



**Ipsos**  **Reid**

## Young Farmer Needs Qualitative Research Project

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Ipsos Reid



## Who are we?

### *Ipsos Reid – AgriBusiness, Food and Animal Health Division*

- Established in 1985
- Based in Milton, ON (But not for long!!!) and in Winnipeg, MB
- North American focus with **global capabilities**
- Nine market research professionals
- Ag/Animal Health Industry leader in Canada
- We have extensive experience conducting research with a broad range of audiences:



***We're passionate about***  
**AGRICULTURE**



## Young Farmer Needs Research

Ipsos Reid was approached by a coalition of producer associations with an important research task

- As you may know, the agricultural industry in Ontario is faced with a crisis:
  - Declining influx of young farmers into the industry
  - The average age of a farmer in Ontario is 50, with anyone under 40 years of age representing a young farmer.
  - Ensuring sustainability in Ontario requires investment into programs that will encourage young people to choose agriculture as a career.
  - This information will help to develop a long-term strategy that will encourage young people to start or continue farming and to equip them with the right skills to maintain and increase Ontario's economic competitiveness in the Agri-food sector.



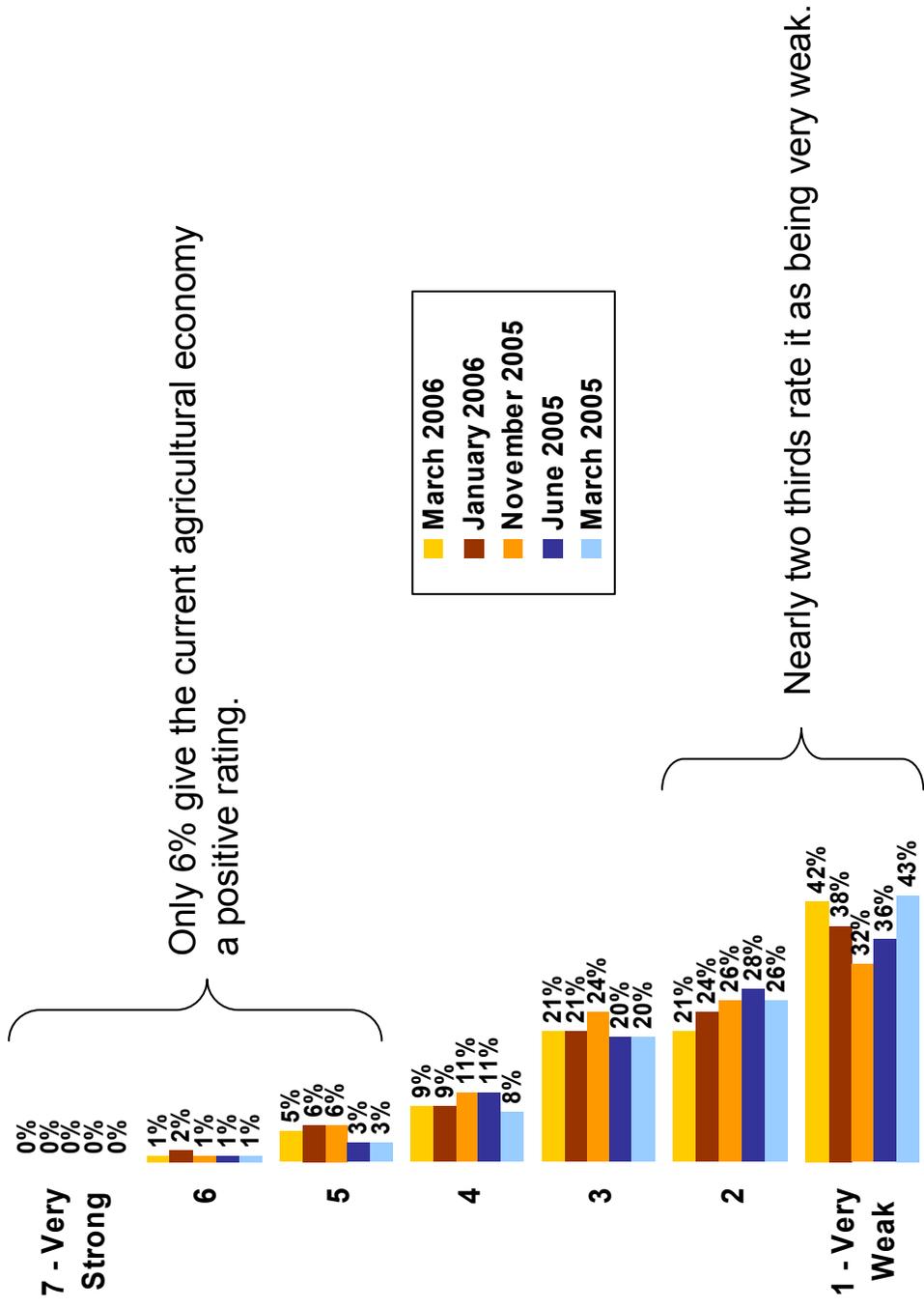
## The Current Landscape

*Before we discuss the project further, let's see what farmers are saying about agriculture in Canada...*

*...there are some obvious barriers to entry.*



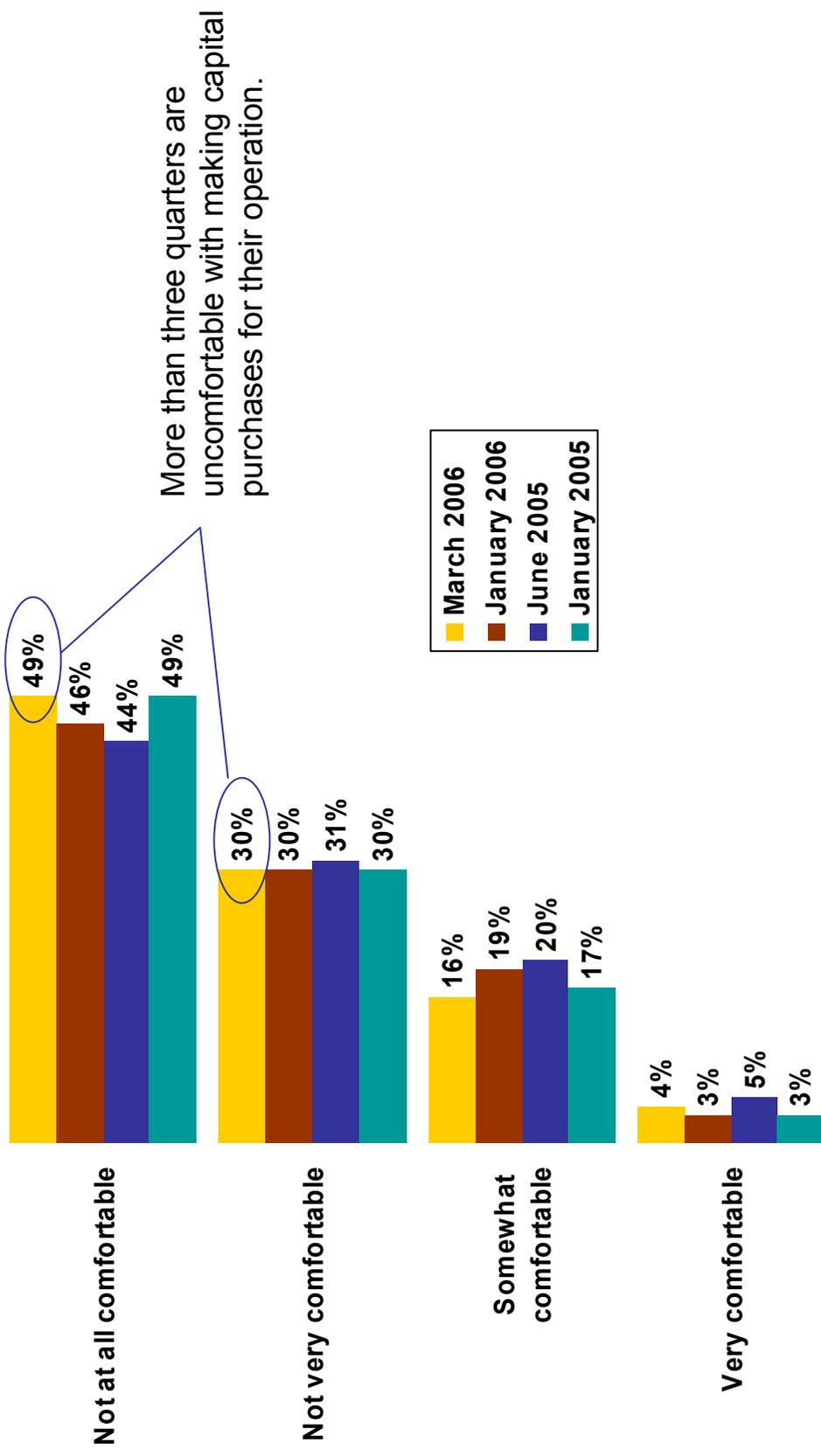
# Current Status of the Agricultural Economy





# Current Comfort Levels with Capital Purchases

Q7a. Thinking about your farm's situation right now, how comfortable are you with making a capital purchase for your farm such as for land, equipment or buildings?

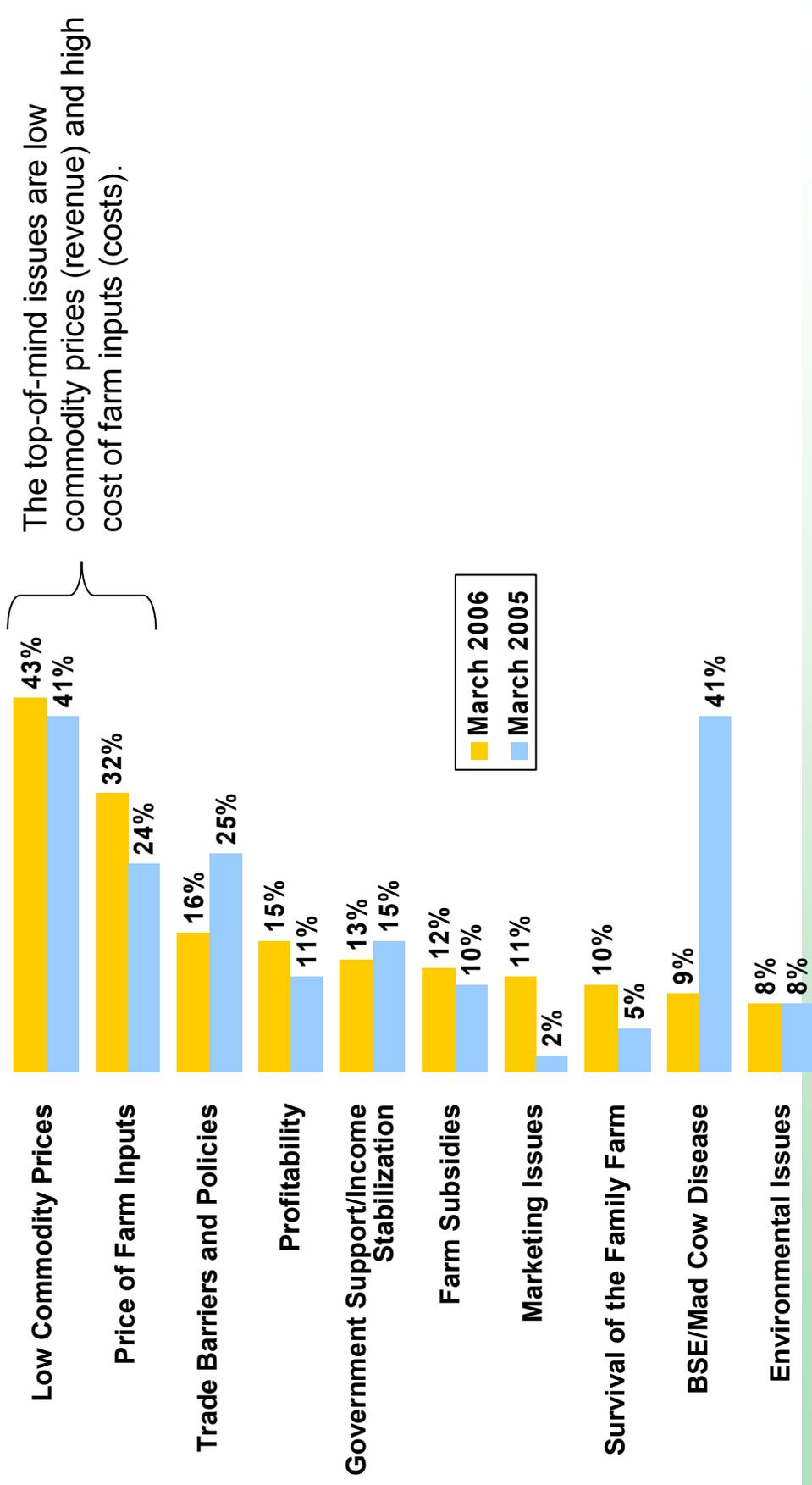


Base: All Respondents (n=875)



# Top of Mind Issues for Agriculture in Canada (Top Ten)

Q1a. Thinking of the issues presently facing the agriculture industry in Canada, which one issue do you feel should receive the greatest attention from Canada's leaders? [Total Mentions]



Base: All Respondents (n=875)



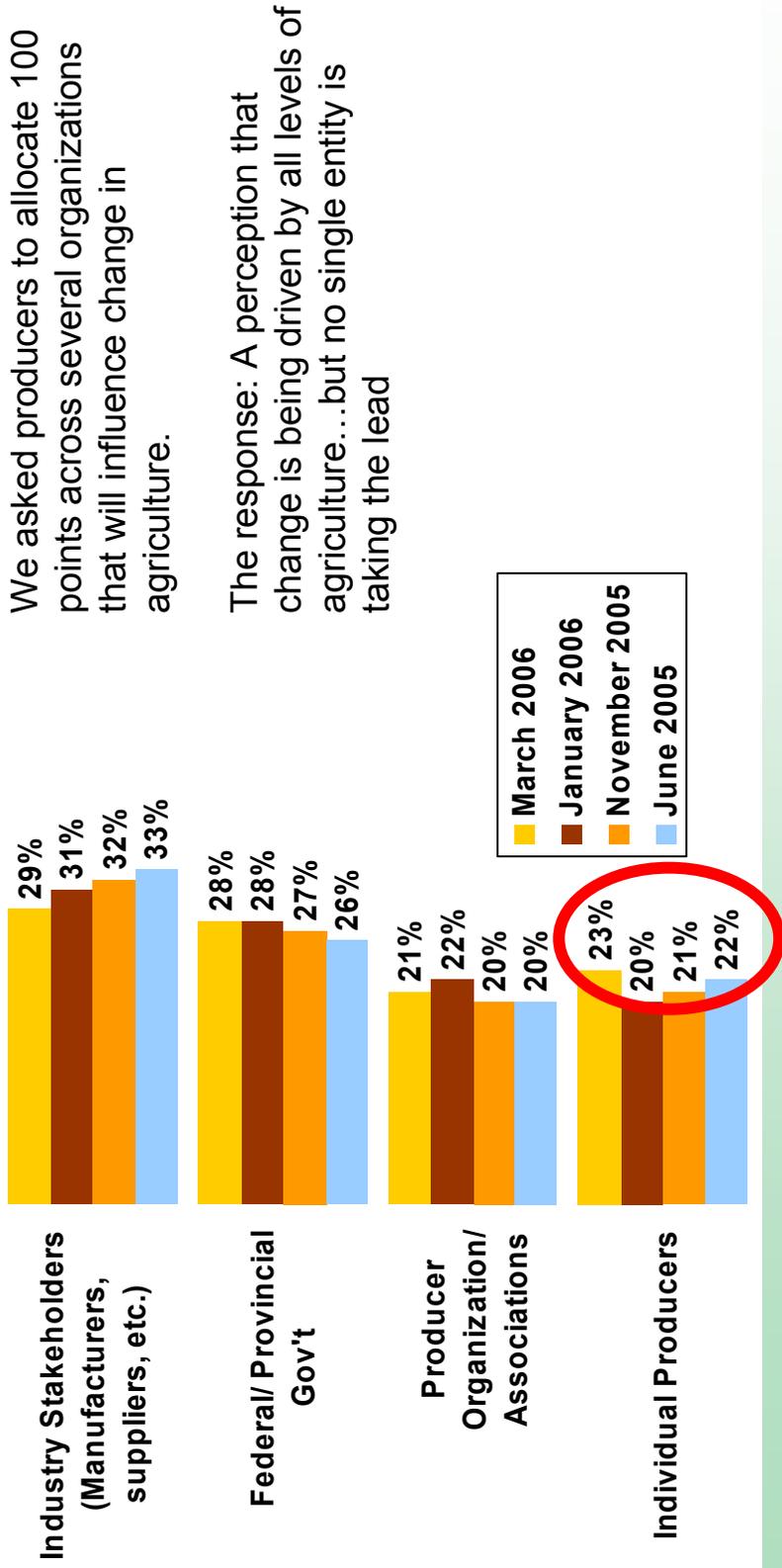
# ***What is going to drive change?***



# Sectors Driving Change in Canadian Agriculture

CHG1. Now, I'd like you to think about the future of Canadian agriculture over the next five years and the changes that will occur in the business of agriculture. Out of a total of 100%, how much change do you feel is being driven by each of the following four different groups?

**Mean**  
(including 0)

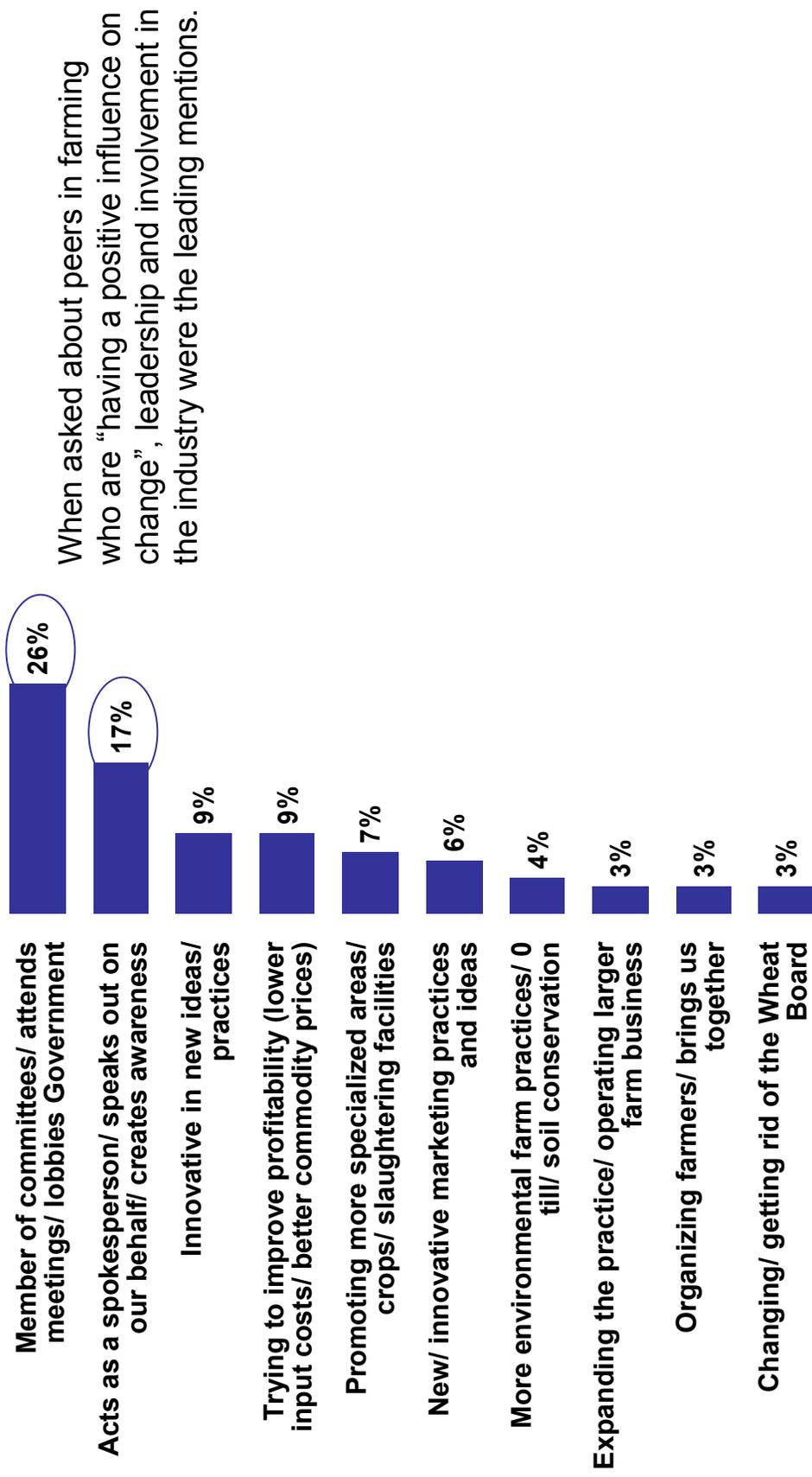


Base: All Respondents



# The Importance of Industry Leadership

chg6a. (Positive) What is the main thing that this farmer is doing to drive change in Canadian Agriculture?

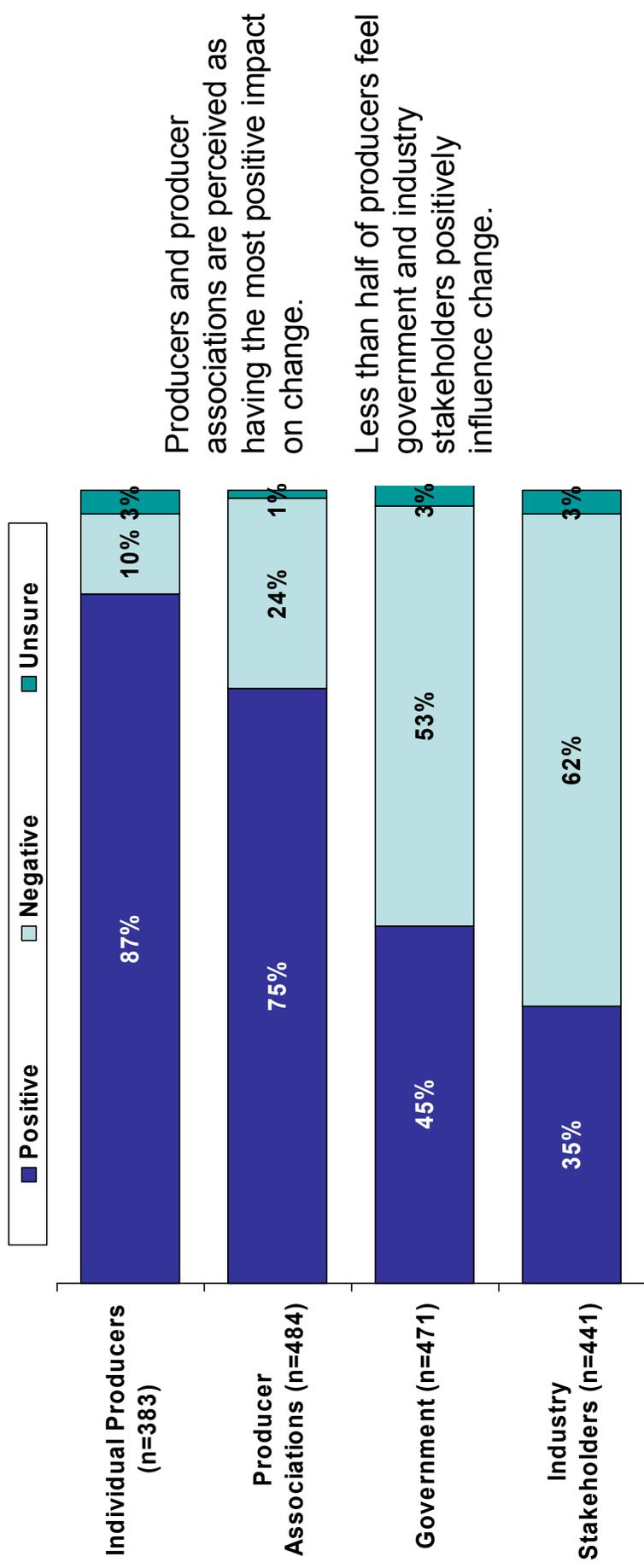


Base: Positive influence (n=337)



# Positive/ Negative Impact of Change Summary

Chg3/5. Is this farmer/association/government organization/company having a positive or negative influence on the future of agriculture?





## Young Farmer Needs Research

*Ontario Pork and Ontario Cattlemen's Association have Contracted Ipsos Reid to Conduct Qualitative Research to Understand the Needs and Drivers of Leadership and Success among Young Farmers...*



## Research Objectives

- *Identify what defines success and leadership along with the key measures of success and leadership*
- *Identify the key contributors of success and leadership for a younger farmer*
- *Determine and understand the key issues and challenges today that could be acting as barriers to success and leadership*
- *What industry issues are keeping younger farmers “up at night”*
- *Identify the sources of support that young farmers turn to for assistance in becoming more successful*
- *How are Association/Government/Industry programs contributing to the success and leadership of young farmers*

## Research Objectives

*We will also answer the following questions:*

- *What specific programs or support are being offered by each entity (government, producer association, industry)?*
- *What types of programs or support are expected of each entity?*
- *Which entities are excelling/falling short of expectations?*
- *What are the key areas of opportunity for support?*
- *In the case of producer associations, we will expand the discussion to include:*
- *Degree of involvement among all respondents in their local and/or provincial producer associations along with reasons why/why not*
- *Perceived relevance of specific organizations*
- *The perceived role of producer associations in terms of industry success and leadership*
- *Suggestions to encourage greater participation among young farmers*



# Methodology

We will conduct 6 focus groups with Ontario producers:

- 4 with younger farmers (<41 years old)
- 2 with more experienced farmers (41+ years old)

Experienced farmers are included in the research design to understand how things have changed and identify needs based on their experience.

The focus groups will be approximately 2 hours in length

Locations have yet to be determined, but will be based on concentration of farmers by main farm type:

- At this time, we will likely structure the groups around cattle and hog farmers as they are the primary sponsors of this study



## Deliverables

### *The Key Deliverables:*

- *A comprehensive final report including conclusions, implications and recommendations.*
- *In-person presentations of final results*
- *Distribution of a press release, prepared by Ipsos, that will be distributed to over 500 Canadian media members (both Ag and Non-Ag)*

### *Timelines:*

- *Focus groups are to be conducted in late June*
- *Final report to be delivered mid July*



**Thank you and Stay Tuned!**