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Strategic Objectives

- Measure awareness, attitudes, direction and intensity of public opinion about agricultural issues and policies.
- Measure the geographic and demographic distribution of public support/opposition for agricultural issues and policies.
- Identify how agriculture and agri-food is seen in relation to other major sectors of the Canadian economy with respect to employment potential and environmental impact.
- Probe and measure key benefits of a more robust agriculture and agri-food sector: Economic Growth, Food Security, and Environmental Stewardship.
- Explore obstacles and opportunities facing Canada’s agriculture and agri-food sector as a whole.
Executive Findings

- Canadians have a great deal of trust in the food grown or produced by Canada’s agri-food sector.
- Agriculture is seen as more environmentally friendly than other major industry-related sectors of the Canadian economy.
- Canadians strongly support the government committing financial subsidies for the agriculture and agri-food sector.
- Canadians overwhelmingly consider quality over price when shopping for food.
- Canadians are most confident in the safety and quality of food grown or produced in Canada, followed by the European Union and then the United States.
Other Key Findings

• One-in-three Canadians would recommend the agriculture and agri-food sector to someone seeking employment.

• Of the four food additives tested in this survey, hormones had the highest degree of negativity followed by pesticides, antibiotics and GMOs.

• In the fight against food waste, Canadians see individual consumers as having the greatest amount of responsibility in reducing food waste followed by retail and grocery outlets.

• Canadians are more supportive of government prioritization of financial support for fish, seafood and aquaculture over other protein sources such as beef, pork or poultry.
From what you know or have heard, please rank the following industries from 1 to 5 with respect to their potential to create long-term, well paying jobs for Canadians.

(1 meaning very little potential, 5 meaning very high potential.)

47% of Canadians see the potential for sustainable agricultural employment. However, if the sector truly wants to be seen as capable of creating the jobs of tomorrow, it needs to promote and highlight its relationship with tech and innovation. Agriculture needs to be seen as a technologically advanced sector.

QUESTION:
Agriculture is second only to renewable energy when it comes to Canadians’ support for government subsidies.

Akin to employment, agriculture can help build support for government subsidies by showcasing its successes in applying renewable energy on the farm. As support for government action on climate change picks up, people will see that “to grow is to be green”.

**QUESTION:**

From time to time governments commit financial subsidies for certain industries to maintain or stimulate economic growth. Please indicate how supportive you are of government subsidies for the following sectors:
Compared with other leading sectors, agriculture enjoys strong public support at a time when environmental concerns are top-of-mind.

For the sector to maintain this image long-term, it is important to distance farming operations from resource extraction and manufacturing.

QUESTION:
Please rank the following economic sectors in Canada from -5 to +5 with respect to their impact on the country’s environment. (-5 meaning very negative impact while +5 meaning very positive impact.)
Canadians are split about recommending a career in agriculture. These findings may be due to a lack of awareness of the types of jobs that currently exist in agriculture and agri-food, or antiquated views about the field’s employment opportunities more generally. The sector could showcase it is “Now Hiring”.

**QUESTION:**
If someone seeking employment came to you asking for your advice about possible career opportunities to pursue, how likely are you to recommend a career in agriculture and/or agri-food (farming and/or food processing industries)?

- 10% Very Unlikely
- 18%
- 27%
- 20%
- 12%
- 14%

- 1 (Very Unlikely)
- 2
- 3
- 4
- 5 (Very Likely)
- Don’t Know
Canadians lack awareness about the employment potential of the agriculture sector. As automation and innovation grows within the agriculture and agri-food sector there is opportunity to promote skilled and well-paying jobs.

**QUESTION:**

Some experts believe that increased technological innovation in agriculture and agri-food will result in job-losses for the sector as a result of automation.

Other experts believe that increased technological innovation in agriculture and agri-food will result in greater employment for the sector as demand for technical skills and expertise increases.

Do you believe increased technological innovation in agriculture and agri-food will result in the sector...?
When thinking about the future of Canadian agriculture and agri-food, do you believe that the sector is likely to grow, shrink or stay the same compared to what it is today?

Almost twice as many Canadians believe the agri-food sector will grow as opposed to shrink. Agricultural advocates can promote technological innovations and diverse employment opportunities.
When considering agricultural practices, standards and regulations among the following countries, please indicate what you believe their impact is to their domestic environment from -5 to +5. (-5 meaning very negative environmental impact while +5 meaning very positive environmental impact.)

Canada’s agricultural impact to environment is viewed more positively than other countries. The further away Canadians look, the less they know about other countries’ domestic environmental impact. Agricultural advocates may build on this by comparing Canadian agricultural standards and practices to those around the world, to build trust and support.
Some experts believe that the agriculture and agri-food sector poses a threat to the environment by producing high levels of carbon dioxide emissions and soil contamination.

Other experts believe that agriculture and agri-food can benefit the environment through sustainable land conservation and growing crops that absorb carbon dioxide.

Which of these options comes closest to your personal view:
When considering agricultural practices and methods in Canada today compared to what they were thirty years ago, do you believe the sector’s impact on the environment has become…?

Canadians are unsure of the agri-food sector’s impact on the environment compared to thirty years ago. There is room for the sector to educate Canadians about significant strides in environmental efficiencies, and that no one has greater interest in a clean and green environment than farmers.

**QUESTION:**
When considering agricultural practices and methods in Canada today compared to what they were thirty years ago, do you believe the sector’s impact on the environment has become…?
Canadians are overwhelmingly confident in the safety of domestically produced food. They are more skeptical of food grown or produced in the U.S. despite being large consumers of American products. Canadians are twice as confident in the safety of food grown and produced in the EU over the United States.

**QUESTION:**
How confident are you in the safety of food grown or produced in each of the countries listed?

- **Canada:** Net favourability: 85%
- **United States:** Net favourability: 64%
- **China:** Net favourability: 12%
- **Mexico:** Net favourability: 38%
- **European Union:** Net favourability: 72%
Most Canadian consumers value quality over price when shopping for food. Canadians have a great deal of trust in Canadian grown products. To maintain this positive image, it is important that producers emphasize the quality and safety of food grown in Canada to the end consumer. People are willing to pay a bit more for high quality foods.

**Mean:** 6.72  
**Median:** 7  
**Mode:** 7

**Question:** Using a scale of 0 to 10, please indicate how you balance food quality and food price when shopping for food. (0 represents full priority on price while 10 represents full priority on quality.)

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**Diagram:**

- **Price:**
  - 0 (Price): 1%
  - 1: 0.5%
  - 2: 1%
  - 3: 3%
  - 4: 4%
  - 5: 18%
  - 6: 14%
  - 7: 25%
  - 8: 16%
  - 9: 6%
  - 10 (Quality): 9%
  - Don’t Know: 3%

- **Quality:**
  - 0 (Price): 1%
  - 1: 0.5%
  - 2: 1%
  - 3: 3%
  - 4: 4%
  - 5: 18%
  - 6: 14%
  - 7: 25%
  - 8: 16%
  - 9: 6%
  - 10 (Quality): 9%
  - Don’t Know: 3%
Canadians see farmers as less responsible for food waste when compared with other groups. The agricultural sector can build on this by showcasing what it has already done to minimize food waste and how it continues to lead the way. Agriculture advocates can partner with government (also seen as being responsible) to make this happen.

QUESTION:

Food waste has increasingly been seen as a growing problem with up to 50% of all food items in developed countries like Canada ending up as waste.

Among the groups listed below, identify the level of responsibility each group has in reducing food waste on a scale from 1 to 5. (1 meaning almost no responsibility at all while 5 meaning complete responsibility.)

<table>
<thead>
<tr>
<th>Group</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants &amp; Food Services</td>
<td>3%</td>
<td>5%</td>
<td>15%</td>
<td>36%</td>
<td>36%</td>
<td>4%</td>
</tr>
<tr>
<td>Government Regulation &amp; Policy</td>
<td>4%</td>
<td>10%</td>
<td>22%</td>
<td>27%</td>
<td>30%</td>
<td>7%</td>
</tr>
<tr>
<td>Individual Consumers</td>
<td>1%</td>
<td>5%</td>
<td>13%</td>
<td>30%</td>
<td>47%</td>
<td>4%</td>
</tr>
<tr>
<td>Retail &amp; Grocery Outlets</td>
<td>2%</td>
<td>6%</td>
<td>15%</td>
<td>39%</td>
<td>34%</td>
<td>5%</td>
</tr>
<tr>
<td>Farmers &amp; Food Processors</td>
<td>5%</td>
<td>14%</td>
<td>23%</td>
<td>30%</td>
<td>22%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Canadians view all additives to modern agriculture overwhelmingly negatively. People support farmers but are wary of agri-business. The more wholesome and natural the product, the better. Respondents had overwhelmingly negative perceptions of additives farmers and food processors use. Industry stakeholders may say these additives are necessary; however, it would be wise for stakeholders to stress they use as few additives as possible, or find innovative ways to use none.

**QUESTION:**
Please tell us if you have a positive or negative perception of the following additives that farmers use when producing or growing food items.
Governments at times agree to subsidize or provide special support to industries in order to protect them from foreign imports, help export more goods to foreign markets and to help grow and protect jobs.

On a scale from 1 to 5, please indicate how much prioritization the Canadian government should place on supporting the following agri-food related industries through subsidies or special support. (1 meaning very little priority while 5 meaning very high priority.)

**Fish/seafood/aquaculture**
- 6%
- 6%
- 21%
- 30%
- 30%
- 8%

**Grains**
- 5%
- 4%
- 19%
- 31%
- 34%
- 7%

**Pork**
- 9%
- 11%
- 24%
- 25%
- 23%
- 7%

**Beef**
- 8%
- 11%
- 23%
- 25%
- 27%
- 7%

**Fruit & Vegetables**
- 3%
- 4%
- 18%
- 27%
- 42%
- 7%

**Poultry (chicken, turkey etc)**
- 7%
- 8%
- 24%
- 28%
- 27%
- 7%

**Dairy**
- 7%
- 6%
- 20%
- 26%
- 34%
- 7%

**QUESTION:**

Canadians overwhelmingly support government subsidies to agricultural producers. While roughly half of respondents do believe that government should prioritize proteins like beef and pork, livestock commodities lack the intensity of support held by fruit, vegetables and grains. Protein commodities may want to investigate whether this is the result of possible environmental perceptions or changing consumer preferences. There appears to be a correlation between the updated Canada Food Guide and public opinion, although Canadians are more supportive of dairy than the guidelines set by Health Canada.
Methodology

- Online survey from representative panel
- N=1,002
- Canada-wide
- Survey offered in English and French
- Canadians 18+
- Interlocking quotas as set out in 2016 Canadian Census (Age, gender, province)
- Fieldwork: April 29-May 2, 2019
- Error: N/A for Online Polls (Comparable Margin of Error would be +/- 3%, 19 times out of 20)
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