

Introduction



Thank you for participating in this survey. It is important to us to hear from all kinds of people involved in Canadian agriculture and the agri-food sector.

The survey should take about 10 to 12 minutes of your time.

QCatchy1.

Base=All

Single choice

Thinking of the second term of U.S. President Donald Trump and the impact his policies may have on agriculture and agrifood in Canada, are you generally hopeful or pessimistic for the next four years?

Very hopeful

Hopeful

Pessimistic

Very pessimistic

Stakeholder Profiling

QS1.

Base = All

Single choice

And how are you/your organization involved in the agri-food system? Which best describes your position:

Industry (i.e. producer, processor, distributor etc.)

Government

Civil Society (i.e. academia, an NGO, the media etc.)

Other

Don't consider myself involved in the agri-food system

QS1.5

Base=Don't consider in QS1.

Single choice

[Thank and terminate]

Thanks for your time but it appears this is not the right survey for you.

QS2.

Base = Industry in QS1

Single choice

What best describes the part of the agri-food industry you/your organization are involved in?

Farming

Inputs

Processing, handling, distribution

Retail

Financial, Marketing, other advisory/support services

Industry association

Other, specify: _____

Not involved in agri-food – **Thank and Terminate**

NEW SECTION

QN1.

Base=All

Single choice

Based on whatever you know about Canadian agriculture and agri-food and/or your experiences, how do you feel about the level of trade Canada does with the United States in this industry.

Too high of a concentration, we should diversify

About the right amount

Not a high enough concentration, we should increase

Not sure/can't say

QN2.

Base=All

Single choice

Regardless of whether you feel the agriculture and agrifood industry **should** concentrate less in the United States, how confident are you that the industry **could** concentrate less in the United States, and make up that loss elsewhere?

Very confident

Confident

Not that confident

No confidence at all

Not sure/Can't say

QN3.

Base=All

Single choice

Where do you think Canada should focus its agrifood efforts in the coming years? Expanding trade outward, or building up the domestic market?

Build the domestic market

Build stronger international trade relationships

QP4.75

Base=All

Single choice grid

How much of a growth opportunity do these markets/regions represent for Canadian agriculture and agri-food over the next 10 years?

Canada (domestic market)

Europe

China

India

Rest of Asia

US

Mexico

South America

A massive opportunity

An opportunity

A small opportunity

No real opportunity here

QN4.

Base=All

Single choice

As you have likely heard, President Donald Trump has implemented significant tariffs on Canada's exports to the U.S. How confident are you that Canada can mitigate the impacts of potential disruptions in agriculture and agrifood with the U.S.?

Very confident

Confident

Not that confident

No confidence at all

Not sure/Can't say

QN5.

Base=All

Single choice

Assuming there are tariffs imposed on exports and imports for goods in Canada, including in agriculture and agrifood. How long do you think you and/or your company/organization will be able to maintain operations in this environment?

I'm insulated from it/I'll be fine

Only a few months

Six months or so

A year or so
A couple of years
The full four years until a new administration takes over

Back to Industry

Now, let's get some more information about your role in agriculture/agrifood.

QS3a.

Base = Farming in QS2

Single choice

What is your main product? (Please select the one product category that represents the largest source of revenue for your operation.)

Cattle
Hogs
Other Livestock
Poultry
Dairy
Eggs
Grains, oilseeds, pulses
Fruit and Vegetable
Other, specify: _____

QS5a.

Base = Government in QS1

Single choice

Which level of government are you with?

Federal
Provincial/Territorial
Municipal/Regional
Indigenous

QS5b.

Base = Government in QS1

Single choice

And are you a:

Public servant
Elected Official
Other, specify _____

QS6.

Base = Civil society in QS1

Single choice

More specifically, are you working with/as part of: ?

- Academia
- NGO
- Think tank
- Consultancy
- Media
- Industry association
- Conservation
- Other, specify _____

QS7a.

Base = Civil society in QS1 and Other industry in QS2 – Exclude Farming.

Single choice

And to confirm, are you employed with an *association* that represents the interests of member agri-food organizations, or are you with an entity that is itself directly involved within the agri-food system?

- Yes, an association
- No, with an entity directly involved

QS8a.

Base = Farming in QS2

Single choice

Which segment of the value chain are you or your organization most associated or involved with?
(Please select a *primary* product if appropriate or select “integrated” or specify other.)

- Meat
- Dairy
- Poultry
- Eggs
- Grains, oilseeds and pulses
- Fruit & Vegetables
- Other, specify _____

QS8b.

Base = Industry in QS1 but Exclude Farming in QS2

Single choice

Which segment of the value chain are you or your organization most associated or involved with?
(Please select a *primary* product if appropriate or select “integrated” or specify other.)

- Processing
- Research & Development
- Input supplier

Bioproducts (biofuels, etc.)
Financial Services
Other services
Retail
Grain Handling
Marketing
Integrated business
Other, specify _____

QS9b.

Base = All

Single choice

And how long have you been working in agri-food?

Less than 10 years
10 to 20 years
20 to 30 years
More than 30 years

Landscape/Context

[Display screen]

Now we want to get people's perceptions of Canadian agri-food, including some of the risks and opportunities facing this sector.

QL1.

Base = All

Single choice

Overall, would you say you are optimistic or pessimistic about the future of Canadian agriculture and the agri-food system?

Very optimistic
Optimistic
Neither
Pessimistic
Very pessimistic

QL2.

Base = All

Single choice grid

From your own perspective, how does Canada's agri-food system performance compare to other countries in each of the following areas?

[Items – present in random order]

Economically (e.g. competitiveness, profitability)

Environmentally (e.g. GHG emissions, biodiversity)
Socially (e.g. food affordability, trust in the food system, healthy rural communities)
[Anchor – fixed] Overall

[Responses]
Well ahead of other countries
Slightly ahead
The same
Slightly behind
Way behind other countries
Not sure/Can't say

QL3.
Base = All
Single choice

Rising incomes and population growth around the world signal a future with increased demand for high quality food products. Would you say Canada is well or poorly positioned to take advantage of these new opportunities in the global marketplace?

Very well positioned
Well
Fair
Poorly
Very poorly positioned
Not sure/Can't say

Risk Assessment

QR1.
Base = All
Open-ended

Let's focus now on the potential risks or threats facing Canadian agriculture and the agri-food system. These could be threats right on the doorstep or on the horizon. They could be specific to your own area or impacting the agri-food system as a whole.

Top-of-mind, which risks are you yourself most concerned about? (Just use some key words to highlight.)

[Display screen]

Let's look at some specific potential risks now.
We've grouped several into these five overall categories: [Present below in randomized order]

Environmental

Economic/Financial
Domestic
Production
International

QR2.

Base = All

Multi-choice max 3 per block

Going through this full list of potential risks, please select which ones you consider to be the most significant threats to the Canadian agriculture and food system *within the next 10 years*. For each category, please select **up to three issues** that you are most concerned about or choose “none of these” are significant if that’s your view.

[Present risk blocks A through E in same random order as above display screen, showing category labels. Randomize items within each category and then keep that order throughout. Anchor each list with “None of these” as an exclusive option.]

Bloc A. Potential Environmental Risks

Extreme weather (drought, floods, wildfires)
Climate change
Animal disease
Biodiversity
Water
Soil
[Exclusive]None of these

Bloc B. Potential Economic/Financial Risks

Inflation
Commodity price volatility
Interest rates
Access to financial capital
Farm income and debt
Recession
[Exclusive]None of these

Bloc C. Potential Domestic Risks

Domestic food security
Public trust in agri-food
New competition
Polarization, including rural/urban divide
Political change
Consolidation and concentration
Policy and regulatory environment

Farm transition/succession
[Exclusive]None of these

Bloc D. Potential Production Risks

Infrastructure/Supply chains
Access to new technologies and innovations
Input affordability
Human resources
Rural broadband access
Loss of farmland
[Exclusive]None of these

Bloc E. Potential International Risks

Market concentration
Political dynamic in the United States
Reduced market access to Indo-Pacific markets
More restrictive regulations in Europe
Lack of progress on international trade rules (i.e. WTO)
Trade barriers and protectionism
International conflict
Global food security
Cybersecurity
[Exclusive]None of these

If respondent selects eight or fewer total issues in QR2 – skip to QR4.

If respondent selects nine or more issue in QR2 – move to QR3.

QR3.

Base=All choosing 9+ issues at QR2

Multichoice – select up to 8

From the different risks you selected as significant threats to Canadian agri-food this decade, please now choose the eight that you consider to be the most important risks. We have a few questions for you about those top risks.

Show those selected in QR2, same order

QR4.

Base = All

Single choice grid

Show the eight issues in QR3, or the eight or fewer selected in QR2, same order

For each of those issues you chose as a threat to Canadian agri-food in the coming decade, which time horizon do you think it will be an issue in?

Already a problem
Short-term – next few years
Medium-term
Long-term – More than 10 years away

QR4.5

Base=All

Single choice grid

Show the eight issues in QR3, or the eight or fewer selected in QR2

And for those same issues, do you believe they will be acute (intense but brief) or chronic (persistent over a long period)?

Acute
Chronic

QR5.

Base = All

Single choice grid

How would you describe the level or severity of challenge each of these same risks poses for Canada's agri-food system?

Show the eight issues in QR3, or the eight or fewer selected in QR2

Manageable
Difficult
Extreme

QR6.

Base=Chose policy and regulatory environment in QR2

Select up to two

You mentioned you're concerned about the policy and regulatory environment in Canada. What factors are driving this concern? Please select from the list below or add your own reason in the text box.

Lack of political support
Unnecessary regulatory burden
Lack of financial support for the sector
Government priorities that are not aligned with the sector's
Lack of understanding or awareness of agriculture and food issues
Government departments struggle to deliver results
Other, specify _____

Policy/Mitigation

[Display screen]

We want to consider those same risks you'd highlighted as most significant for Canadian agriculture and the agri-food system generally and get some perspectives on government and private sector efforts to address these risks.

QP1.

Base = All

Multi-choice

How *confident* are you that the current policy framework in Canada will effectively reduce or mitigate each of these challenges?

Show the eight issues in QR3, or the eight or fewer selected in QR2

Very confident

Confident

Not that confident

Not confident at all – expect they will fall short

Unsure

QP2.

Base = All

Multi-choice

Show the eight issues in QR3, or the eight or fewer selected in QR2

And how *confident* are you that the private sector (ie the non-government players) will effectively reduce or mitigate each of these challenges?

Very confident

Confident

Not that confident

Not confident at all – expect they will fall short

Unsure

QP3.

Base = All

Multi-choice (5 max)

Different policies and approaches can be used to address the various potential risks facing Canadian agriculture and agri-food.

From the list below, which of the following would you highlight as top priorities for **governments** to address? (Please select up to five.)

[Randomize the mitigation actions.]

Immigration

Skills development
Labour supply
BRM (Business Risk Management) programs
R&D and innovation
Business investment
Domestic regulations
GHG mitigation and sequestration
Climate change adaption
Natural resources (soil, water, biodiversity)
Domestic value-added
Interprovincial trade
Automation
Access to credit/availability of credit
Competitiveness
Productivity growth
Foreign direct investment
Infrastructure
Governance/Federal-Provincial-Territorial relations
Income inequality
Taxes
Public trust
Trade Policy/Advocacy
Farm succession
Mental health
[Exclusive] Not concerned about any of these

QP4.

Base = All

Multi-choice

And what about the private sector, looking at the same list, what would you say are the top priorities for **non-government** players to address? (Please select up to five.)

[Same list as QP3, same order.]

QP6.

Base=All

Rank top two

If the policy agenda were to be reset, which of the following ideas serve as the best strategic direction for the next decade of agriculture and food policy in Canada?

Over the next 10 years, Canadian agriculture policy should focus on:

[Randomize]

Increasing productivity growth through research and innovation
Encouraging the adoption of more sustainable, resilient farming practices
Supporting more local and regional food systems
Improving trade infrastructure and supply chain reliability
Meeting the human resource and labour needs of the sector
Mitigating climate change and protecting the environment
Making farmers and food processors more profitable
Growing domestic food processing and value-add
Tearing down internal trade barriers
Diversifying into new international markets
Developing, commercializing, and adopting new ag tech

QP7.

Base = All

Open-end

Do you have any closing advice as to what kind of effort or support the Canadian agriculture and agri-food sector needs to unlock its full potential considering the various risks we've been looking at?

Demos/Additional Profiling

QD1.

Base = All

Single choice

What year were you born?

[Dropdown of year]

Prefer not to say

QD2.

Base = All

Single choice

What is your gender?

Male

Female

Other

Prefer not to say

QD3.

Base = All
Single choice

Which province/territory is your business/operation located in?

Alberta
British Columbia
Manitoba
New Brunswick
Newfoundland & Labrador
Nova Scotia
Northwest Territories
Nunavut
Ontario
Prince Edward Island
Quebec
Saskatchewan
Yukon Territory

QD4.
Base = All
Single choice

And what best describes the area where you work/operate from?

Large urban population centre, that is, it has a population 100,000 or greater
Medium urban population centre, that is, it has a population of 30,000 to 99,999
Small urban population centre, that is, it has a population of 1,000 to 29,999
Rural area, that is, it has a population of less than 1,000
Remote area, that is, it has a population of less than 1,000 and separate from other communities
Don't know/Prefer not to say

QD5.
Base = All
Open-end

What are the first three digits of the postal code there (or the post office where its mail is received)?
(Just so we can better classify our survey respondents into overall regions.)

___ _ _

QD6.
Base = All
Single choice

Finally, what is the highest level of formal education you have completed?

Some elementary or high school

High school graduate

Some college/trade school

Graduated from college/trade school

Some university

University undergraduate degree, such as a bachelor's degree

University graduate degree, such as a master's or PhD

The end

That's the end of the survey. Thank you very much for participating and sharing your views. This will assist overall efforts to advance the agri-food sector's interests and challenges.

Please click submit to ensure your complete survey is delivered.