on the environment (83%).

Between seven and eight in ten assign a high priority to helping open up new markets for Canadian food products, in Canada and abroad, helping farmers and ranchers develop new business and management skills, developing a national agriculture policy for Canada, developing a national food policy for Canada, investing in scientific research in agriculture, increasing the profitably of the agricultural sector and encouraging new uses for agricultural products.

Smaller majorities also place a high priority on expanding exports of Canadian food products, and providing income support for farmers or ranchers.

Half assign a high priority to removing trade barriers on agricultural products and providing livestock insurance.

At the bottom of the list of priorities are removing agricultural subsidies (20%) and expanding imports of food products from other countries (17%).

Atlantic Canadians are more likely than average to think governments should place a high priority on most of these issues. Albertans are more likely to assign a high priority to promoting Canada as a world leader in producing safe, high quality foods and removing trade barriers on agricultural products, but less inclined to place the same emphasis on providing income support for farmers or ranchers. Residents of Manitoba and Saskatchewan are also less inclined to place a high priority on providing income support for farmers or ranchers, as well as on expanding imports of food products from other countries. Manitobans also put less emphasis on minimizing the impact of agricultural activities on the environment and on helping open up new markets for Canadian food products, in Canada and abroad, while Saskatchewan residents are also less likely to put a high priority on developing a national agricultural policy for Canada, providing livestock insurance and investing in scientific research in agriculture. Quebecers are less likely to place a high priority on developing a national food policy for Canada, promoting Canada as a world leader in producing safe, high quality foods and removing trade barriers on agricultural products.

Women are more likely than men to place a high priority on helping farmers and ranchers develop new business and management skills, and providing income support to them and providing livestock insurance.

University graduates are more likely to place a high priority on investing in scientific research in agriculture. Those aged 18 to 34 place less emphasis on removing trade barriers on agricultural products.

3.0 Survey of Producers

This section of the report presents the key findings of the survey of producers, based on a telephone survey of 2,000 producers, who hold or share primary responsibility for making decisions regarding their farm operations. A random survey with this sample size has a margin of error of +/- 2.2 percentage points, 19 times in 20.

The survey probed opinion about developments affecting producers, the most important issues facing agriculture in Canada today, views about agriculture as an industry, attitudes toward environmental, scientific, and food safety issues facing agriculture, support for a national food policy, views about government priorities for agriculture, access to agricultural products, situations faced by the agricultural sector, and international marketing of Canadian products.

Profile of producers

This section provides a profile of producers participating in this survey, including the years they have been managing a farm business, classification of their farm operation/business, type of production contributing most to their gross farm revenue, annual farm sales in 2010, whether their net farm income has increased, stayed the same or decreased, and whether their household receives off-farm income.

A majority of producers have been managing a farm business for 25 years or more (69%), including one-quarter (26%) who have been doing this for 40 years or more. Three in ten (32%) have been managing a farm business for fewer than 25 years, including nine percent who have only been doing this for fewer than 10 years.

Producers in Quebec are more likely than average to have been managing a farm business for fewer than 10 years (26%). Saskatchewan producers are more likely than average to have been managing a farm for 40 years or more (35%).

Most producers are sole proprietors of their farm operation/business (50%). Another 26 percent classify their operation as a corporation. Smaller numbers describe it as a partnership without a written agreement (14%) or partnership with a written agreement (7%).

Producers in Saskatchewan are more likely than average to be sole proprietors (67%). Those who reside in Quebec are more likely than average to be a corporation (53%). Ontario producers are more inclined than average to classify themselves as a partnership without a written agreement (21%).

Field crops (41%), followed by cattle (25%), were the types of production that most contributed to producers' gross farm revenue. Smaller numbers cite dairy (7%), vegetable crops (5%), bedding house/greenhouse landscaping (4%), fruit crops (4%) and other livestock (4%). Fewer than three percent each cite other types of production.

Producers in Saskatchewan are more likely than average to say field crops are the type of production that most contribute to their gross farm revenue (68%). Alberta producers are more likely than average to mention cattle (42%), while those in Quebec (19%) and Atlantic Canada (16%) are more inclined than average to cite dairy. Quebec producers are also more likely than average to mention vegetable crops (17%), while those residing in Atlantic Canada are also more inclined than average to cite fruit crops (15%).

Most producers (56%) report annual farm sales in 2010 of less than $100,000. Another 22 percent report annual farm sales of between $100,000 and under $250.000, while another 22 percent report $250,000 or more in farm sales.

Producers in British Columbia are more likely than average to report farm sales of less than $100,000 (65%), while those who reside in Quebec are more likely than average to report $250,000 or more in annual farm sales (31%).

Most producers report that the net farm income of their operation has decreased during the last five years (45%). Another 27 percent say it has increased, and 26 percent say it has stayed the same.

Producers in Saskatchewan are more likely than average to report an increase in net farm income during the last five years (36%), while those in Atlantic Canada are more likely than average to report a decrease in net farm income (56%). Producers with annual farm sales of $250,000 or more are more likely than others to report an increase in net farm income during the last five years (40%), especially compared to those with annual farm sales of less than $100,000 (20%). In contrast, those with annual farm sales of less than $100,000 are more likely than others to report a decline in net farm income (51%), particularly compared to those with annual farm sales of $250,000 or more (34%).

Half of producers (49%) report receiving off-farm income. Producers with annual farm sales of less than $100,000 are more likely than others to report receiving off-farm income (56%), particularly in comparison to those with annual farm sales of $250,000 or more (34%).

The following table presents a profile of producers.

Producers profile

Number of years	%
<25	32
25 - 39	43
40 and over	26

Type of operation	
Sole proprietor	50
Corporation	26
Partnership without a written agreement	14
Partnership with a written agreement	7
All others	2

Sector/type of production	
Field crops (e.g., cereals, oil seeds, pulse crops, tame hay, row crops potatoes, sugar beets, other field crops)	41
Cattle	25
Dairy	7
Vegetable crops	5
Bedding/greenhouse landscaping	4
Fruit crops	4
Other livestock (e.g., sheep, bison, horses llamas, ostrich, etc.)	4
Poultry (e.g., eggs, chickens, turkeys, hens, chicks, game birds)	2
Pigs	2
All other	5

Farm sales (annual)	%
$10,000 to just under $100,000	56
$100,000 to just under $250,000	22
$250,000 or more	22

Changes in income over the last five years	
Increased	27
Stayed the same	26
Decreased	45

Household receive off-farm income?	
Yes	49
No	50

Gender	
Male	74
Female	26

Developments affecting producers

This section examines developments affecting producer practices, including factors affecting their production plans, the impact of specific developments on their production practices, and whether they are doing anything differently as a producer compared to five years ago.

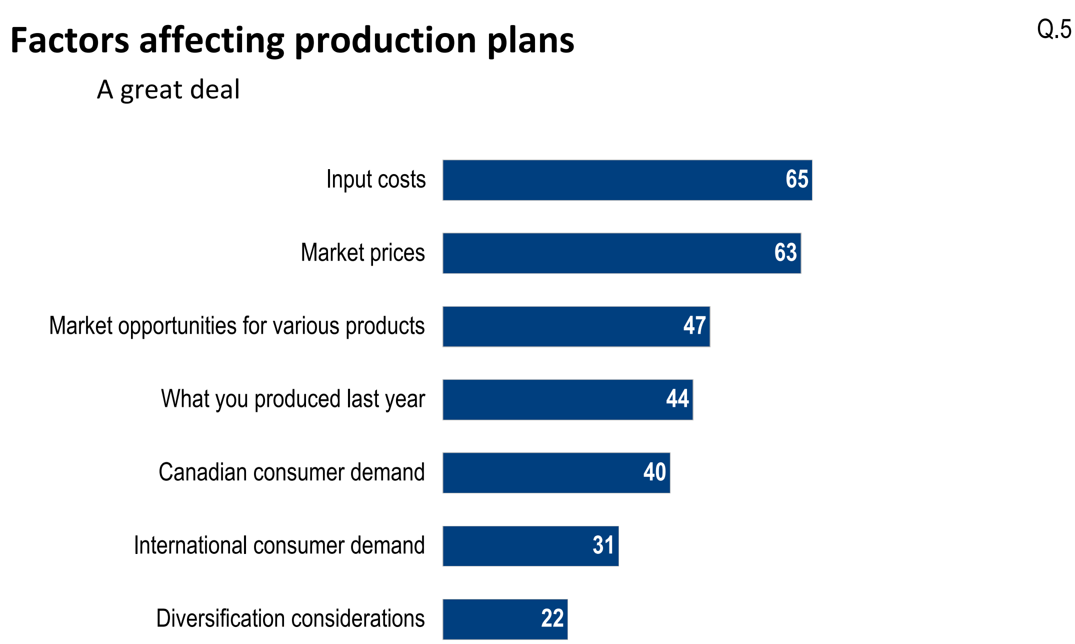
Factors affecting production plans. Producers say that input costs and market prices have the greatest effect on their production plans, while diversification considerations have the least effect.

Producers were asked to consider the effect of specific factors in planning their yearly production in terms of what to produce, how much, and their production practices. Large majorities of between three-quarters and nine in ten producers say all the factors tested in the survey have at least some effect on their production plans.

Looking at the proportions who say they have a great deal of effect, producers are most likely to say input costs such as fuel, fertilizer, vaccines, etc. (65%) and market prices (63%) have a great deal of effect on their production plans.

More than four in ten say the same about factors such as what market opportunities there are for various products (47%), what they produced last year (44%) and what the Canadian consumer wants on their plate (40%).

Three in ten (31%) say what the international consumer wants on their plate affects their production plans a great deal.



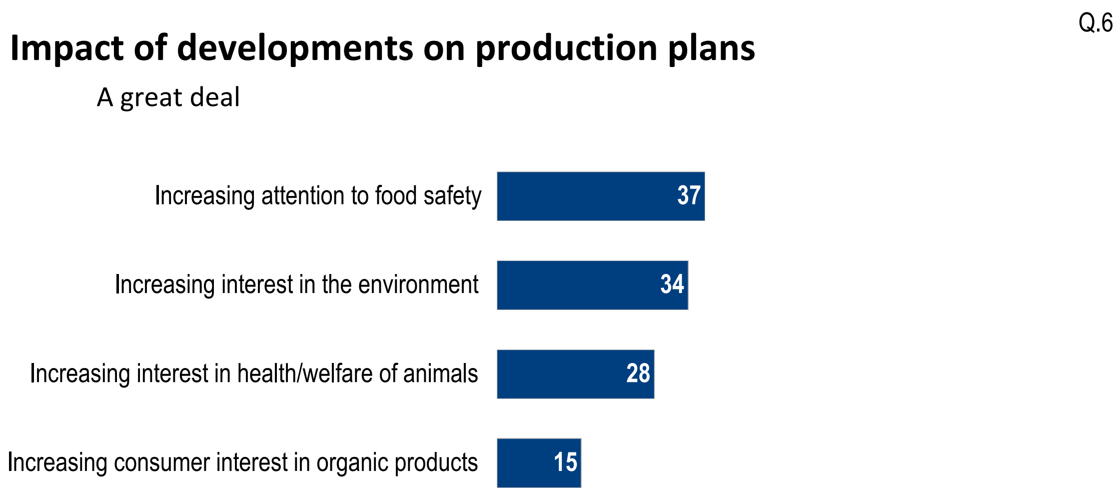
Producers are least likely to say diversification considerations have affected their production plans, with just two in ten (22%) saying this factor has had a great deal of effect on these plans.

Producers in Quebec are more likely than average to say the following factors have a great deal of effect on their production plans: what they produced last year, what the Canadian consumer wants on their plate, diversification considerations and what the international consumer wants on their plate. Those residing in British Columbia are also more likely than average to say that what the Canadian consumer wants on their plate and what they produced last year have a great deal of effect on these plans. Ontario producers are also more inclined than average to say that what the Canadian consumer wants on their plate is a factor that has a great deal of effect on their production plans.

Producers with annual farm sales below $250,000 are more inclined to say input costs have a great deal of effect on their production plans.

Impact of developments on their production practices. Producers are the most likely to say that the increasing attention to food safety and the increasing interest in the environment have changed their production practices in the past three to five years a great deal, and least likely to say the same about increasing consumer interest in organic products.

When asked to consider how much specific developments have changed their production practices in the past three to five years, majorities of between five and eight in ten producers say all the developments the survey asked them about have changed their production practices at least somewhat.



Looking only at the proportions who say each development has had a great deal of effect, producers are most likely to say the increasing attention to food safety (37%) and the increasing interest in the environment (34%) have changed their production practices in the past three to five years a great deal.

Three in ten (28%) say the increasing interest in the health and welfare of animals has had the same impact on their production practices.

Producers are least likely to say that increasing consumer interest in organic products has changed their production practices a great deal (15%).

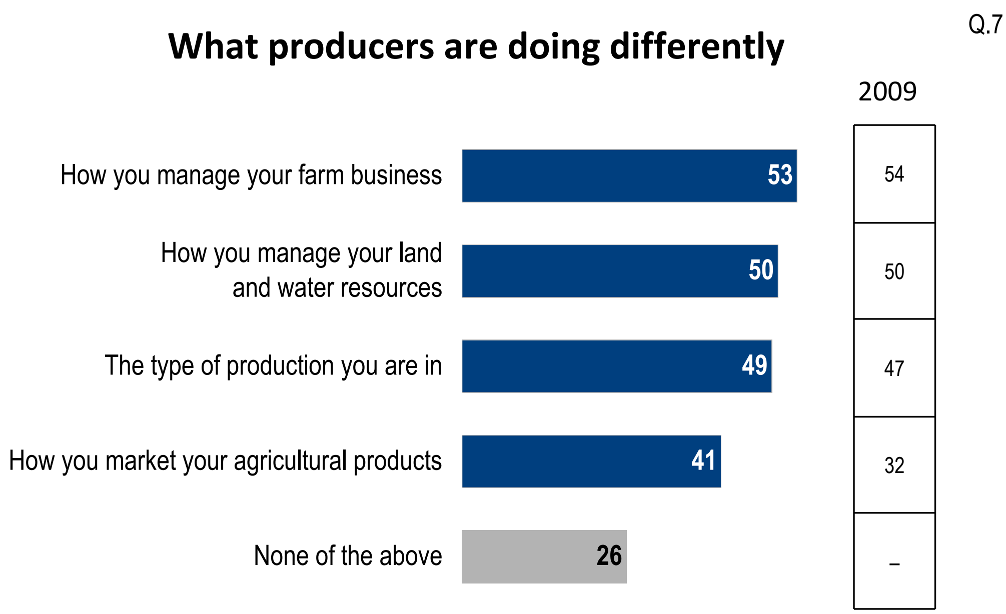
Producers in Quebec are more likely than average to say all these developments have changed their production practices in the past three to five years a great deal.

Producers with annual farm sales below $100,000 are more inclined than others to say increasing consumer interest in organic products has changed their production practices a great deal.

What producers are doing differently? Producers are most likely to have changed how they manage their farm business, their land and water resources, and the type of production they are in, and are less inclined to say they have changed the way in which they market their agricultural products.

Producers were asked if they are doing anything different than two years ago, when it came to four specific activities. About half say they have changed how they manage their farm business (53%), the way in which they manage their land and water resources (50%), and the type of production they are in, whether it is what they produce or how they produce it (49%).

Fewer, four in ten (41%), say they have changed the way in which they market their agricultural products.



Since 2009, there has been an increase in the proportion of producers who say they have changed the way in which they market their agricultural products.

One-quarter (26%) say they are not doing anything differently in any of these areas.

Quebec producers are more likely than average to say they have changed how they manage their farm business (60%) and the type of production they are in (57%).

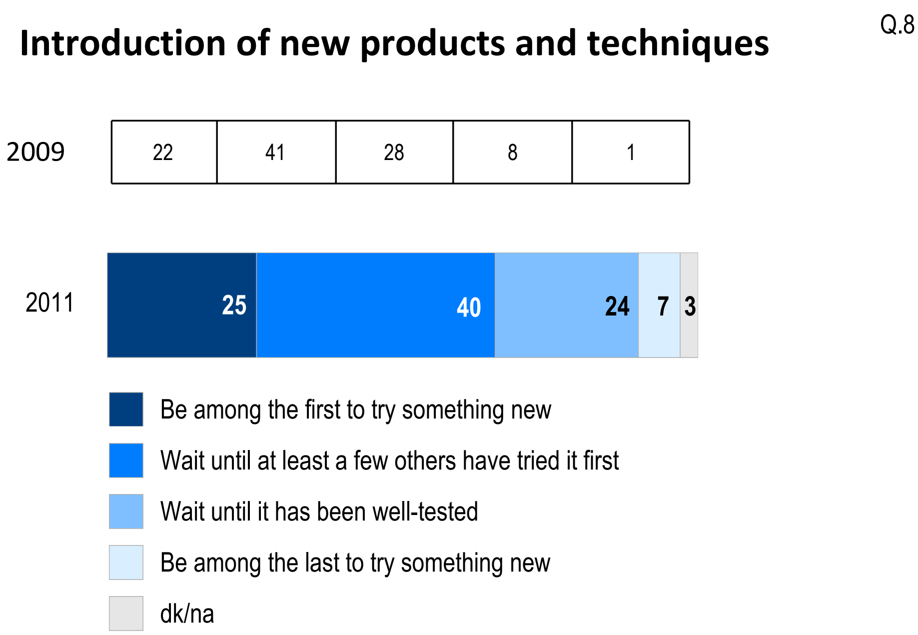
Producers with annual farm sales of $250,000 or more are more inclined than others to say they have changed how they manage their farm business.

Producers who receive off-farm income are more likely than those who do not to report changing how they manage their farm business and the way in which they market their agricultural products.

Introduction of new products and techniques. Most producers say that when it comes to the introduction of new products and techniques, they wait until at least a few others have tried it first.

When asked about the introduction of new products and techniques, one-quarter (25%) say their farm operation tends to be among the first to try something new. Four in ten (40%) say they wait until at least a few others have tried it first and another quarter (24%) say they wait until it has been well-tested. Fewer than one in ten (7%) say they are among the last to try something new.

Since 2009, there has been a slight increase in the number of producers who claim to be the first to try something new, and a slight decline in the proportion who say they like to wait until it has been well-tested.



Producers in Quebec (49%), British Columbia (35%) and Atlantic Canada (35%) say they are among the first to try something new. Those who reside in Saskatchewan are more inclined to say they wait until at least a few others have tried it first. Ontario producers are more likely to say they wait until it has been well-tested.

Producers with annual farm sales of $250,000 or more are more inclined than others to say they are among the first to try something new. Those with annual farm sales of below $100,000 are more likely than others to say they wait until it has been well-tested or are among the last to try something new.

Use of government programs

This section examines producers' use of government programs in their farm operation, including whether they currently use these programs, which programs they are using, and their likelihood to apply for government programs and services compared to two years ago.

Current use of government programs in farm operation. Half of producers are currently using government programs in their farm operation, and the most frequently used programs are AgriStability and AgriInvest.

Half of producers (48%) say they are currently using government programs in their farm operation.

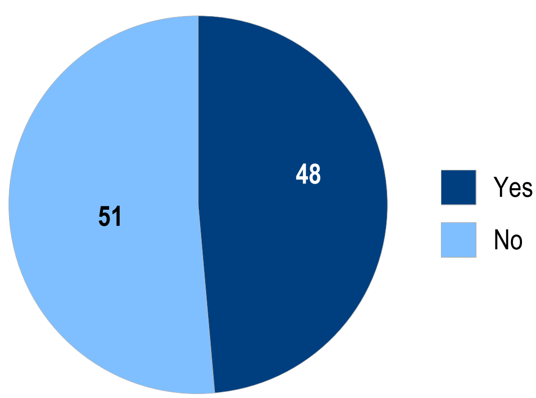
Producers in Manitoba (58%) and Saskatchewan (55%) are more likely than average to be using government programs in their farm operation, while those residing in British Columbia are less likely than average to be using these programs (37%).

Those with annual farm sales of below $100,000 are less likely than others to say they are currently using government programs in their farm operations.

Among those who are using government programs, the most frequently used programs are AgriStability (51%) and AgriInvest (40%). One-quarter are using crop or production insurance. Fewer than one in ten each are using any other programs.

Q.9

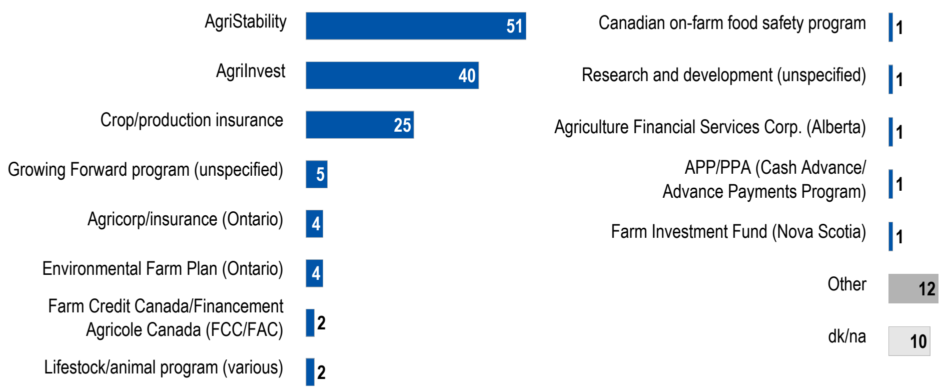
Current use of government programs in farm operations



Current use of government programs in farm operations

Q.10

Asked unprompted



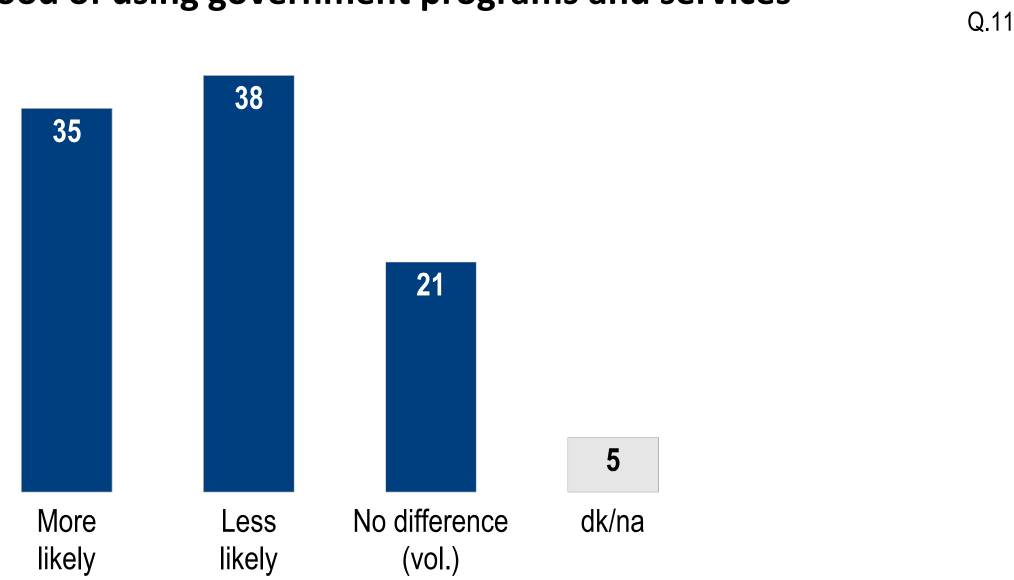
Producers in Manitoba are more likely than average to be using AgriStability and AgriInvest. Those in Saskatchewan are more inclined than average to be using AgriStability and crop/production insurance. Ontario producers are more likely than average to be using Agricorp/insurance and the Environmental Farm Plan.

Those with annual farm sales of $100,000 or more are more likely to be using AgriStability and AgriInvest.

Likelihood of using government programs and services. About equal numbers of producers say they are more likely and less likely to be applying for government programs and services than they were two years ago.

Producers were asked whether they are more or less likely to apply for government programs and services compared to two years ago. Similar numbers say more (35%) or less (38%). Two in ten say that their likelihood to apply for these programs and services is no different than it was two years ago.

Likelihood of using government programs and services



Quebec producers are more likely than average to apply for government programs and services today compared to two years ago.

Producers with annual farm sales of $250,000 or greater are more inclined than others to apply for government programs and services compared to two years ago. Those with annual farm sales of below $250,000 are less likely to be doing this.

Most important issue

This section examines producers' attitudes toward the most important issue facing Canadian agriculture at present and five years from now.

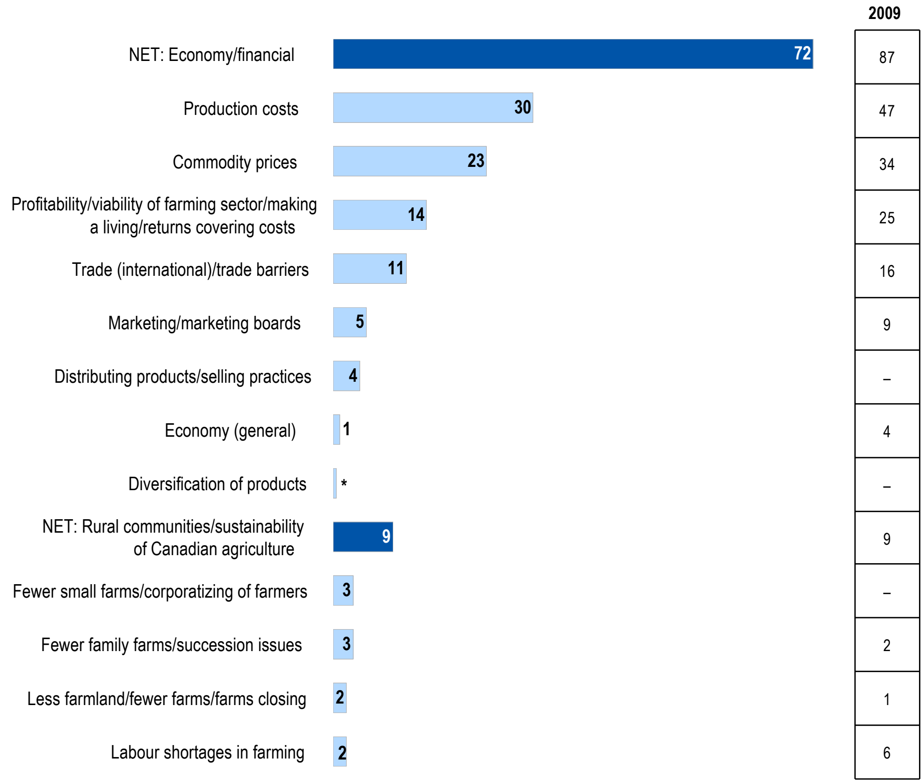
Most important agriculture issue today. Near the beginning of the survey, producers were asked their opinion as to what is the most important issue facing Canadian agriculture today (asked unprompted).

Top-of-mind, economic or financial issues are the most frequently mentioned issue of concern, cited by seven in ten producers (72%). These encompass issues including production costs (30%), commodity prices (23%), profitability or viability of farming sector (14%), trade barriers (11%), marketing or marketing boards (5%), distributing products or selling practices (4%), and others.

Q.3

Most important issue facing Canadian agriculture

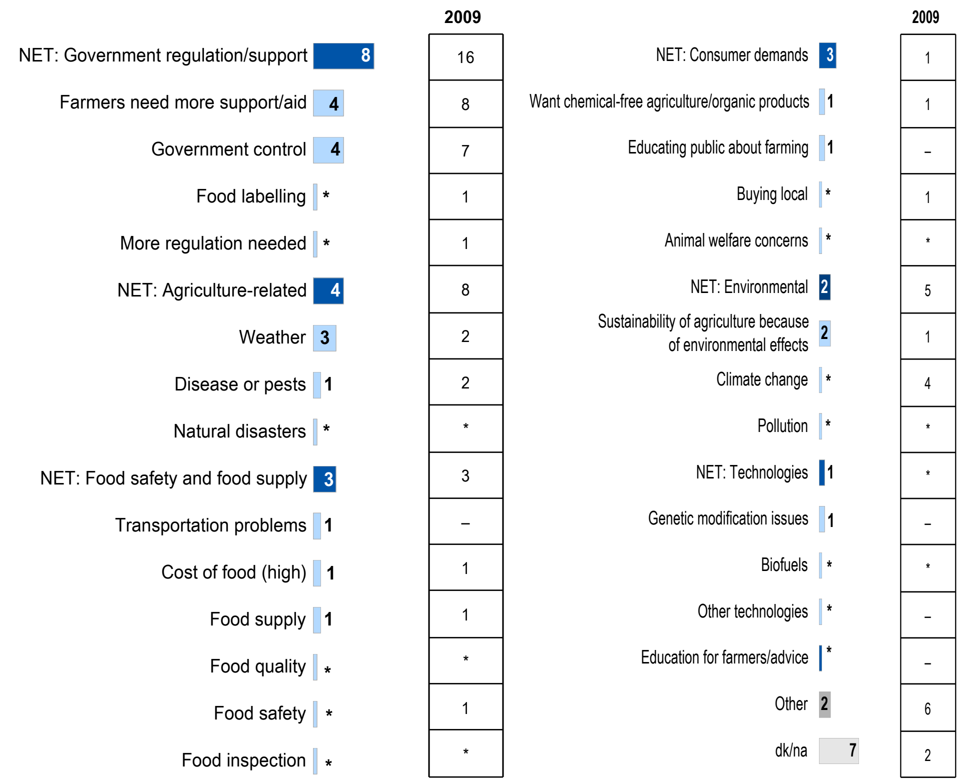
Asked unprompted



* Less than one percent

Q.3

Most important issue facing Canadian agriculture (continued)



* Less than one percent

Smaller numbers of producers cite rural communities or sustainability of Canadian agriculture (9%), government regulation or support (8%), agriculture-related crises or risks, such as weather (4%), food safety and food supply (3%), consumer demands (3%) and environmental issues (2%). Clearly, these issues, while important to some producers, do not have the same degree of salience compared to economic or financial matters.

Although economic concerns remain high, the importance of these issues has fallen since 2009. Since 2009, there have also been declines in the proportion of producers who cite government regulation or support, and agriculture-related crises or risks.

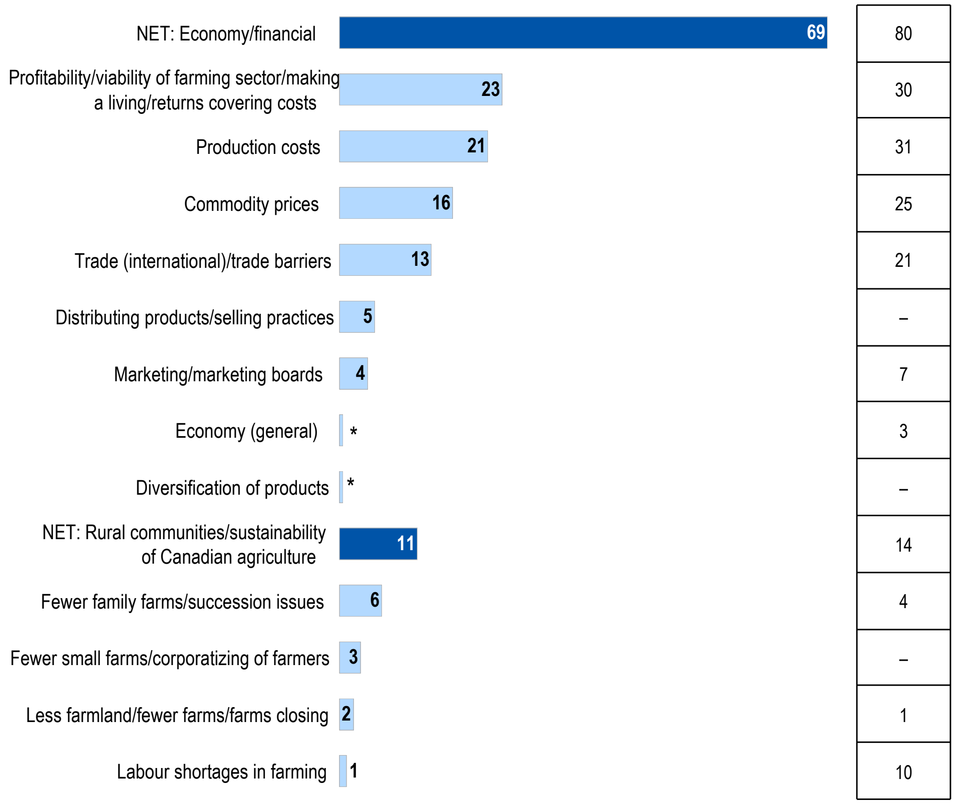
Among Canada's regions, producers in Ontario are more likely than average to mention government regulation or support (14%). Those in Manitoba are more inclined than average to cite agriculture-related crises or risks (9%). Environmental issues are more frequently mentioned by Quebec producers (10%).

At the end of the survey, producers were asked the same question again to see if their opinion on the most important agricultural issue had changed after responding to other questions in the survey. Economic or financial issues remained at the top of the list of the most important agricultural issues, mentioned by seven in ten producers (69%).

Most important issue facing Canadian agriculture

Q.33

Follow-up – asked unprompted



* Less than one percent

Q.33

Most important issue facing Canadian agriculture (continued)

		2009
NET: Government regulation/support	8	15
Farmers need more support/aid	4	9
Government control	3	5
More regulation needed	1	1
Food labelling	*	*
NET: Food supply/food safety	6	10
Food safety	3	6
Food supply	1	2
Food quality	1	2
Cost of food (high)	*	1
Food inspection	*	*
Transportation problems	*	–
NET: Environmental	5	10
Sustainability of agriculture because of environmental effects	3	3
Pollution	1	*
Climate change	1	5
Lack of biodiversity	*	–

		2009
NET: Agriculture-related crises or risks	4	4
Weather	3	2
Natural disasters	1	1
Disease or pests	*	1
NET: Consumer demands	3	1
Educating the public about farming	1	–
Want chemical-free agriculture/organic products	1	1
Buying local	1	*
Animal welfare concerns	*	–
NET: Technolgies	1	*
Genetic modification issues	1	*
Biofuels	*	*
Other technologies	*	–
Education for farmers/advice	*	–
Other	3	6
dk/na	6	3

* Less than one percent

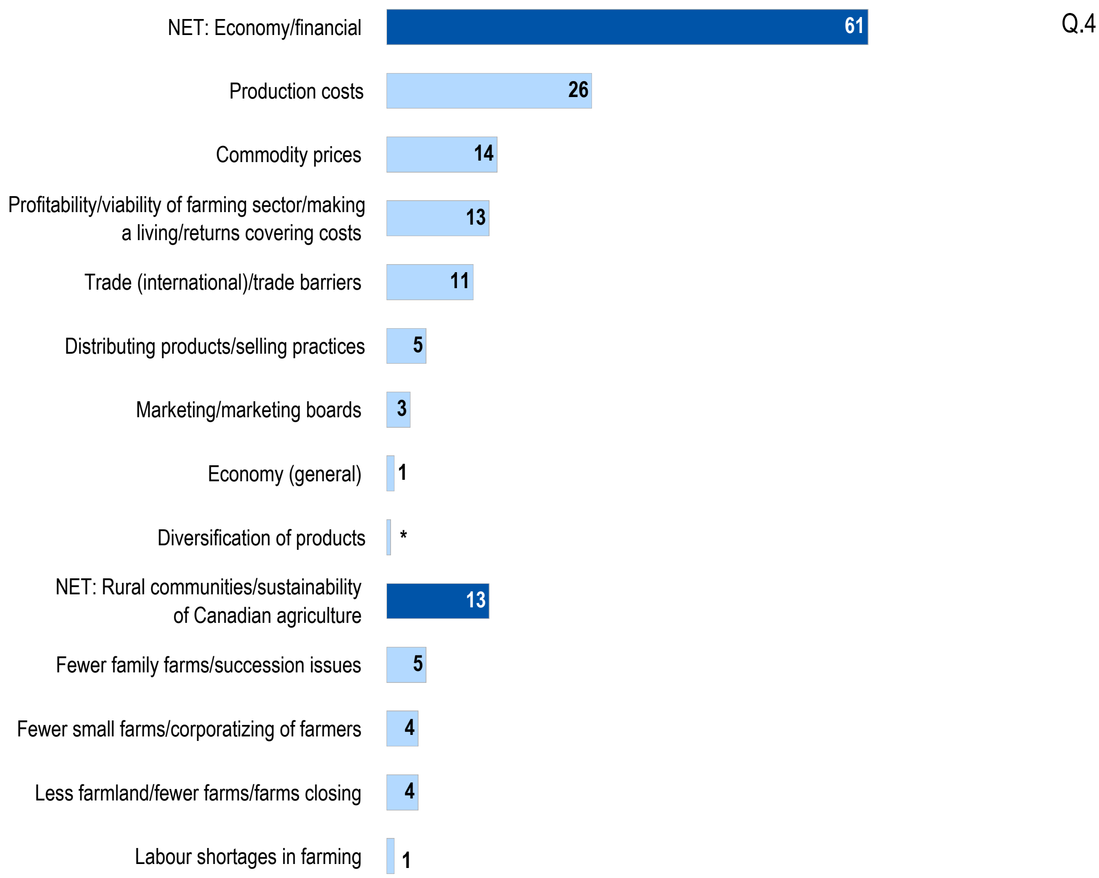
The salience of other issues remained relatively stable: rural communities or sustainability of Canadian agriculture (11%), government regulation or support (8%), food safety and food supply (6%), environmental issues (5%), agriculture-related crises or risks, such as weather (4%), and consumer demands (3%).

Most important agriculture issue five years from now. Near the beginning of the survey, producers were also asked their opinion as to what they think will be the most important issue facing Canadian agriculture over the next five years (asked unprompted).

The issues and general ranking are similar to that found with respect to the current most important agriculture issue.

Most important issue facing Canadian agriculture in next five years

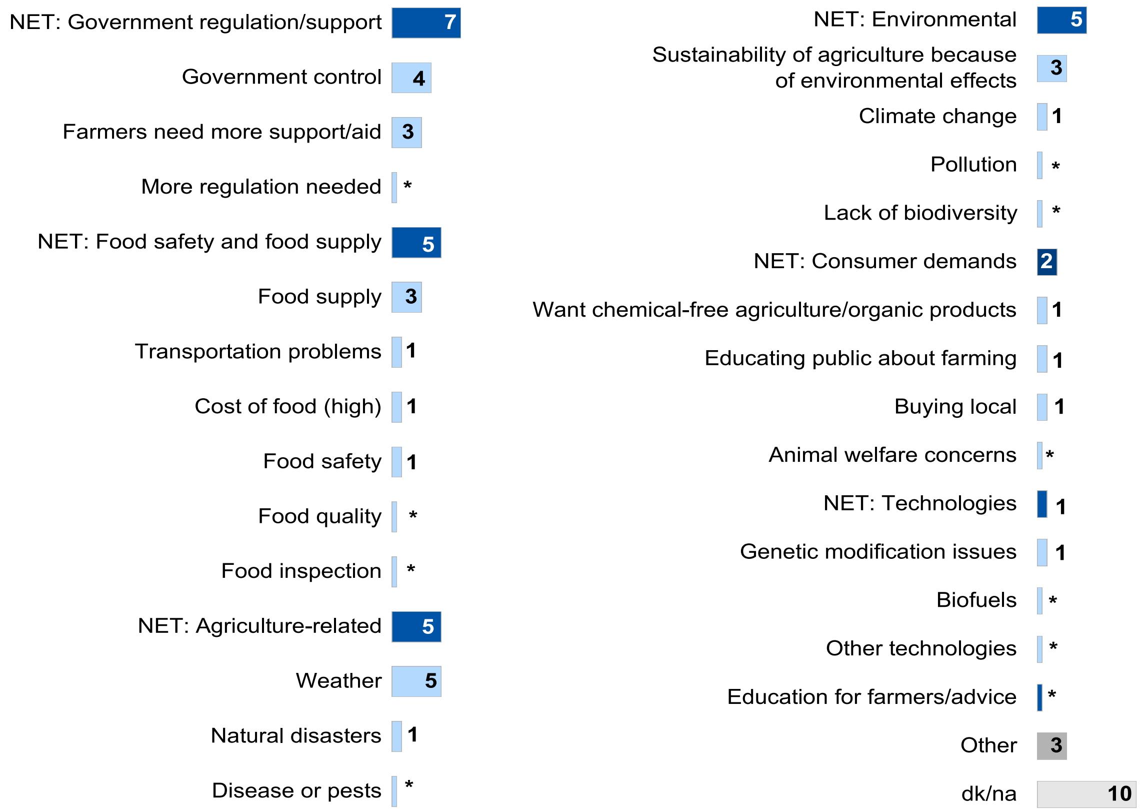
Asked unprompted



* Less than one percent

Q.4

Most important issue facing Canadian agriculture in next five years (continued)



* Less than one percent

Top-of-mind, economic or financial issues are the most frequently mentioned issue over the next five years, cited by six in ten producers (61%). These encompass issues including production costs (26%), commodity prices (14%), profitability or viability of farming sector (13%), trade barriers (11%), distributing products or selling practices (5%), marketing or marketing boards (3%), and others.

Smaller numbers of producers cite rural communities or sustainability of Canadian agriculture (13%), government regulation or support (7%), food safety and food supply (5%), agriculture-related crises or risks, such as weather (5%), environmental issues (5%) and consumer demands (2%).

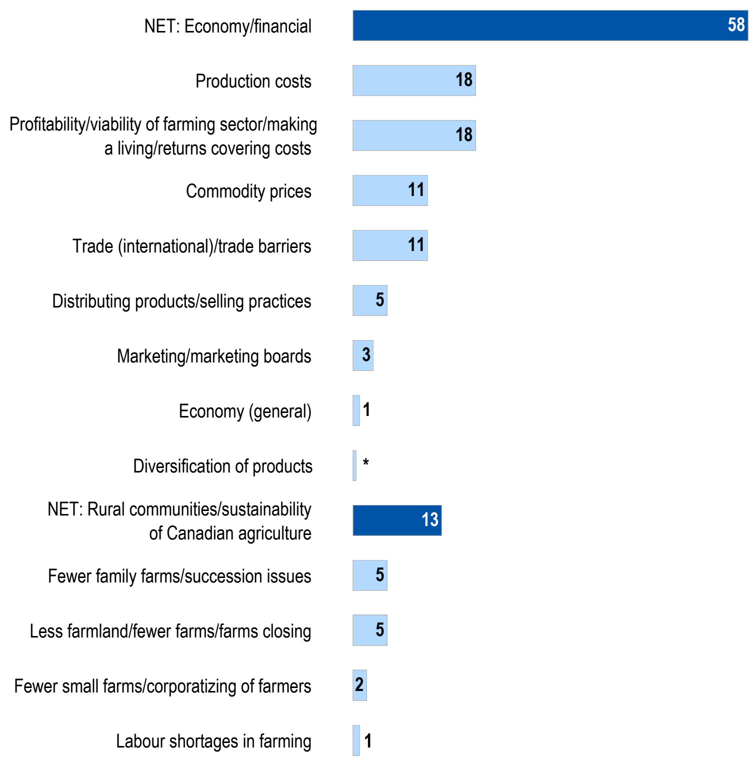
Among Canada's regions, Quebec producers are less likely than average to mention economic or financial issues (53%), but more inclined than average to mention environmental issues (17%). Those in Atlantic Canada are more inclined than average to cite rural communities or sustainability (23%), while those in Manitoba are more likely than average to mention agriculture-related crises or risks (10%).

At the end of the survey, producers were asked the same question again to see if their opinion on the most important agricultural issue over the next five years had changed after responding to other questions in the survey. Economic or financial issues remained at the top of the list of the most important agricultural issues over the next five years, mentioned by six in ten (58%).

Most important issue facing Canadian agriculture in next five years

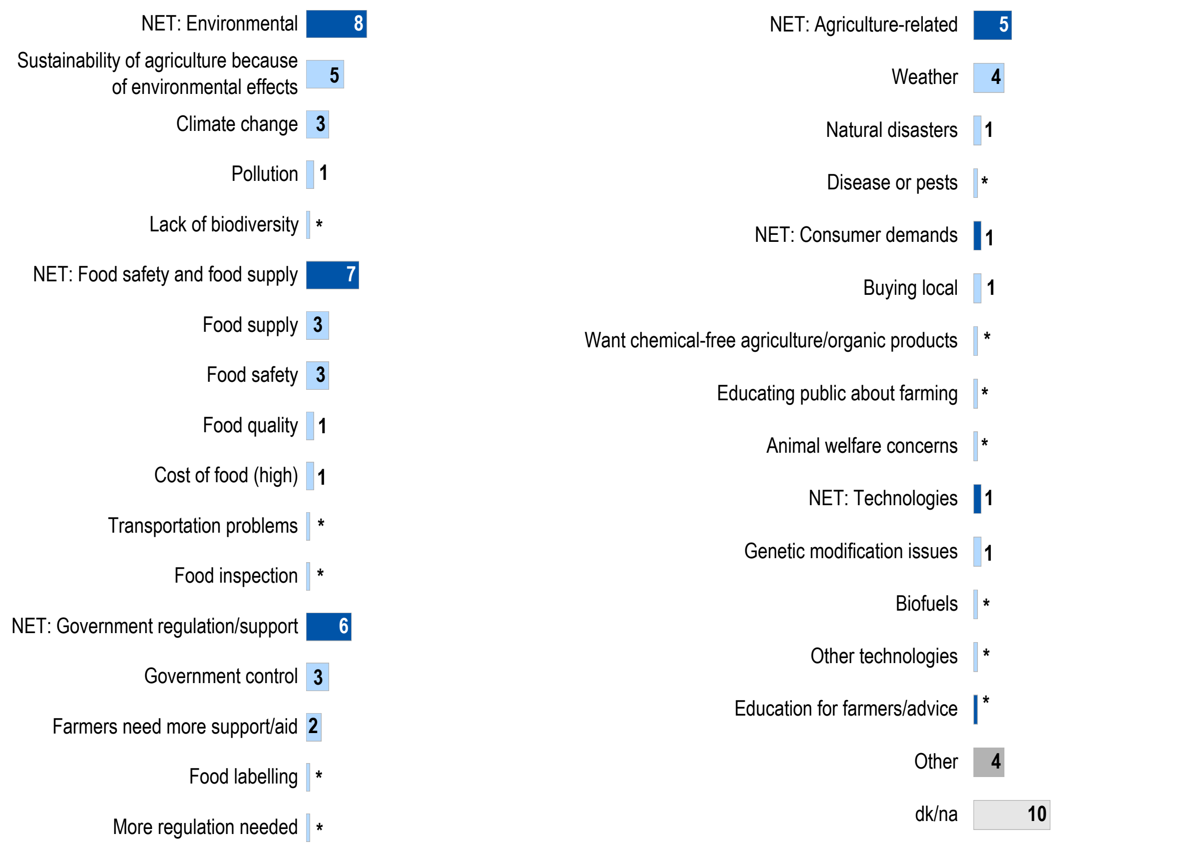
Q.34

Follow-up – asked unprompted



* Less than one percent

Most important issue facing Canadian agriculture in next five years (continued)



* Less than one percent

The importance of other issues remained relatively stable: rural communities or sustainability of Canadian agriculture (13%), environmental issues (8%), food safety and food supply (7%), government regulation or support (6%), agriculture-related crises or risks, such as weather (5%), and consumer demands (1%).

Perceptions of agricultural activities in community

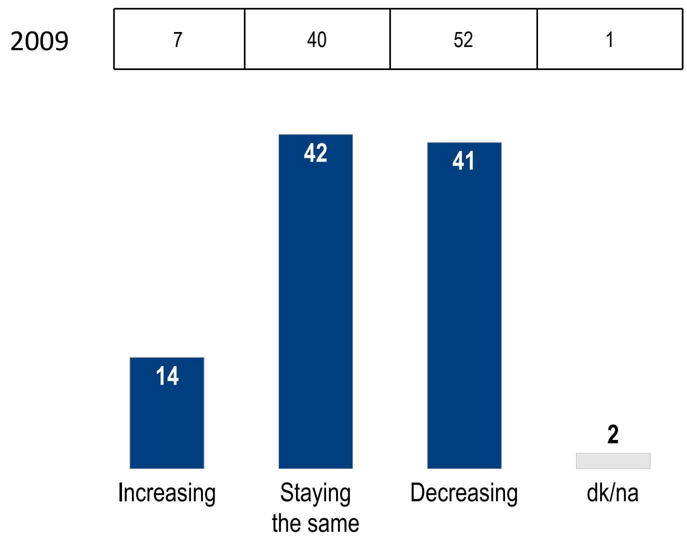
Producers are divided as to whether agricultural activities in their community are staying the same or declining.

When asked to think about agricultural activities in their community, producers are divided between those who think they are staying the same (42%) or decreasing (41%). Just over one in ten think they are increasing (14%).

Since 2009, the number of producers who think agricultural activities in their community are decreasing has fallen, while the proportion who think they are increasing has grown.

Extent of agricultural activity in your community

Q.12



There are notable differences in perceptions across the country. Majorities of producers in Atlantic Canada (69%) and British Columbia (59%) think agricultural activities in their community are decreasing. Most producers in Ontario and Quebec also believe these activities are decreasing. In Saskatchewan and Manitoba, majorities think these activities are staying the same, while most producers in Alberta also hold this view.

Producers whose household receives off-farm income are more likely than those who do not to think agricultural activities in their community are decreasing, while those with no off-farm income are more likely to think these activities are staying the same.

Agriculture and the environment

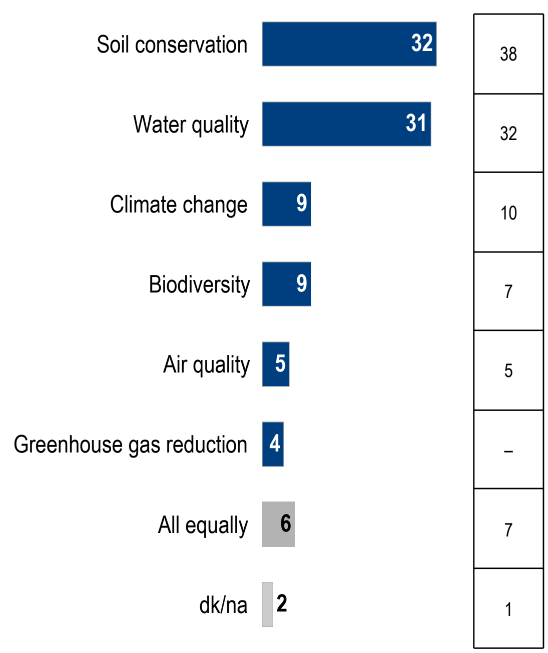
This section examines producers' views on agriculture and the environment, including environmental priorities related to agriculture, the impact of agricultural activities on the environment, perceptions of actions taken by agricultural producers to minimize their impact, and whether they sell some of their production locally.

Environmental priorities. Soil conservation and water quality are seen as the top environmental priorities, ahead of climate change, biodiversity, air quality and greenhouse gas reduction.

When asked which of six environmental priorities for agriculture they care about the most, the top mentions are soil conservation (32%) followed by water quality (31%). About one in ten or fewer producers choose climate change (9%), biodiversity (9%), air quality (5%) and greenhouse gas reduction (4%). Six percent say they care about all these issues equally.

Environmental priorities for agriculture

Q.18

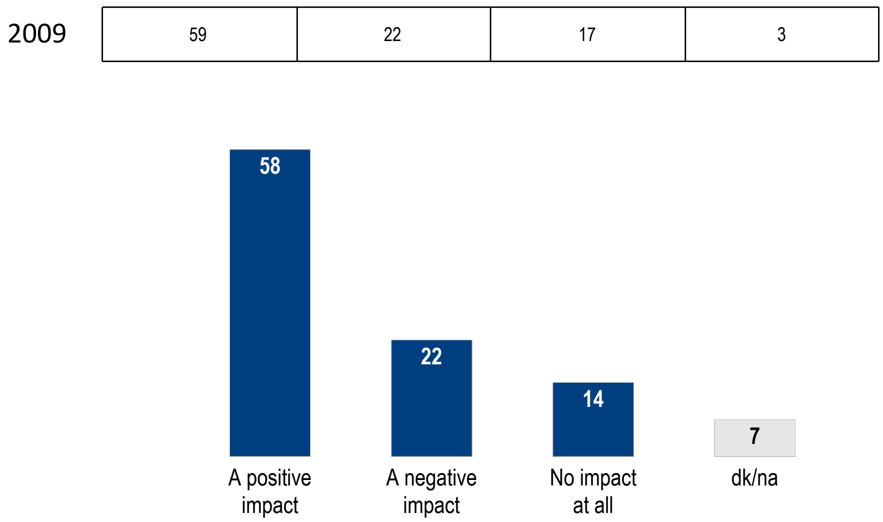


Producers in Saskatchewan are more likely than average to cite soil conservation (44%). Those residing in Alberta are more likely than average to choose air quality (38%). Climate change is more likely than average to be mentioned by producers in Atlantic Canada. Producers in British Columbia are more likely than average to mention biodiversity (17%). Greenhouse gas reduction is a higher priority for producers in Quebec (12%).

Impact of agricultural activities on the environment. A majority of producers think agricultural activities have a positive impact on the environment.

Impact of agricultural activities on environment

Q.19



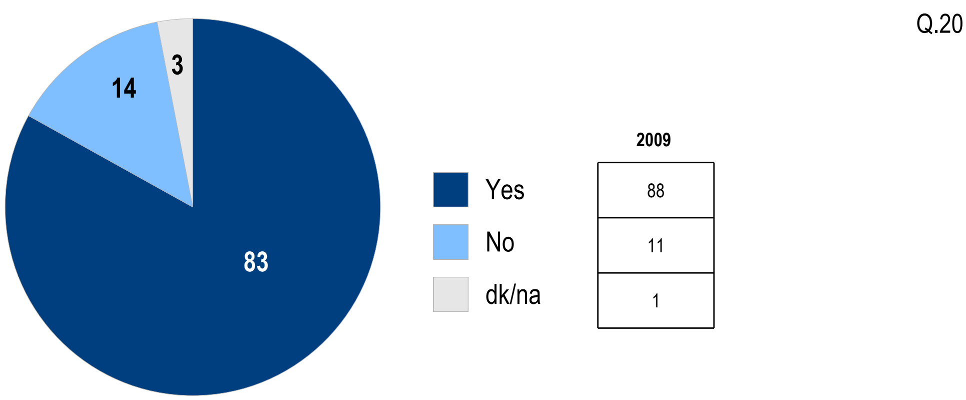
Most producers believe agricultural activities have a positive impact (58%) on the environment. A smaller proportion (22%) think the impact is negative, while fewer (14%) see no impact at all. Seven percent offer no opinion.

These figures have not changed significantly since 2009.

Majorities of producers in all regions, but Quebec, think agricultural activities have a positive impact on the environment. Quebec producers are more likely than others to believe these activities have a negative impact on the environment (40%).

Perceptions of the actions of agricultural producers on the environment. Producers continue to have a positive perception of the actions of agricultural producers on the environment.

Producers taking appropriate actions to minimize impact of agricultural activities on environment

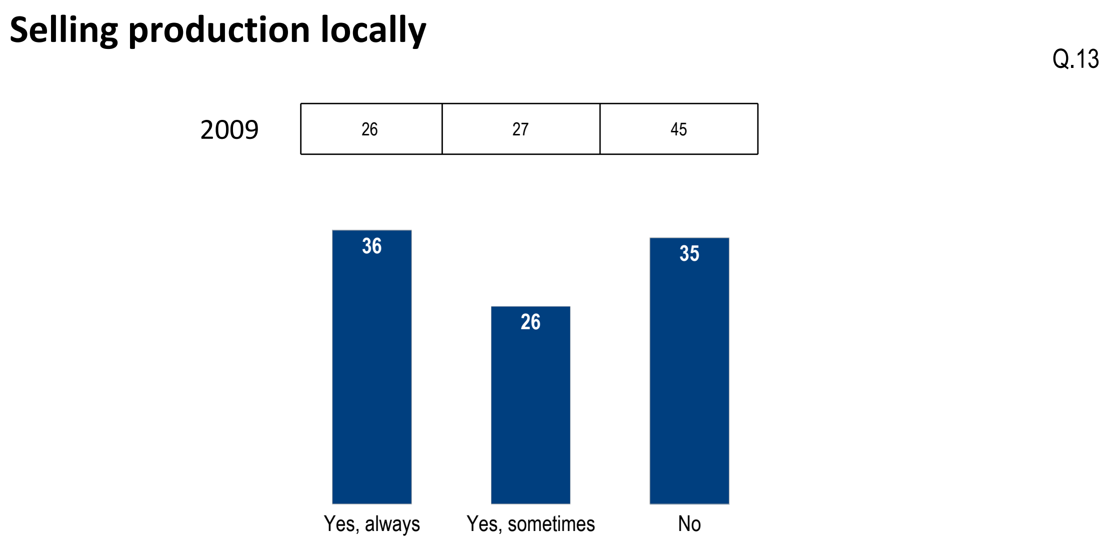


When asked to assess the actions of agricultural producers, just over eight in ten (83%) producers think they are taking the appropriate actions to minimize the impact of their agricultural activities on the environment, while very few (14%) say they are not. The proportion who think producers are taking appropriate actions has declined slightly since 2009.

Large majorities of producers across the country believe that agricultural producers are taking the appropriate actions regarding the environment, but this proportion is somewhat lower in British Columbia (72%) and Quebec (76%).

Producers with annual farm sales of $250,000 or more are more inclined than others to believe agricultural producers are taking the appropriate actions regarding the environment.

Selling production locally. A majority of producers say they sell some of their production locally at least sometimes.



When asked if they sell some of their production locally, meaning selling to consumers within 100 km or their farm operation, six in ten report doing this always (36%) or sometimes (26%). One-third (35%) say they do not. Since 2009, there has been a considerable increase in the proportion who report doing this always, and a corresponding decline in those who say they never do this.

Producers in Quebec (48%), British Columbia (47%) and Ontario (46%) are more likely than average to report that they always sell their production locally. Those residing in Saskatchewan and Manitoba are more inclined than average to say they do not do this.

Producers with annual farm sales of below $100,000 are more inclined than others to report that they always sell their production locally. Those with annual farm sales of between $100,000 and below $250,000 are more inclined to say they do not do this.

Scientific research in agriculture

This section examines producers' priorities for scientific research. Producers were read a list of eight possible objectives for scientific research in agriculture. To gauge the relative importance of each item, the choices were presented in four randomized pairs of statements, and respondents were asked to choose which of the two statements was of higher priority.

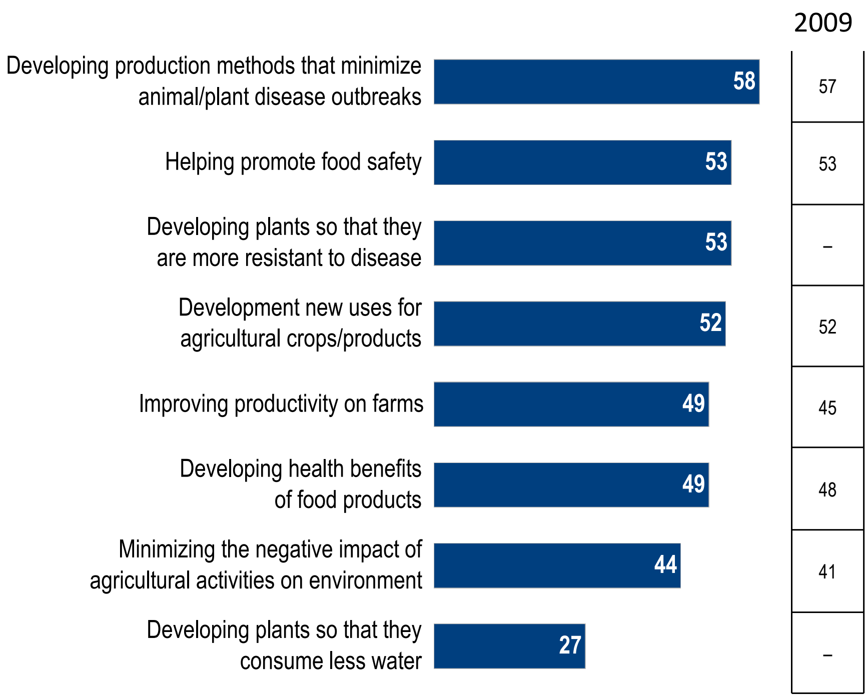
Developing production methods that minimize animal and plant disease outbreaks is seen by producers as the most important objective for scientific research, while developing plants to make them consume less water is seen as the least important objective.

The highest objective for scientific research is developing production methods that minimize animal and plant disease outbreaks (58%). Majorities also assign a high priority to developing plants so that they are more resistant to disease (53%), helping to promote food safety (53%), and developing new uses for agricultural crops or products (52%).

Smaller proportions, more than four in ten, place a higher priority on developing health benefits of food products (49%), improving productivity on farms (49%) and minimizing the impact of agricultural activities on the environment (44%).

Q.17

Scientific research in agriculture



Fewer than three in ten (27%) assign a high priority to developing plants so that they consume less water.

Producers in Quebec are more likely than average to assign a higher priority to minimizing the impact of agricultural activities on the environment and developing health benefits of food products. Those residing in Saskatchewan place a higher than average priority on developing plants so that they are more resistant to disease. British Columbia producers place a higher than average priority on developing plants so that they consume less water (Ontario producers are less likely to emphasize this priority), and a lower than average emphasis on developing new uses for agricultural crops or products.

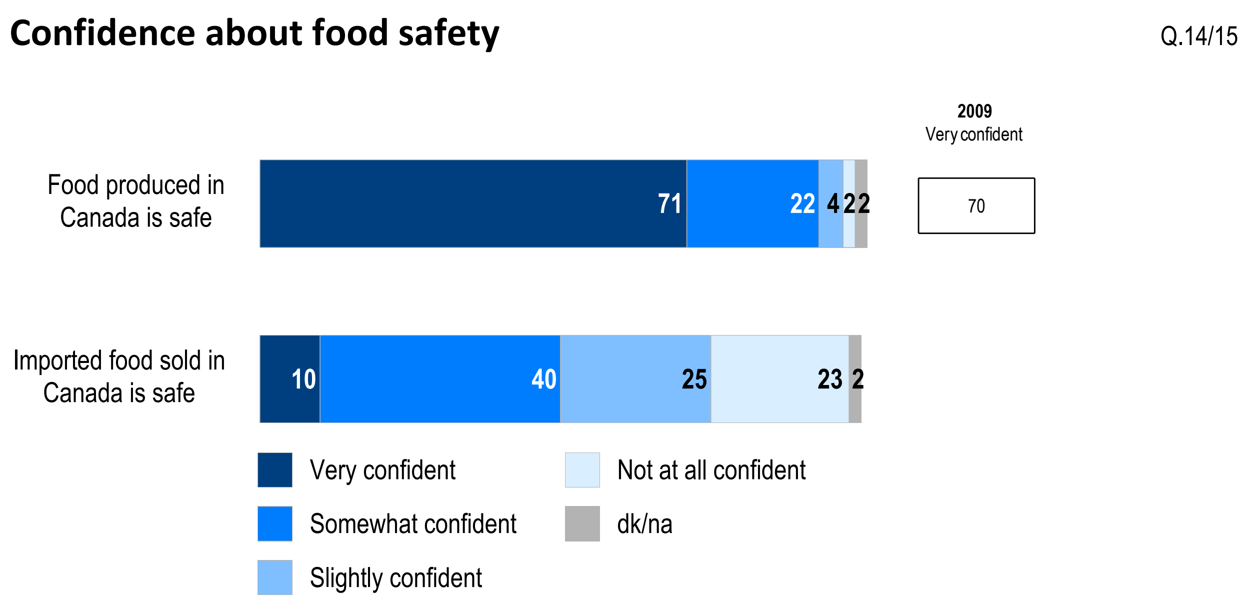
Producers with annual farm sales of below $100,000 place a higher priority than others on developing health benefits of food products and minimizing the negative impact of agricultural activities on the environment.

Food safety

This section examines producers' perceptions of food safety, including confidence in food produced in Canada, confidence in food and imported food sold in Canada, and the likelihood of food contamination at a list of places.

Confidence in food produced and imported food sold in Canada. Producers express more confidence in the safety of food produced in Canada than they do in the safety of imported food sold in Canada.

An overwhelming majority of producers continue to express confidence in the safety of food produced in this country. Just over nine in ten producers (93%) are confident that food produced in Canada is safe, including seven in ten (71%) who are very confident and two in ten (22%) who are somewhat confident. Almost none (2%) are not at all confident.



These figures have not changed significantly since 2009.

Producers are divided as to their confidence in the safety of imported food sold in Canada. Half (50%) are confident that imported food sold in Canada is safe, including only one in ten (10%) who are very confident and four in ten (40%) who are somewhat confident. Half (48%) are not confident, including one-quarter (25%) who are slightly confident and one-quarter (23%) who are not at all confident.

Strongly expressed confidence in the safety of food produced in Canada is higher in Ontario (78%), and lower in Quebec (65%) and British Columbia (62%).

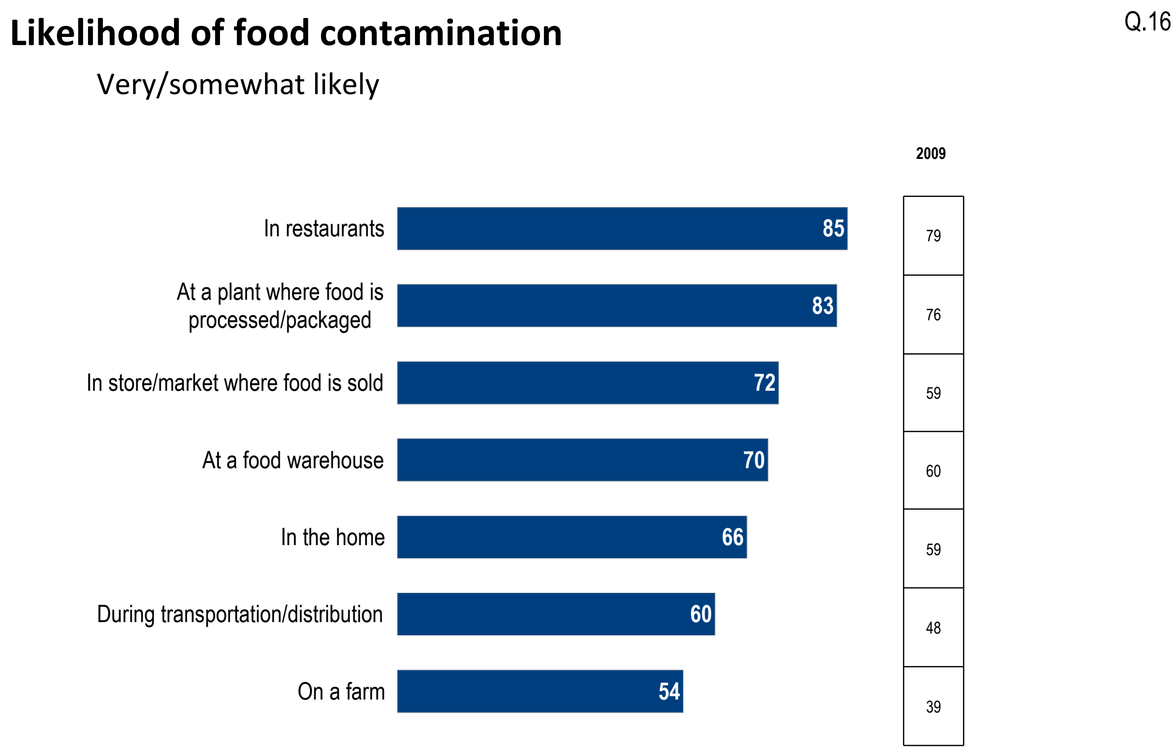
Strongly expressed confidence in the safety of food produced in Canada is also higher among producers with annual farm sales of $250,000 or more.

Confidence in the safety of imported food sold in Canada is higher among producers in Saskatchewan, Manitoba and Alberta, and lower among those who reside in Ontario, Quebec and Atlantic Canada.

Likelihood of food contamination at a list of places. Producers are the most likely to perceive restaurants, and food processing and packaging plants as places of possible food contamination, and least inclined to say that a farm is a source of contamination.

Producers were asked to consider the likelihood that food contamination might happen in a number of places. Restaurants (85%), and food processing and packaging plants (83%) are most often seen as the places where food contamination is very or somewhat likely to occur.

Large majorities of about seven in ten each think it is likely that food contamination can happen at the store or market where food is sold, at a food warehouse and in the home.



Six in ten producers say food contamination is likely to happen during transportation or distribution.

Producers are least likely to think that food contamination can happen in the home, but a majority of 54 percent think this is at least somewhat likely.

Since 2009, there have been increases in producers' perceptions of the likelihood of food contamination at all these places; the largest increases have come in the proportions who think it is likely that food contamination can occur on a farm, or in the store or market where food is sold.

Quebec producers are less likely than average to think food contamination can occur at any of these places. Producers in Ontario are more likely than average to think it is likely that food contamination can happen in the home, at a food warehouse and on a farm. Those residing in British Columbia are more likely than average to think it can happen in the store or market where food is sold, in the home, during transportation or distribution, and on a farm. Alberta producers are more likely than average to think it is likely to happen at food processing and packaging plants. Producers in Atlantic Canada are more inclined than average to think it can happen in the home.

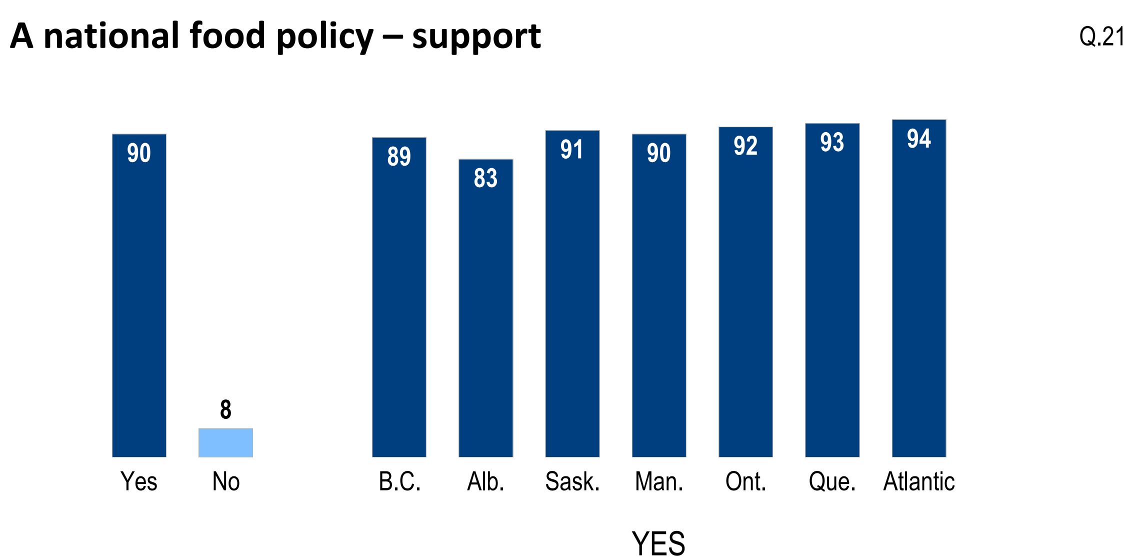
Producers with annual farm sales of below $100,000 are more inclined than others to think food contamination can happen during transportation or distribution, and in the store or market where food is sold.

National food policy

This section examines producers' attitudes toward Canada adopting a food policy and the preferred priorities for this policy.

Producers express overwhelming support for a national food policy. When it comes to priorities, they are most likely to think ensuring the Canadian agriculture sector remains profitable should be top objective of this policy, and least likely to mention increasing access to affordable and nutritious food globally.

When producers are asked if Canada should have a food policy that sets out a vision for agricultural policy and includes support for agriculture, nine in ten (90%) express support.



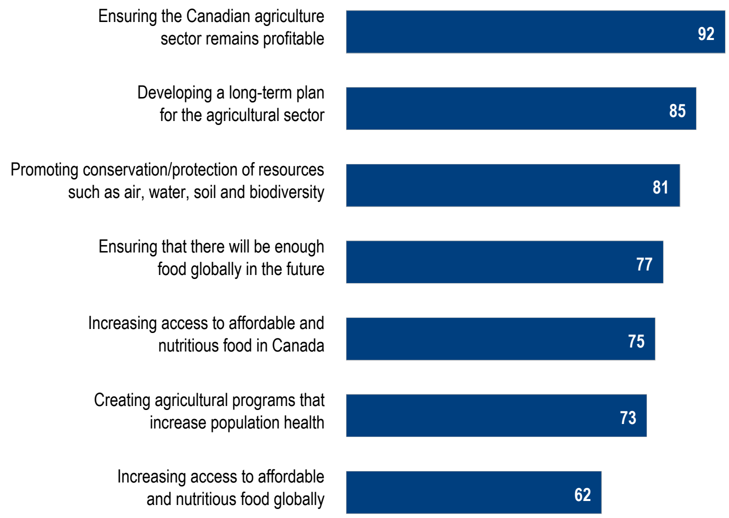
Support for a national food policy is consistent across nearly all regional and demographic subgroups, but it is slightly lower in Alberta.

In a follow-up question, producers were read a list of possible objectives for a national food policy and asked what level of priority they felt Canada should place on specific objectives: a high priority, low priority or no priority at all.

Majorities of producers place a high priority on all of the listed objectives, but the highest priority is ensuring the Canadian agriculture sector remains profitable. The lowest priority is increasing access to affordable and nutritious food globally.

A national food policy – priority items Q.22

High priority



Nine in ten (92%) place a high priority on ensuring the Canadian agriculture sector remains profitable.

Large majorities of over seven in ten place a high priority on developing a long-term plan for the agricultural sector (85%), on promoting conservation and protection of resources (81%), ensuring that there will be enough food globally in the future (77%), increasing access to affordable and nutritious food in Canada (75%), and creating agricultural programs that increase population health (73%).

The lowest priority for a national food policy is increasing access to affordable and nutritious food globally (62%).

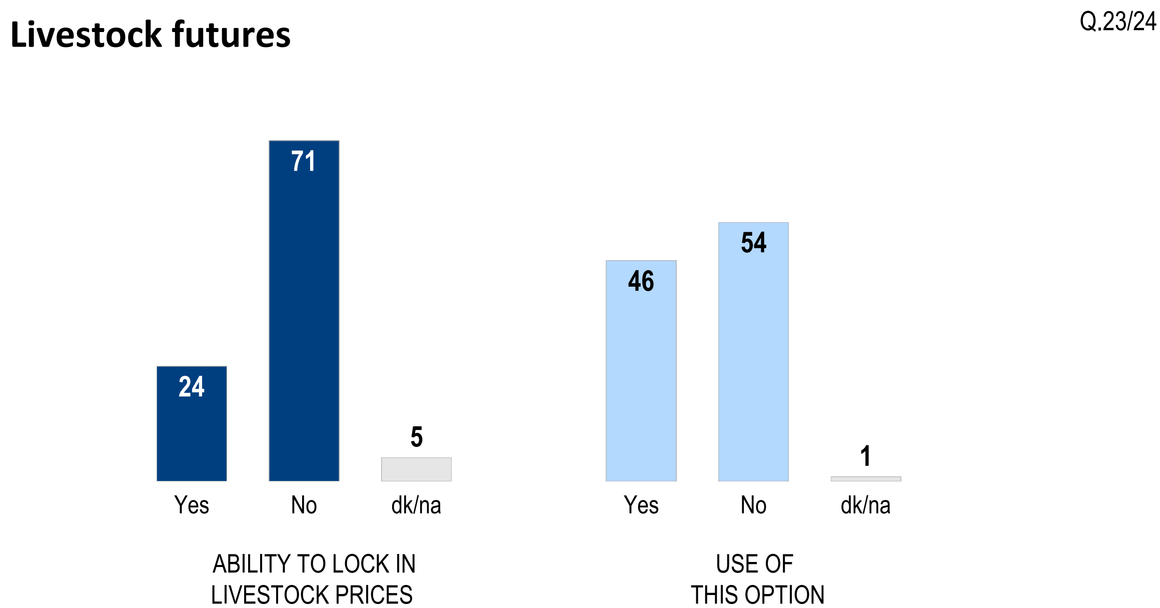
Producers in British Columbia are more likely than average to place a high priority on promoting conservation and protection of resources, increasing access to affordable and nutritious food in Canada, and ensuring that there will be enough food globally in the future. Those residing in Atlantic Canada are more likely than average to put a high priority on increasing access to affordable and nutritious food in Canada, and creating agricultural programs that increase population health. Quebec producers place a higher than average priority on promoting conservation and protection of resources. Producers in Alberta are less likely than average to put a high priority on developing a long-term plan for the agricultural sector, promoting conservation and protection of resources, increasing access to affordable and nutritious food in Canada, and creating agricultural programs that increase population health.

Producers with annual farm sales of below $100,000 are more inclined than others to place a high priority on that there will be enough food globally in the future, and increasing access to affordable and nutritious food globally.

Livestock futures

This section examines livestock producers' ability and use of locking-in prices of livestock through futures, insurance or other ways, and the percentage of the sale price they would be willing to pay for this option.

Livestock producers only (not all producers) were asked if they currently have the ability to lock in a price six months before selling their livestock through futures, insurance or other ways. A total of one-quarter (24%) say they do but most (71%) say they do not. Almost half (46%) of those who have this ability do use this option; the remainder (54%) do not.

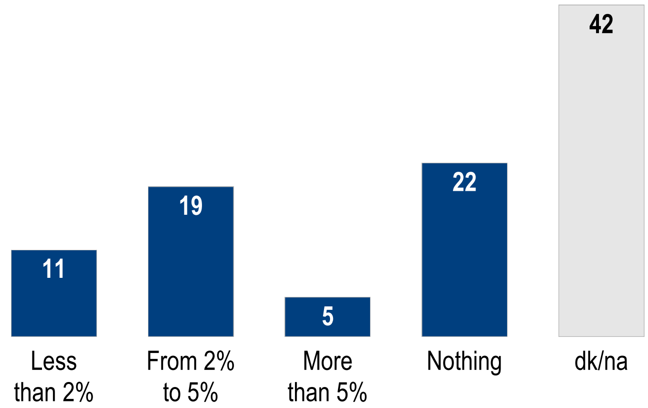


Livestock producers with annual farm sales of $250,000 or more are more inclined than others to say they have the ability to lock in prices, and are more likely to report using this option.

In a follow-up question, all livestock producers were asked what they would be willing to pay as a percentage of sale price for this option, per animal. A total of one-third would be willing to pay something: less than two percent (11%), from two to five percent (19%) or more than five percent (5%). Twenty-two percent say they would pay nothing and four in ten (42%) offer no opinion.

Willingness to pay for livestock futures

Q.25



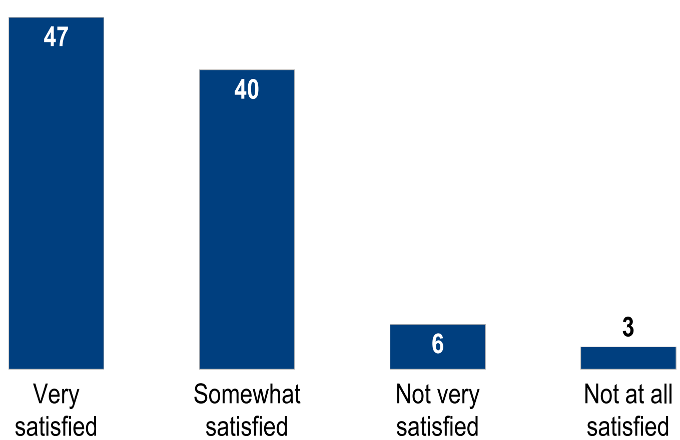
Access to agricultural products

This section examines producers' satisfaction with their access to agricultural products such as pesticides, fertilizers, seeds, veterinary drugs and veterinary vaccines, and their attitudes toward the priority the Canadian government should place on harmonizing regulations regarding access to these products.

When producers are asked if they are satisfied with their access to agricultural products such as pesticides, fertilizers, seeds, veterinary drugs and veterinary vaccines, almost nine in ten (87%) say they are satisfied with this access, including almost half (47%) who are very satisfied. Only one in ten (9%) are not satisfied.

Satisfaction with access to agricultural products

Q.26

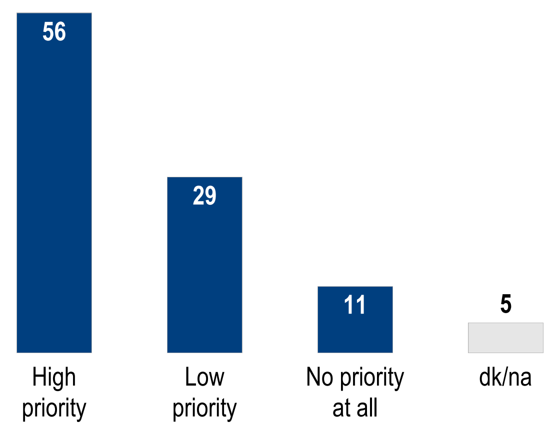


Producers in Saskatchewan are more likely than average to say they are very satisfied with their access to agricultural products (56%), while those in British Columbia (37%) and Quebec (32%) are less likely to hold this view.

In a follow-up question, producers were reminded that Canadian farmers currently have different regulations with regard to access to products such as pesticides, fertilizers, seeds, veterinary drugs and veterinary vaccines compared to Canada's trading partners. When asked if the Canadian government should place a high priority, a low priority or no priority at all on harmonizing these regulations in Canada to match those in foreign jurisdictions, almost six in ten (56%) think this should be a high priority.

Harmonizing regulations

Q.27



Atlantic producers are less likely than average to place a high priority on harmonizing these regulations (46%).

Producers with annual farm sales of $250,000 or more are more inclined than others to say this should be a high priority.

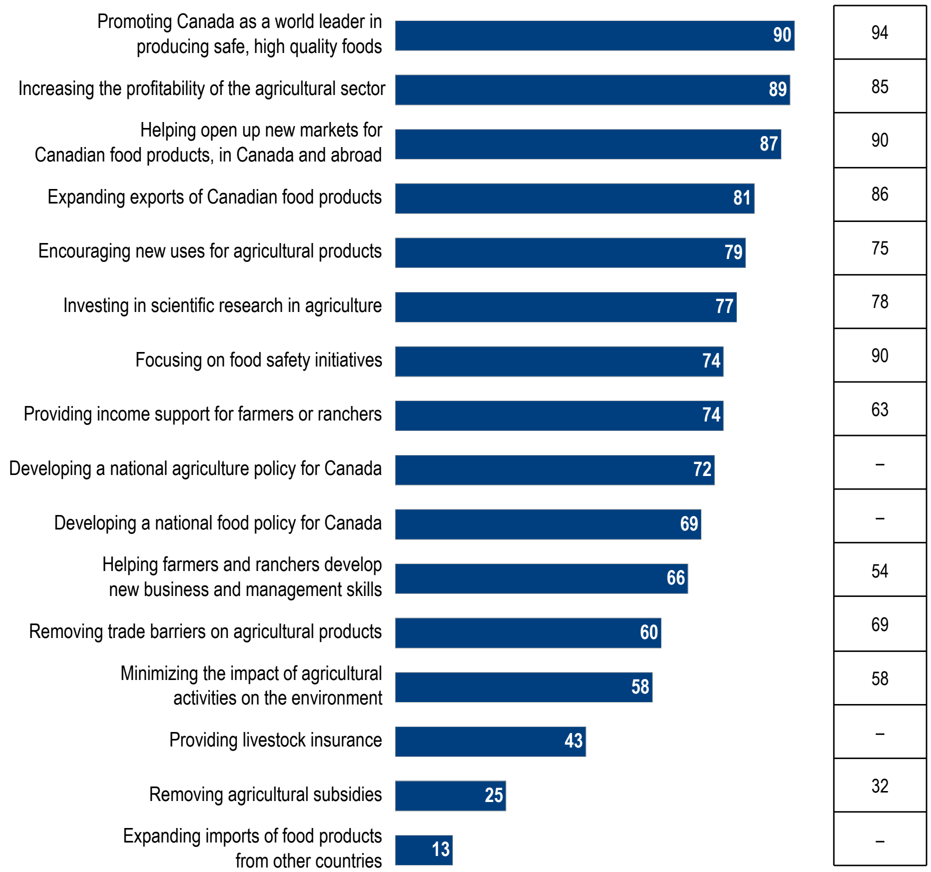
Priorities for the agriculture sector

Producers were provided with a list of agricultural priorities and asked what level of priority they felt governments should place on them: a high priority, low priority or no priority at all.

Promoting Canada as a world leader in producing safe, high quality foods; increasing the profitability of the agricultural sector; and helping open up new markets for Canadian food products in Canada and abroad are seen as the highest priorities for governments. A very low priority is placed on expanding imports of food products from other countries.

Government priorities for agriculture

High priority



About nine ten place a high priority on promoting Canada as a world leader in producing safe, high quality foods (90%), increasing the profitability of the agricultural sector (89%), and helping open up new markets for Canadian food products in Canada and abroad (87%).

Between seven and eight in ten assign a high priority to expanding exports of Canadian food products (81%), encouraging new uses for agricultural products (79%), investing in scientific research in agriculture (77%), focusing on food safety initiatives (74%), providing income support for farmers or ranchers (74%), and developing a national agriculture policy for Canada (72%).

Smaller majorities also place a high priority on developing a national food policy for Canada (69%), helping farmers and ranchers develop new business and management skills (66%), removing trade barriers on agricultural products (60%), and minimizing the impact of agricultural activities on the environment (58%).

Just over four in ten assign a high priority on providing livestock insurance (43%). One-quarter (25%) place a high priority on removing agricultural subsidies.

Other government priorities for agriculture
Asked unprompted

Q.32

* Less than one percent

At the bottom of the list of priorities is expanding imports of food products from other countries (13%).

Very few mention any other priorities.

Producers in Atlantic Canada are more likely than average to place a high priority on increasing the profitability of the agricultural sector, encouraging new uses for agricultural products, developing a national food policy for Canada, developing a national agriculture policy for Canada, and helping farmers and ranchers develop new business and management skills, but less likely to assign a high priority to removing trade barriers on agricultural products and removing agricultural subsidies.

Quebec producers are more likely than average to assign a high priority on providing income support for farmers or ranchers, developing a national food policy for Canada, helping farmers and ranchers develop new business and management skills, and minimizing the impact of agricultural activities on the environment. They are less likely to place a high priority on expanding exports of Canadian food products, helping open up new markets for Canadian food products in Canada and abroad, removing agricultural subsidies, removing trade barriers on agricultural products, encouraging new uses for agricultural products, promoting Canada as a world leader in producing safe, high quality foods, and focusing on food safety initiatives.

Ontario producers are more inclined than average to put a high priority on developing a national food policy for Canada and less likely to assign a high priority on removing trade barriers on agricultural products.

Alberta producers are more inclined than average to place a high priority on removing trade barriers on agricultural products, but are less likely to assign a high priority to developing a national food policy for Canada, helping farmers and ranchers develop new business and management skills, minimizing the impact of agricultural activities on the environment, and developing a national agriculture policy for Canada.

Producers in Manitoba and Saskatchewan are more likely than average to assign a high priority on expanding exports of Canadian food products, removing agricultural subsidies and removing trade barriers on agricultural products. Saskatchewan producers are less likely than average to place a high priority on providing livestock insurance.

British Columbia producers are more inclined than average to place a high priority on increasing the profitability of the agricultural sector, but less likely to assign a high priority to encouraging new uses for agricultural products and removing trade barriers on agricultural products.

Producers with annual farm sales of $250,000 or more are more inclined than others to assign a high priority to increasing the profitability of the agricultural sector and investing in scientific research in agriculture. Those with annual farm sales of less than $100,000 are more likely than others to place a high priority on providing income support for farmers or ranchers, minimizing the impact of agricultural activities on the environment, and expanding imports of food products from other countries.

Situations faced by the agricultural sector

Producers were provided with a list of situations and asked if their agricultural sector faced any of these in the past two years.

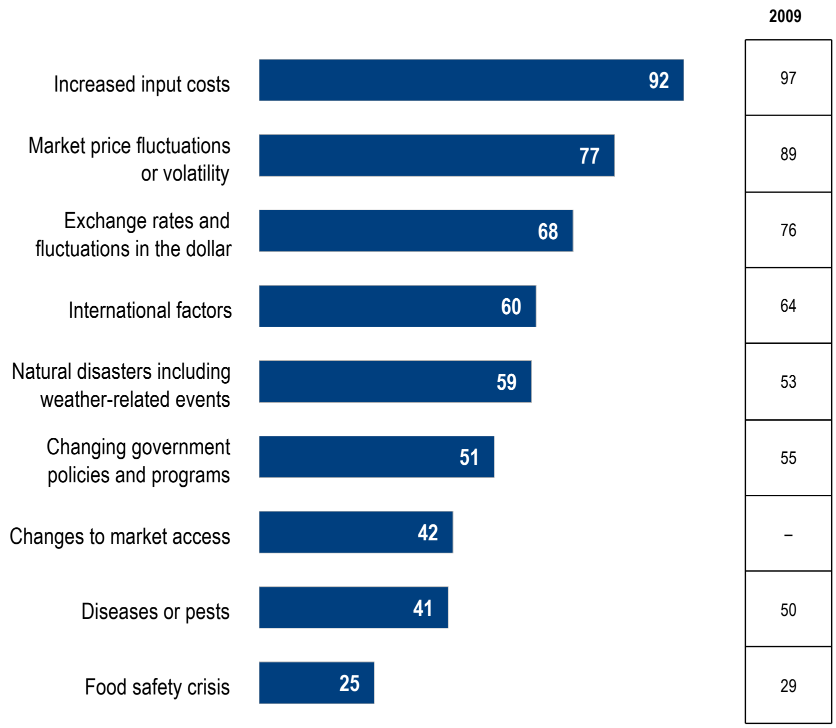
Increased input costs are at the top of the list, while the food safety crisis is at the bottom of the list of situations.

Nine in ten producers say their agricultural sector has faced increased input costs such as fuel, chemicals, fertilizers and labour costs (92%).

Majorities of seven in ten or more say their sector has confronted market price fluctuations or volatility (77%), and exchange rates and fluctuations in the dollar (68%).

Situations faced by agricultural sector in past two years

Q.28



Smaller majorities say their sector has faced international factors such as trade barriers, foreign subsidies or globalization (60%), natural disasters including weather-related events such as floods or droughts (59%), and changing government policies and programs (51%).

Smaller proportions of four in ten say their agricultural sector has faced changes to market access (42%), and diseases or pests (41%).

One-quarter of producers say their sector has faced a food safety crisis (25%).

Since 2009, there have been declines in the numbers who say their agricultural sector has faced most of these situations, particularly market price fluctuations or volatility, diseases or pests, and exchange rates and fluctuations in the dollar. There has been an increase in the proportion who say their sector has faced natural disasters.

Manitoba producers are more likely than average to say their sector faced exchange rates and fluctuations in the dollar, natural disasters, changes to market access, diseases or pests, and a food safety crisis. Saskatchewan producers are more inclined than average to say market price fluctuations or volatility, international factors and natural disasters. Those in Alberta are more likely than average to say natural disasters. Producers in Quebec and Atlantic Canada are less likely than average to say market price fluctuations or volatility, exchange rates and fluctuations in the dollar, international factors and natural disasters. Ontario producers are less inclined than average to say international factors, natural disasters, and diseases or pests.

Producers with annual farm sales of $100,000 or more are more likely to say their agricultural sector has faced international factors, and changing government policies and programs. Those with annual farm sales of $250,000 or more are also more inclined to say exchange rates and fluctuations in the dollar.

International marketing of Canadian food products

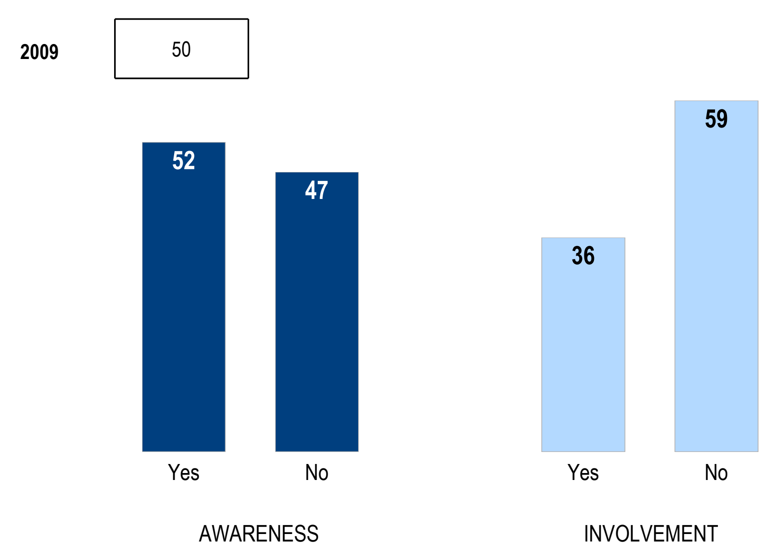
This section examines producers' awareness of the "Canada Brand" initiative and whether they would consider becoming involved in this initiative.

A slight majority of producers say they are aware of the "Canada Brand" initiative, and about one-third would consider becoming involved with the initiative.

When producers are asked if in the context of the international marketing of Canadian food products, are they aware of the "Canada Brand" initiative designed to differentiate Canadian products, five in ten (52%) say they are aware of it.

Q.29/30

Awareness of and involvement in the "Canada Brand" initiative



Awareness of the "Canada Brand" initiative is higher than average among producers in Saskatchewan (61%), and lower than average in Quebec (28%). Awareness of the initiative is also higher among producers with annual farm sales of between $100,000 and less than $250,000.

In a follow-up question, producers were asked if they would consider becoming involved in this initiative. About one-third (36%) say they would consider involvement in this initiative; six in ten (59%) would not.

Ontario and Atlantic producers are more likely than average to say they would consider becoming involved (42%), as are producers with annual farm sales of $250,000 or more.

Subjects of interest

Producers were asked, unprompted, if they wanted information from the Government of Canada on any subjects.

The survey findings indicate that one-quarter (23%) say they want some type of information. Of those who want information, the topics vary considerably: the largest numbers are interested in information on government income supports (6%), a national food policy (4%) and market development (3%).

Q.38

Subjects of interest
Asked unprompted

	2011		2011
Government income support for farmers	6	Support for young and beginning farmers	*
Developing a national food policy for Canada	4	Building a Canada Brand for food & agriculture	*
Market development	3	Training opportunities for producers	*
Beneficial environmental management practices	2	Food labelling	*
Recent research on crops, food production, etc.	2	Closed trade borders	*
Animals/livestock	2	Disaster relief for farmers	*
Access to export markets	1	Business Advisory Services	*
Science research	1	Issues facing rural communities	*
Standards and regulations for food safety	1	Genetically modified organisms (GMOs)	*
New products or new technologies	1	Commodity prices	*
Trade issues/US Farm Bill/WTO Corn challenge	1	Fuel and fertilizer prices	*
Value Chain Roundtables	1	Farm Products Council of Canada	*
Diseases or pests	1	Poultry and Dairy Marketing Boards	*
Environmental regulations and standards	1	Canadian Grain Commission	*
Business management advice for producers	1	Canadian Wheat Board	*
Farm Credit Canada	1	Canadian Dairy Commission	*
Organic food production	1	Canada Agricultural Review Tribunal	*
Farm diversification	1	Pesticides/chemicals	*
Agriculture information (general)	1	Others	2
Production costs/finance	1	None of the above	73
Canadian Food Inspection Agency	*	dk/na	4

4.0 Survey of Agricultural Associations

This section of the report presents the key findings of the survey of agriculture associations, based on an online survey of executives representing 85 agricultural associations across Canada.

The survey probed opinion about the most important issues facing agriculture in Canada today; impressions of the agriculture industry; attitudes toward environmental, scientific and food safety issues facing agriculture; support for a national food policy; views about government priorities for agriculture; situations faced by the agriculture industry; international marketing of Canadian food products; communications; awareness of intergovernmental engagement sessions; and interest in participating in an advisory panel of associations.

It is important to note that when reviewing the results of this survey that, with 85 interviews completed, the results should be reviewed as directional, and a representation of possible responses among all associations in Canada. As well, the previous survey of associations was conducted in 2007 (not 2009).

Profile of associations

The following table describes the sample of 85 agricultural associations.

Associations profile

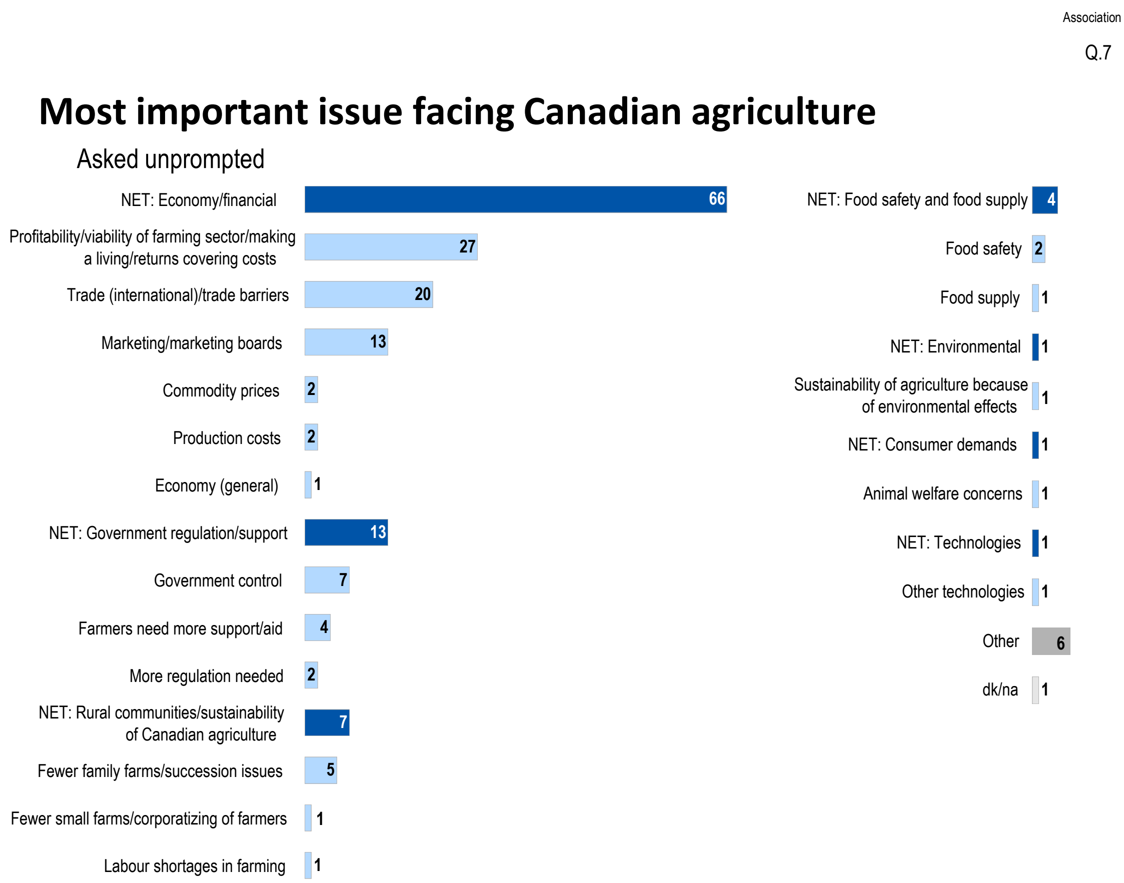
		%
Sector		
	Producers	67
	Processors	27
	Distributors	13
	Retailers	13
	Others	21
Sector		
	Field Crops (e.g., cereals, oil seeds, pulse crops, tame hay, row crops potatoes, sugar beets, other field crops)	22
	General farm sector	13
	Other livestock (e.g., sheep, bison, horses llamas, ostrich etc.)	11
	Dairy	7
	Cattle	5
	Apiculture (e.g., beekeeping)	5
	Horticulture (plants and vegetables)	5
	Pigs (e.g., farrow –to-finish, Weanlings, finishing)	4
	Food processing	4
	Viticulture (e.g., growing grapes for wine)	2
	Fruit crops	2
	Vegetable crops	2
	Organic farming	2
	Other	16
Position		
	Chief Executive Officer/ Executive Director	66
	Senior Executive or Senior Manager	15
	Board Chair	11
	Research Executive or Research Manager	4
	Board Member	1
	Other	6
Scope		
	National	55
	Regional	9
	One province only	35
Members		
	1 – 100	34
	101 – 500	24
	501 – 1,000	13
	1,001 – 5,000	8
	Over 5000	21
Number of years		
	1 – 20	31
	21 – 40	26
	41 – 80	27
	Over 80	16
Gender		
	Male	74
	Female	26
Province		
	Nova Scotia	4
	Prince Edward Island	4
	New Brunswick	1
	Quebec	7
	Ontario	48
	Manitoba	11
	Saskatchewan	7
	Alberta	11
	British Columbia	7
	Yukon	1

Most important issue/future challenge

At the beginning of the survey, association executives were asked their opinion as to what is the most important issue facing Canadian agriculture today (asked unprompted).

Top-of-mind, economic or financial issues are the most frequently mentioned issue of concern, cited by two-thirds of association executives (66%). These encompass issues including the viability of farming (27%), trade barriers (20%), marketing boards (13%) and others.

Smaller numbers of association executives cite government regulation or support (13%), rural communities or sustainability of Canadian agriculture (7%), and food safety and food supply (4%). Clearly, these issues, while important to some association executives, do not have the same urgency compared to economic or financial matters.



In a follow-up question, association executives were asked what is the single most important challenge facing their members over the next five years. A similar picture emerges when asked about future challenges. Economic or financial issues top the list of the most important agricultural challenge, mentioned by more than half of association executives (55%).

Smaller proportions of association executives cite government regulation or support (18%), and rural communities or sustainability of Canadian agriculture (6%).

Issues tracked and involvement in activities

This section examines what issues are regularly tracked by associations on behalf of their members, and their involvement in activities/programs targeting young and beginning farmers.

Issues tracked by associations on behalf of members. Association executives were asked in an aided manner if they tracked specific topics on behalf of their members.

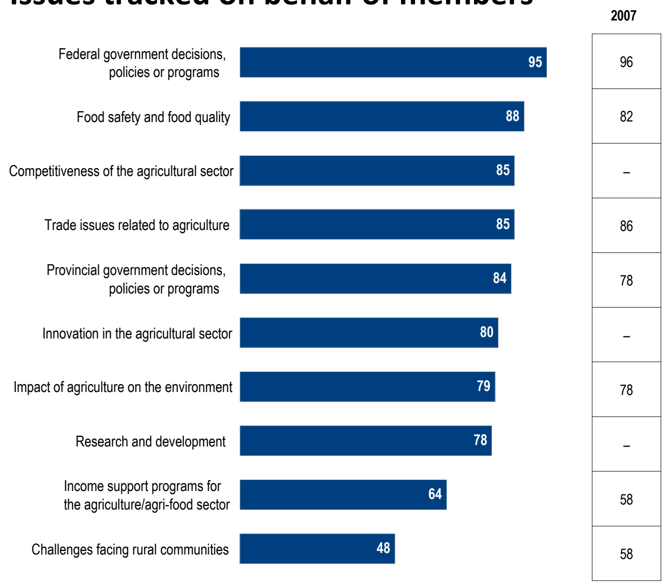
The top issues tracked by associations – mentioned by over 80 percent of association executives – are federal government decisions, policies or programs, food safety and food quality, competitiveness of the agricultural sector, trade issues related to agriculture, and provincial government decisions, policies or programs. This is followed by innovation in the agricultural sector, impact of agriculture on the environment and research and development related to new food products, fertilizers, farming methods and business models, cited by over 75 percent. About two-thirds (64%) say they track income support programs for the agriculture/agri-food sector.

The topic that is least tracked by associations are the challenges facing rural communities, tracked by 48 percent of associations.

Association

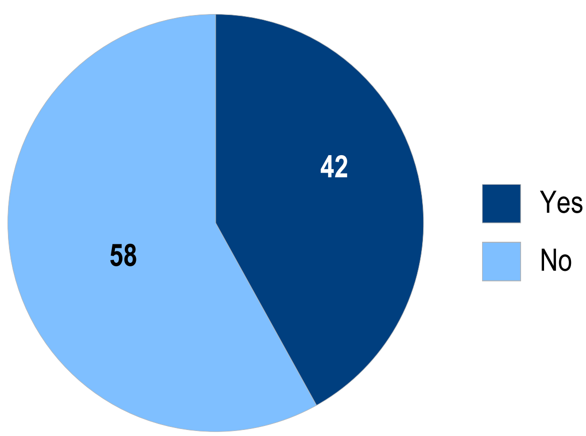
Q.9

Issues tracked on behalf of members



Involvement in activities/programs targeting young/beginning farmers. Most associations are not involved in activities or programs targeting young and beginning farmers.

Association involved in programs targeted to young farmers



Four in ten association executives (42%) say their association is involved in activities or programs targeted to young and beginning farmers, while a majority (58%) are not.

Future of farm income

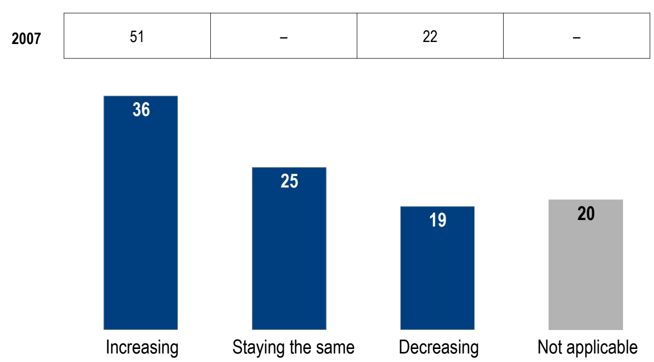
Association executives are almost twice as likely to think the net farm business income of producers in their sector will increase rather than decrease over the next five years.

When asked to look ahead to the next five years, association executives, by a two-to-one margin, anticipate that the net farm business income of producers in their sector or subsector will be increasing (36%) rather than decreasing (19%), while another one-quarter think it will be staying the same (25%). Two in ten say this question is not applicable to their association.

Association

Q.11

Net farm business income in next five years



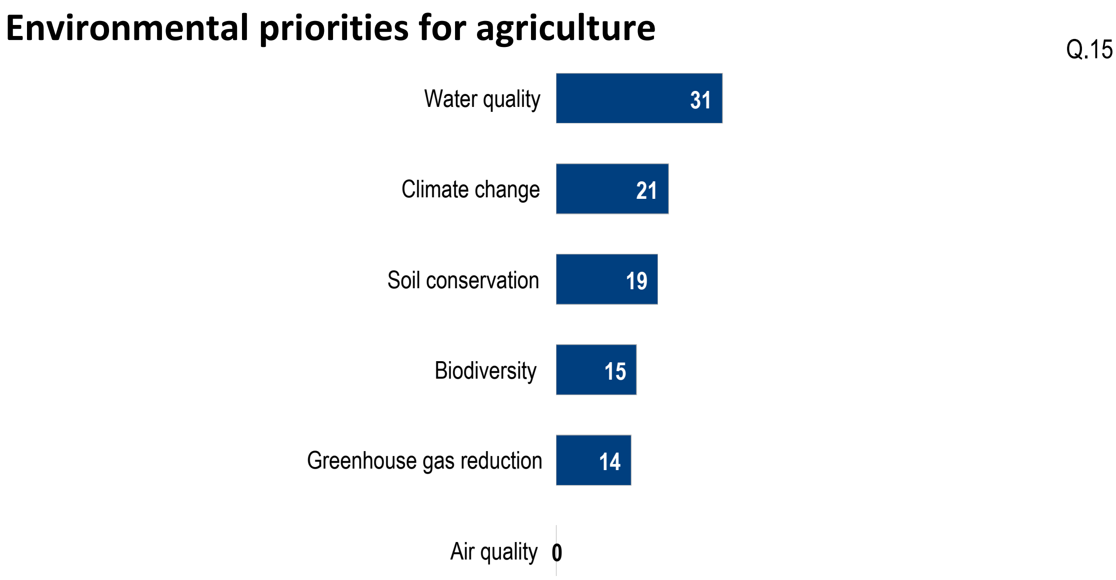
Since 2007, there has been a decline in the proportion of association executives who think the net farm business income of producers in their sector will increase.

Agriculture and the environment

This section examines association executives' views on agriculture and the environment, including environmental priorities as related to agriculture, the impact of agricultural activities on the environment, and perceptions of actions taken by agricultural producers to minimize their impact.

Environmental priorities. Water quality continues to be seen as the top environmental priority for agriculture.

When asked to choose the one environmental priority for agriculture from a pre-defined list, association executives select water quality (31%), followed by climate change (21%) and soil conservation (19%). Each of the other environmental issues explored are a priority for 15 percent or fewer association executives.

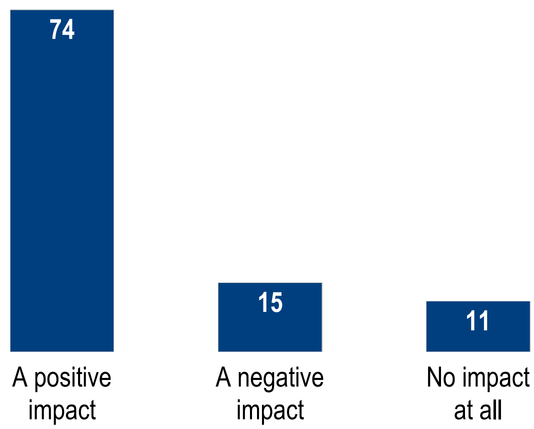


Impact of agricultural activities on the environment. An overwhelming majority of association executives believe agricultural activities have a positive impact on the environment.

A total of 74 percent of association executives believe agricultural activities have a positive impact on the environment. A small proportion (15%) think the impact is negative, or that there is no impact at all (11%).

Impact of agricultural activities on environment

Q.16

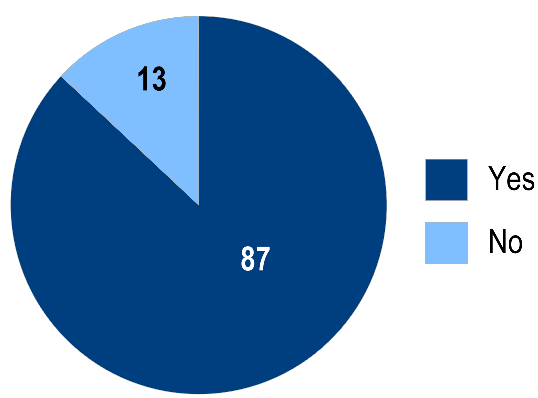


Perceptions of actions of agricultural producers re the environment. An overwhelming majority of association executives have a positive perception of the actions of agricultural producers on the environment.

When asked to assess the actions of agricultural producers, almost nine in ten (87%) think they are taking the appropriate actions to minimize the impact of their agricultural activities on the environment, while just over one in ten say they are not.

Agricultural producers taking appropriate actions to minimize impact on environment?

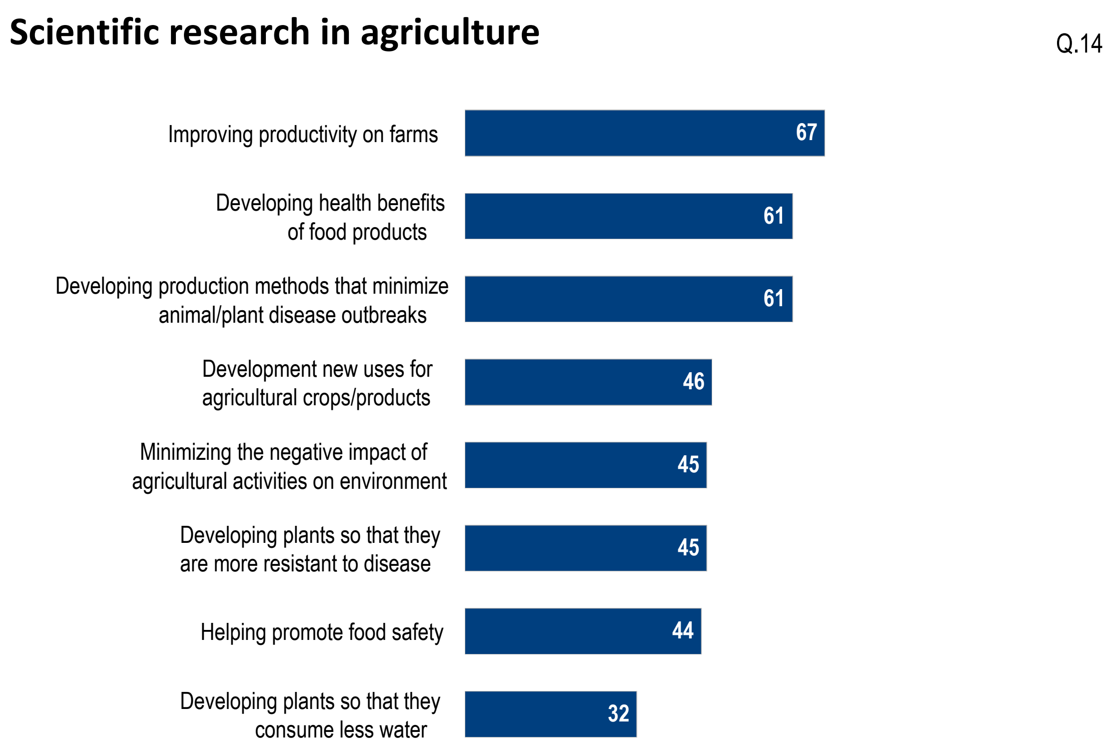
Q.17



Scientific research in agriculture

Improving productivity on farms, developing health benefits of food products, and developing production methods that minimize animal and plant disease outbreaks are seen as the most important objectives for scientific research, while developing plants to make them consume less water is seen as the least important objective.

Association executives were provided with a list of eight possible objectives for scientific research in agriculture. To gauge the relative importance of each item, the choices were presented in four randomized pairs of statements, and executives were asked to choose which of the two statements was of higher priority.



The highest objectives for scientific research are improving productivity on farms (67%), developing health benefits of food products (61%), and developing production methods that minimize animal and plant disease outbreaks (61%).

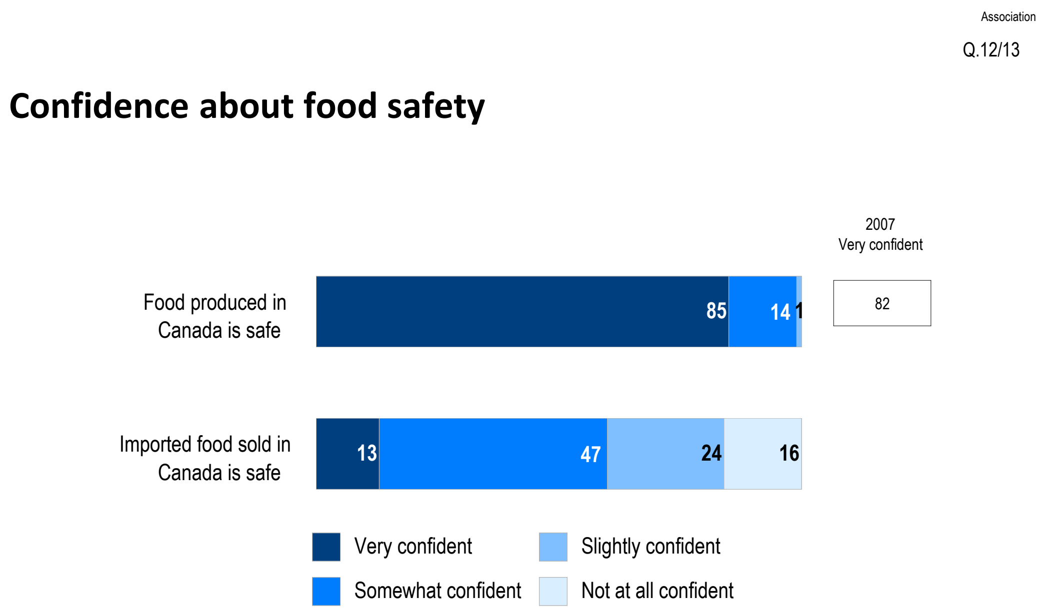
Smaller proportions, more than four in ten, place a high priority on developing new uses for agricultural crops or products (46%), minimizing the negative impact of agricultural activities on the environment (45%), developing plants so that they are more resistant to disease (45%) and helping promote food safety (44%).

Fewer than four in ten assign a high priority to developing plants so that they consume less water (32%).

Food safety

Association executives express much more confidence in the safety of food produced in Canada than they do in the safety of imported food sold in Canada.

A very large proportion of association executives (85%) express great confidence in the safety of food produced in Canada, and an additional number (14%) express some confidence. Only one percent, in total, are not confident.



These figures have not changed significantly since 2007.

In contrast, only a small number (13%) express great confidence in the safety of imported food sold in Canada, and almost half express some confidence (47%). Four in ten are either slightly confident (24%) or not at all confident (16%).

National food policy

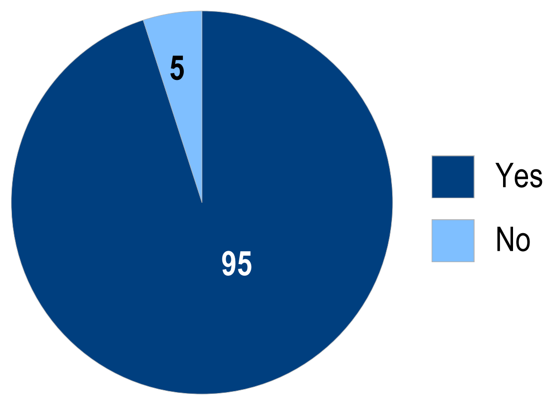
This section examines association executives' attitudes toward Canada adopting a food policy and the preferred priorities for such a policy.

A large majority of association executives express support for a national food policy, and are most likely to think that ensuring the profitability of agriculture and developing a long-term plan for the agricultural sector should be the main priorities for this policy.

When association executives are asked if Canada should have a food policy that sets out a vision for agricultural policy and includes support for agriculture, almost all (95%) express support.

A national food policy – support

Q.18



In a follow-up question, association executives were provided with a list of seven possible objectives for a national food policy and asked what level of priority they felt Canada should place on specific objectives: a high priority, low priority or no priority at all.

Majorities of executives place a high priority on most of the listed objectives, with the highest priorities being to ensure that the Canadian agriculture sector remains profitable and to develop a long-term plan for the agricultural sector. The lowest priority for executives on the list is increasing access to affordable and nutritious food globally.

About nine in ten or more executives place a high priority on ensuring the Canadian agriculture sector remains profitable (93%) and developing a long-term plan for the agricultural sector (89%).

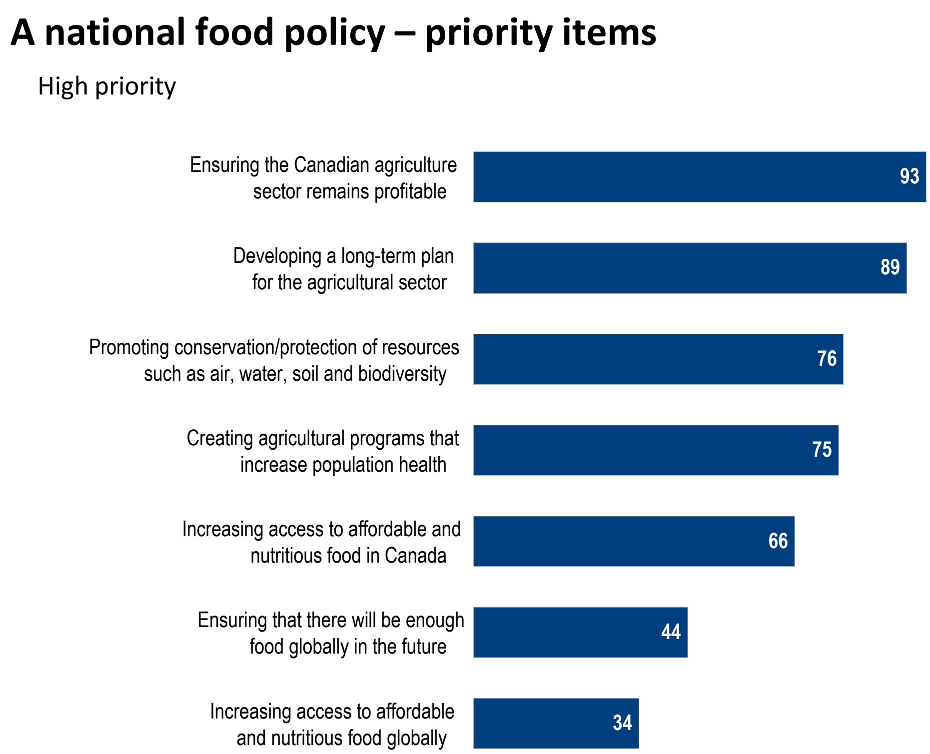
Majorities of two-thirds or more place a high priority on promoting conservation and protection of resources, such as air, water, soil and biodiversity; creating agricultural programs that increase population health; and increasing access to affordable and nutritious food in Canada.

More than four ten place a high priority on ensuring there will be enough food globally in the future.

The lowest priority for a national food policy is increasing access to affordable and nutritious food globally, seen as a high priority by about one-third of executives (34%).

Association

Q.19



Priorities for agriculture

Association executives were provided with a list of agricultural priorities and asked what level of priority they felt governments should place on each: a high priority, low priority or no priority at all.

Investing in scientific research in agriculture, increasing the profitability of the agricultural sector, and helping open up new markets for Canadian food products in Canada and abroad are seen as the highest priorities for governments. Very few place a high priority on expanding imports of food products from other countries.

More than eight in ten place a high priority on investing in scientific research in agriculture (91%), increasing the profitability of the agricultural sector (89%), and helping open up new markets for Canadian food products in Canada and abroad (84%).

Between seven and eight in ten assign a high priority to developing a national agriculture policy for Canada, promoting Canada as a world leader in producing safe, high quality foods; expanding exports of

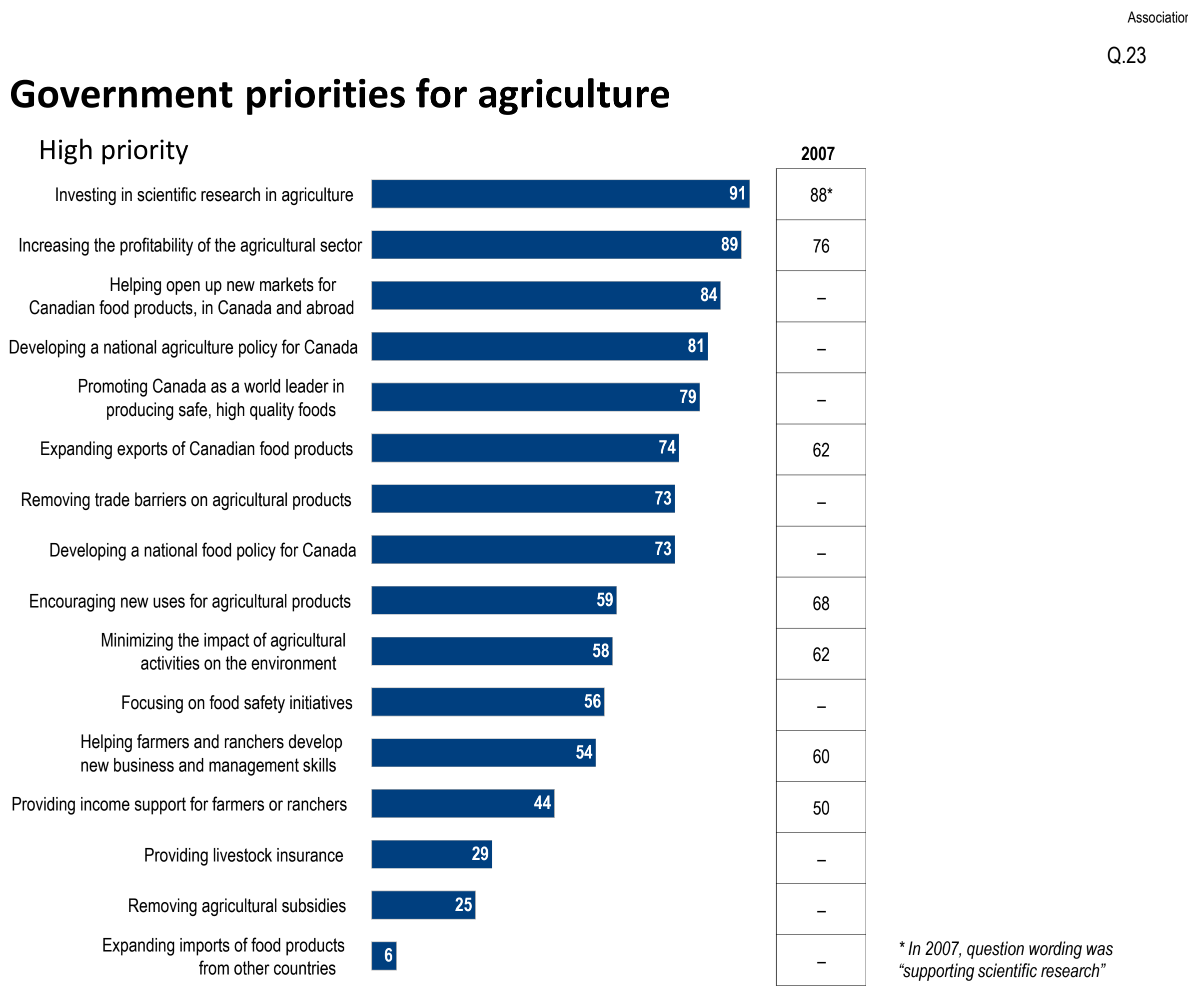
Canadian food products; removing trade barriers on agricultural products; and developing a national food policy for Canada.

Smaller numbers, but still majorities, place a high priority on encouraging new uses for agricultural products, minimizing the impact of agricultural activities on the environment, focusing on food safety initiatives, and helping farmers and ranchers develop new business and management skills.

More than four in ten assign a high priority to providing income support for farmers or ranchers.

One-quarter or more place a high priority on providing livestock insurance and removing agricultural subsidies

At the bottom of the list of priorities is expanding imports of food products from other countries (6%).



Situations faced by the agricultural sector

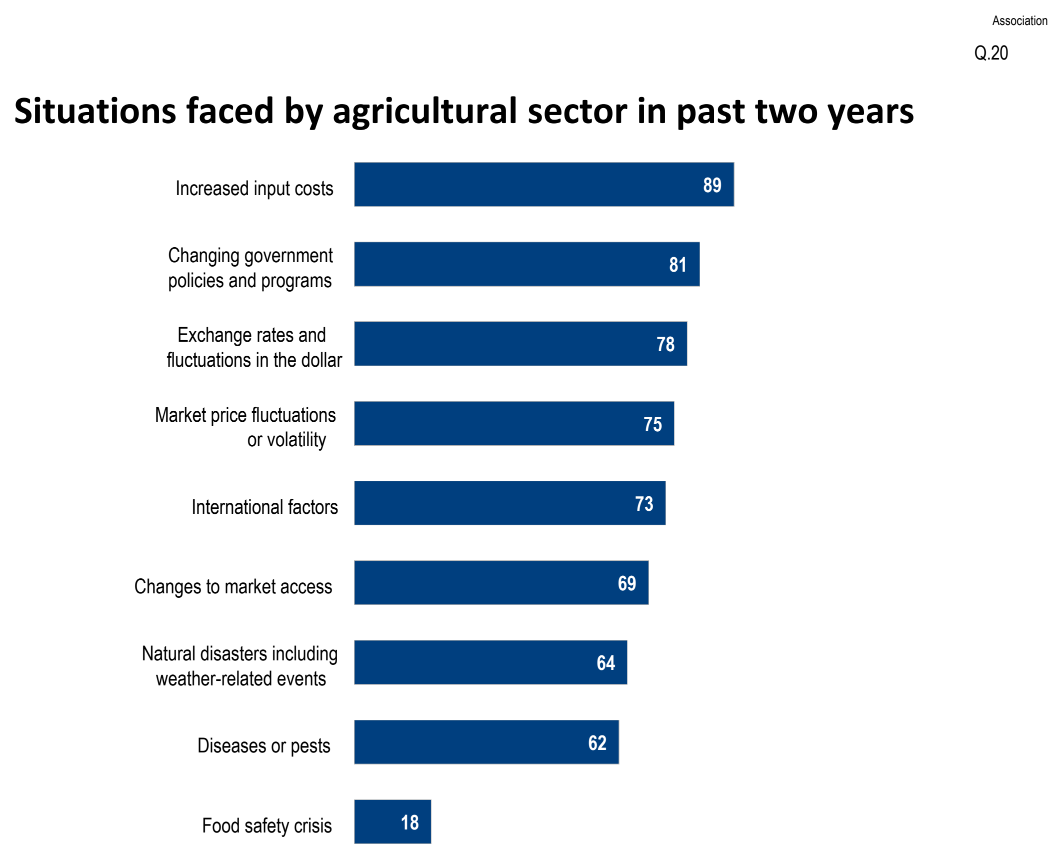
Association executives were presented with a list of situations and asked if their agricultural sector had faced any of these in the past two years. Increased input costs are at the top of the list, while a food safety crisis is at the bottom.

Nine in ten say their agricultural sector has faced increased input costs such as fuel, chemicals, fertilizers and labour costs (89%).

Between seven and eight in ten say their sector has confronted changing government policies and programs, exchange rates and fluctuations in the dollar, market price fluctuations on volatility, international factors such as trade barriers, foreign subsidies or globalization and changes to market access.

Smaller numbers, but still majorities, say their sector has faced natural disasters (including weather related events such as floods or droughts), and diseases or pests (for example, crop blight).

Association executives are least likely to say their sector has faced a food safety crisis (18%).



International marketing of Canadian food products

This section examines association executives' awareness of the "Canada Brand" initiative and whether their association would consider becoming involved in this initiative.

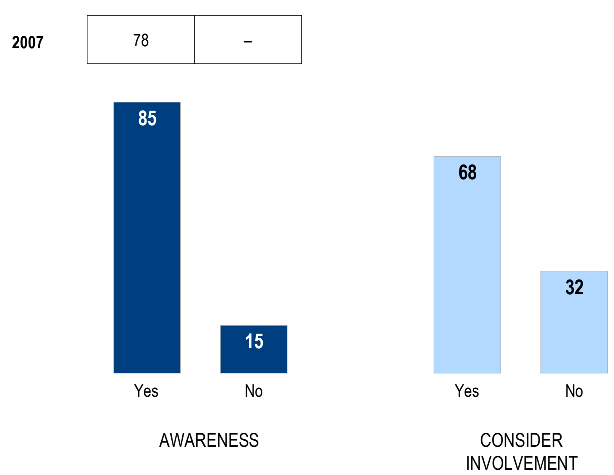
A large majority of association executives say their association is aware of the "Canada Brand" initiative, and a majority say their association would consider becoming involved in this initiative.

When association executives are asked if in the context of the international marketing of Canadian food products, is their association aware of the "Canada Brand" initiative designed to differentiate Canadian products, more than eight in ten (85%) say their association is aware of this initiative.

Association

Q.21/22

Awareness of and involvement in the "Canada Brand" initiative



Awareness of the "Canada Brand" initiative has increased since 2007.

In a follow-up question, association executives were asked if their association would consider becoming involved in this initiative. Seven in ten (68%) say their association would consider involvement in this initiative.

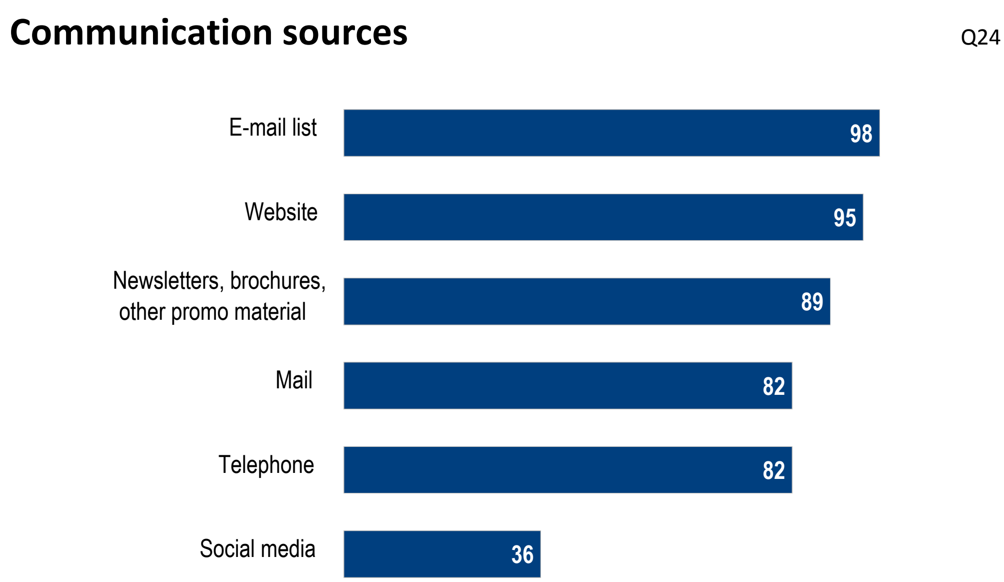
Communications

This section examines communications to association members, including communication sources used to communicate with members, the type of information communicated to members, the subject areas members would want to receive information from the federal government – from Agriculture and Agri-food Canada – and subscription to and consideration of subscribing to any news or information services provided online by AAFC.

Communication sources used to communicate with members. E-mail lists, a website, and newsletters, brochures or other promotional materials are the most likely means of communicating to agriculture association members.

When association executives are presented with a list of communication sources and asked if their association communicates with its members using any of these, the most mentioned sources, cited by nine in ten or more association executives, are an e-mail list (98%), a website (95%), and newsletters, brochures or other promotional material (89%).

Eight in ten say their association communicates with its members via mail (82%) and telephone (82%).



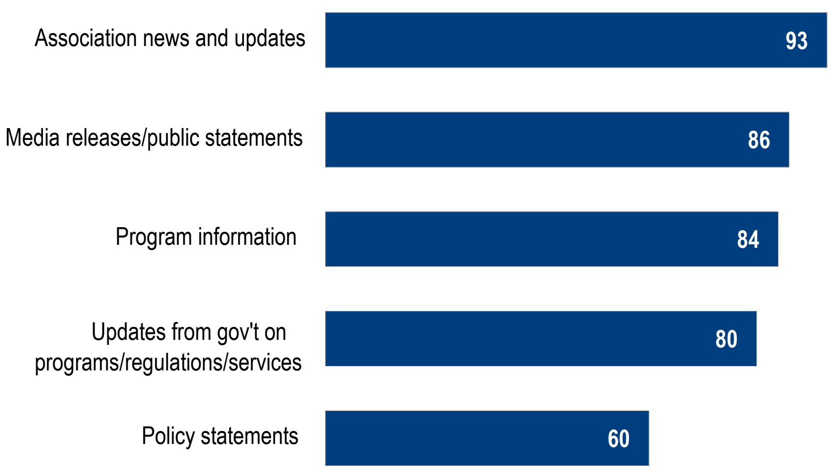
The least likely source of communicating with its members is social media (e.g., Facebook, Twitter, YouTube) (36%).

Types of information communicated to members. Association news and updates, media releases or public statements on a matter of interest, and program information are the most often mentioned type of information communicated to members.

When association executives are presented with a list of types of information and asked if their association communicates any of these types of information to its members, the most mentioned type of information, cited by more than eight in ten association executives, are association news and updates (93%), media releases or public statements on a matter of interest (86%) and program information (84%).

Eight in ten mention updates from government on programs, regulations and services (80%), while six in ten communicate policy statements (60%).

Types of information Q25



Subjects that members would want to receive information from the federal government. Market development and developing a national food policy for Canada are the most likely mentioned subjects that association executives think their members would want to receive from the federal government and Agriculture and Agri-Food Canada.

When association executives are asked to choose from a list of subject areas which ones they think their members would want to receive information from the federal government and Agriculture and Agri-Food Canada, two-thirds choose market development (66%) and developing a national food policy for Canada (66%).

Majorities also think their members would like to receive information on government income support for farmers (AgriStability, production insurance, etc.), Canadian Food Inspection Agency, access to export markets, science research, standards and regulations for food safety, new products or new technologies, support for young and beginning farmers, trade issues, U.S. Farm Bill/WTO Corn challenge, Value Chain Roundtables (e.g., Beef, Grains Innovation, Horticulture, Organics, Pork, Pulses, Seafood, Special Crops), building a Canada Brand for food and agriculture in Canada and internationally, training opportunities for producers and beneficial environmental management practices.

Smaller proportions mention other subject areas.

Subjects of interest

	2007	2011		2007	2011
Market development	–	66	Closed trade borders	22	46
Developing a national food policy for Canada	–	66	Business management advice for producers	10	45
Government income support for farmers	38	61	Disaster relief for farmers	14	42
Canadian Food Inspection Agency	–	59	Farm Credit Canada	–	42
Access to export markets	–	59	Business Advisory Services	–	34
Science research	30	59	Issues facing rural communities	–	34
Standards and regulations for food safety	34	58	Genetically modified organisms (GMOs)	–	33
New products or new technologies	32	55	Commodity prices	18	31
Support for young and beginning farmers	–	55	Fuel and fertilizer prices	–	31
Trade issues/US Farm Bill/WTO Corn challenge	28	54	Organic food production	–	28
Value Chain Roundtables	–	52	Farm diversification	–	24
Building a Canada Brand for food and agriculture	–	52	Farm Products Council of Canada	–	19
Training opportunities for producers	–	51	Poultry and Dairy Marketing Boards	–	16
Beneficial environmental management practices	28	51	Canadian Grain Commission	–	15
Food labelling	–	49	Canadian Wheat Board	–	14
Diseases or pests	–	49	Canadian Dairy Commission	–	14
Education around food safety	12	48	Canada Agricultural Review Tribunal	–	8
Environmental regulations and standards	36	48	Others	–	1
Recent research on crops, food production, etc.	–	46	None of the above	–	1

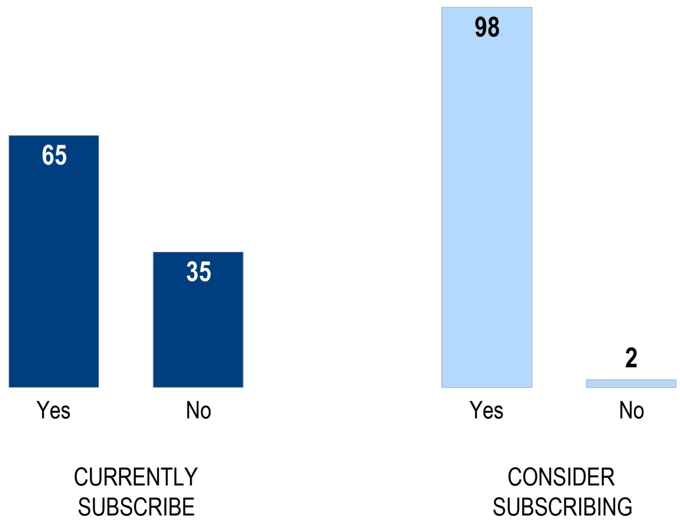
Subscription to/consider subscribing to AAFC online news/information services. A majority of association executives say their association subscribes to online news or information services provided by AAFC, and an almost unanimous number say they would consider subscribing to these services.

Two-thirds of association executives (65%) say their association subscribes to news or information services provided online by AAFC.

In a follow-up question, 98 percent say they would consider subscribing to these online services provided by AAFC.

AAFC online services

Q.29/30



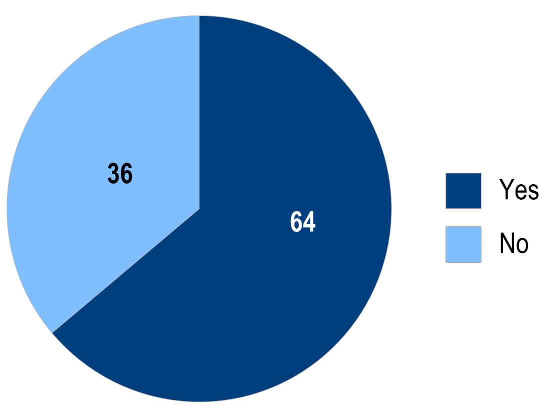
Awareness of intergovernmental engagement sessions on agricultural sector

A majority of association executives say their association is aware of intergovernmental engagement sessions on challenges and opportunities facing the agricultural sector.

About two-thirds of association executives (64%) say their association is aware of federal, provincial and territorial government engagement sessions held in early 2010 on challenges and opportunities facing the agricultural sector, while about one-third are not.

Awareness of intergovernmental sessions

Q.27



Interest in participating in advisory panel of associations

There is almost unanimous agreement among association executives that their association would be interested in participating on an advisory panel of associations to consult on a wide range of issues.

Association executives were asked whether their organization would be interested in participating if Agriculture and Agri-Food Canada were to develop an advisory panel of associations to consult on a wide range of issues. A unanimous proportion (98%) say their association would be interested in participating in this advisory panel.