

OPINION POLLING ON ONTARIO'S AGRI-FOOD SECTOR

NOVEMBER 2017 RESULTS

Introduction

- ✓ The OFA commissioned *Opinion Polling on Ontario's Agri-food Sector* survey in November 2017 to explore the attitudes and opinions of urban and suburban Ontarians towards the topics of agriculture, agri-food and rural affairs.
- ✓ For OFA and agricultural stakeholders to communicate effectively with urban consumers it's important to find out what consumers know and believe about agriculture and rural Ontario.
- ✓ The survey and data collection was conducted by Grassroots Public Affairs for the Ontario Federation of Agriculture.

Methodology

BASIC DISCLOSURE ELEMENTS	DETAILS
Survey sponsor	Ontario Federation of Agriculture
Population represented	Greater Toronto Area Residents (18+) (Geographic targeting was executed by way of respondents' Forward Sortation Areas)
Sample size	N=1003
Method of data collection	Online/Panel
Method of sampling	Quota Sampling
Dates of fieldwork	November 6, 2017 to November 9, 2017
Margin of sampling error for total sample	N/A for Online Polls (Comparable Margin of Error would be +/- 3.09 percentage points, 19 times out of 20)
Contact Information	Adrian Macaulay, Director of Research Grassroots Public Affairs adrian@grassrootspublicaffairs.com

EXECUTIVE SUMMARY

Executive Summary

✓ **Government Prioritization of Agriculture**

- Many Greater Toronto Area (GTA) residents believe the provincial government takes agriculture seriously and has made it a priority over other industries such as automotive or manufacturing.
- People under the age of 30 who live in urban Toronto hold the most critical and negative views of the agriculture and agri-food sector. This may be a result of having little or no exposure to agricultural issues or concerns.
- The more educated a respondent is, the less likely they are to believe that the government prioritizes agriculture over other industries such as automotive or manufacturing.

Executive Summary

✓ **Agriculture and the Economy**

- Overall, GTA residents hold positive views of farmers and the agriculture sector and believe it is an important contributor to the economy.

Executive Summary

✓ **Provincial Election Issues**

- Older respondents have a more positive outlook on rural communities
- The biggest detractor to living in a rural community is access to healthcare. Respondents over the age of 61 who have never lived in a rural community have very low interest in moving to a rural area and prefer living in an urban community.
- Respondents that live in suburban parts of the GTA hold significantly favourable views about the agriculture sector and are more likely to prioritize it than those living in urban Toronto.

Executive Summary

✓ **Provincial Election Issues cont'd.**

- Younger and urban Toronto residents were more likely to prioritize issues like transportation and housing over issues such as immigration or agriculture and rural development.
- The economy had the highest level of respondents listing it as their number one priority. Healthcare was a close second. Immigration and trade were among the least important priorities.
- Agriculture was seen as a mid-level priority and many respondents rated agriculture and rural development between four and eight on a 10 point priority scale.

Executive Summary

✓ **Rural vs Urban**

- Approximately four in five younger respondents (aged 18-30) and seven in ten respondents (aged 31-45) have never lived in a rural community and are more likely to prioritize issues such as housing and transportation rather than agriculture and rural development.
- Overall, GTA residents hold positive views of farmers and the agriculture sector and believe it is an important contributor to the economy.
- Urban residents were more likely to believe that the government allocates a greater level of assistance to rural parts of the province as opposed to cities.

Executive Summary

- ✓ **Education, Innovation and the Future of Agri-Food**
 - Respondents over the age of 61 are significantly more likely to be supportive of agriculture and rural affairs than younger respondents 45 or younger.

Executive Summary

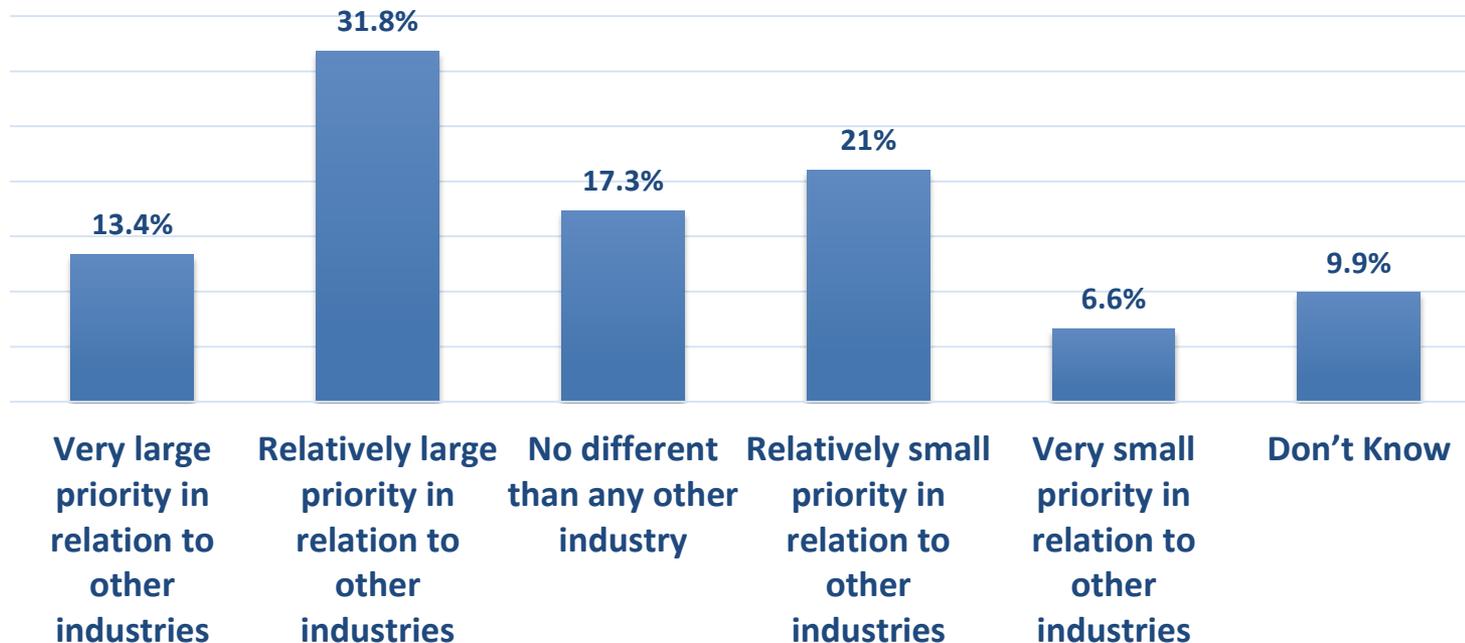
✓ **Agriculture and the Environment**

- Suburban GTA residents were more likely to see the agriculture sector as having a positive impact on the environment, whereas urban Toronto residents were more critical of the environmental impact of the sector.
- Younger people were more likely to see agriculture as having a net-negative impact on the environment as opposed to older respondents who believe the agriculture sector is having a positive impact on the environment.

SURVEY RESULTS

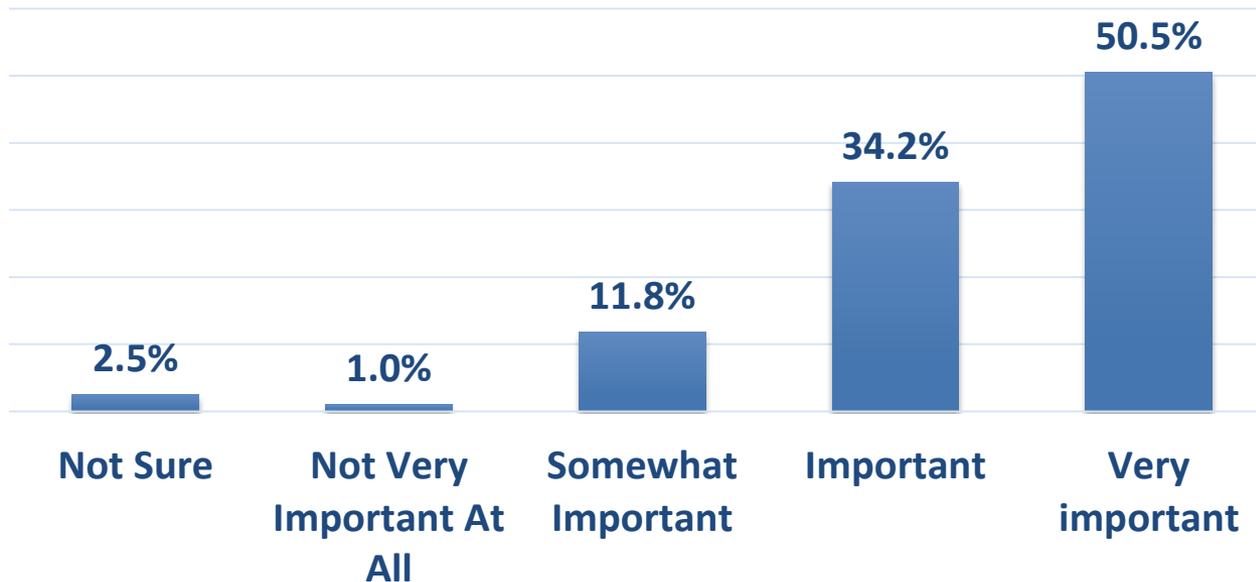
Government Prioritization of Agriculture

“How big of a priority do you believe the agriculture (farming) sector currently is to the Ontario government in relation to other industries such as automotive or manufacturing?”



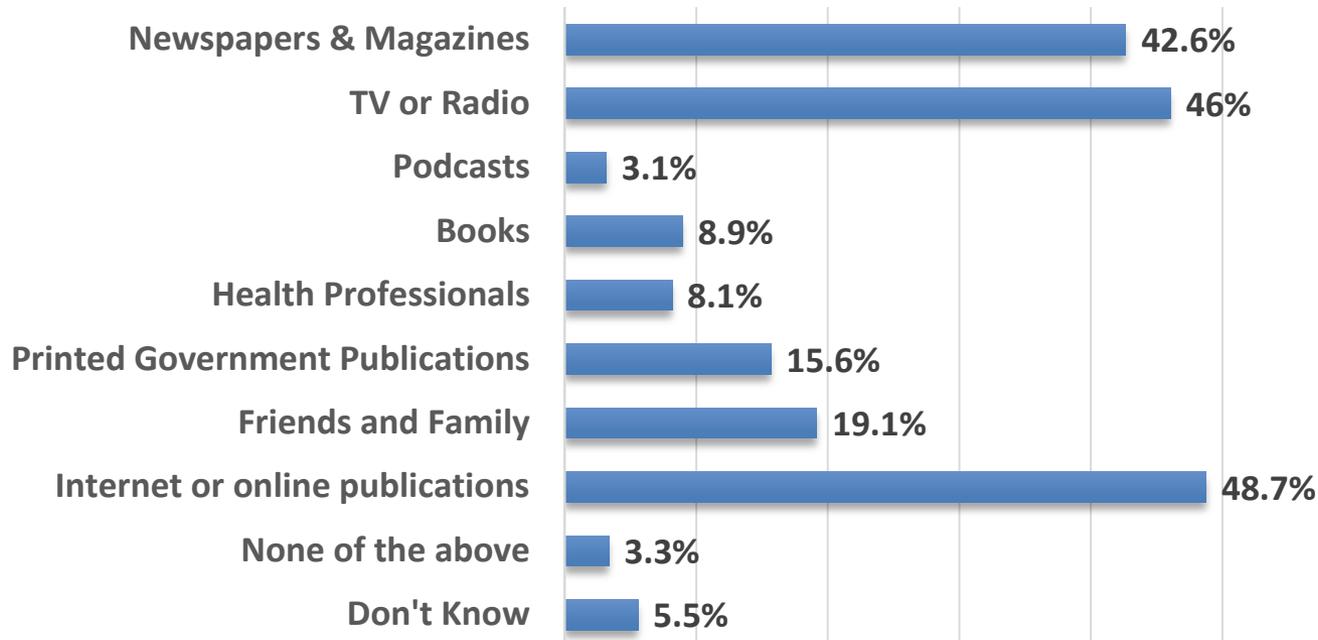
Agriculture and the Economy

“How important is it to you that Ontario have a strong agriculture (farming) sector as part of its economy”?



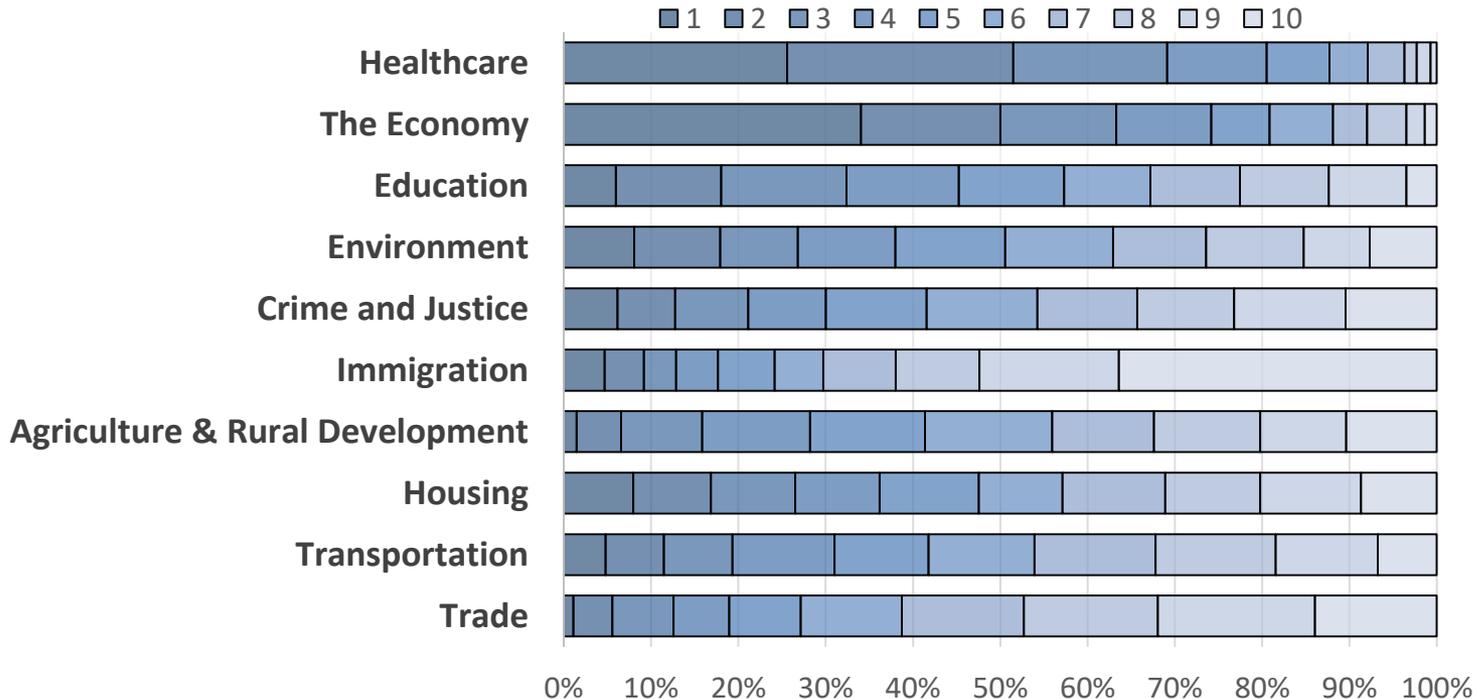
Dissemination of Agricultural Information

*“When thinking about how you acquire information about agriculture (farming), what would you say your *main* sources of information to be”? (Click all that apply)*



Dissemination of Agricultural Information

“An election is scheduled for June 7, 2018. Please rank the following policy concerns based on their level of importance to you. One meaning most important issue with ten meaning least important”:

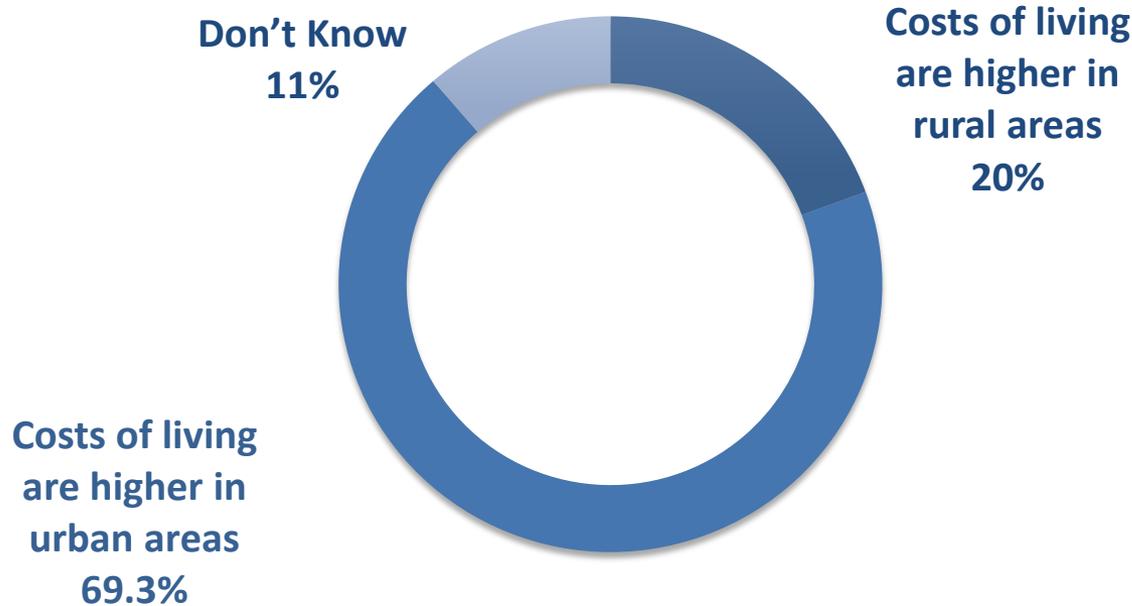


Dissemination of Agricultural Information

- ✓ **The economy appears to be the most important issue for more than a third of GTA residents (34.1%), however more than half of respondents (51.5%) listed healthcare as either their first or second most important issue.**
- ✓ **Immigration was the least popular issue for GTA resident with approximately four in ten (36.5%) ranking it as a 10 or the lowest possible level of importance.**

Cost of Living: Urban/Rural

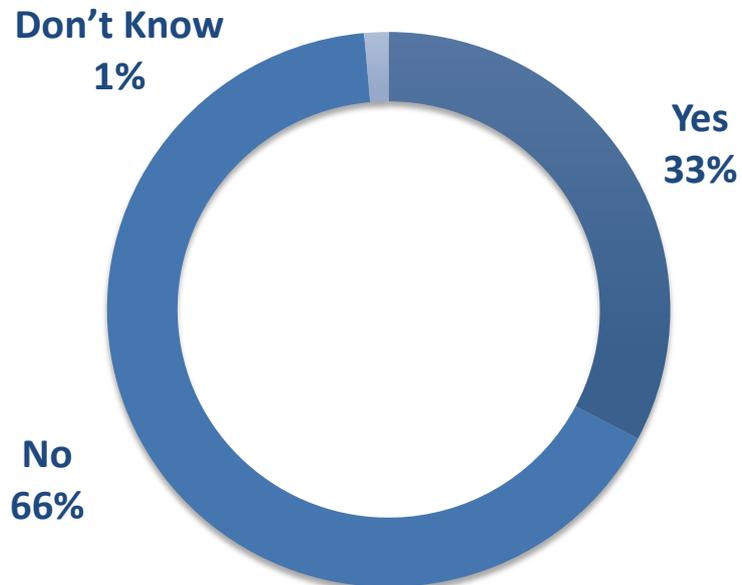
“Do you think the costs of living are higher in rural or urban areas of the province?”



Lived Experiences: Urban/Rural

“Have you ever lived in a rural community

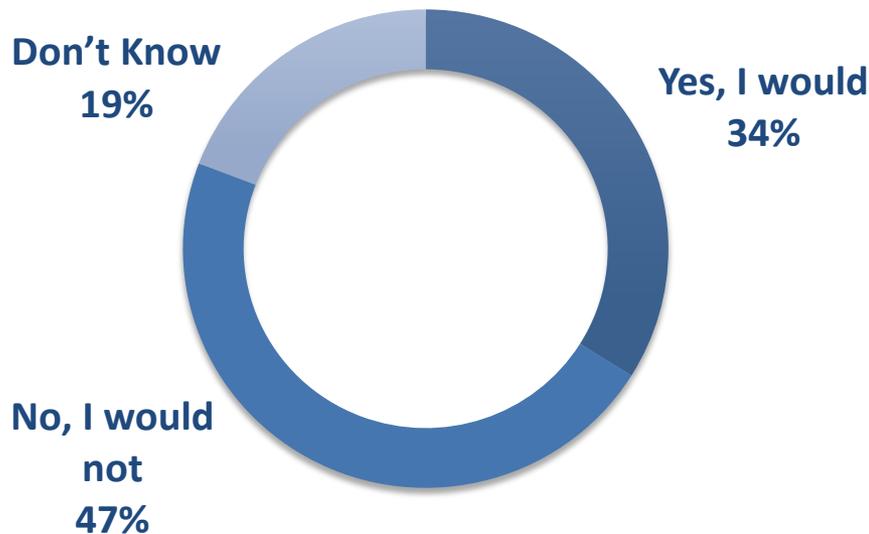
(less than 50,000 people)”



Lived Experiences: Urban/Rural

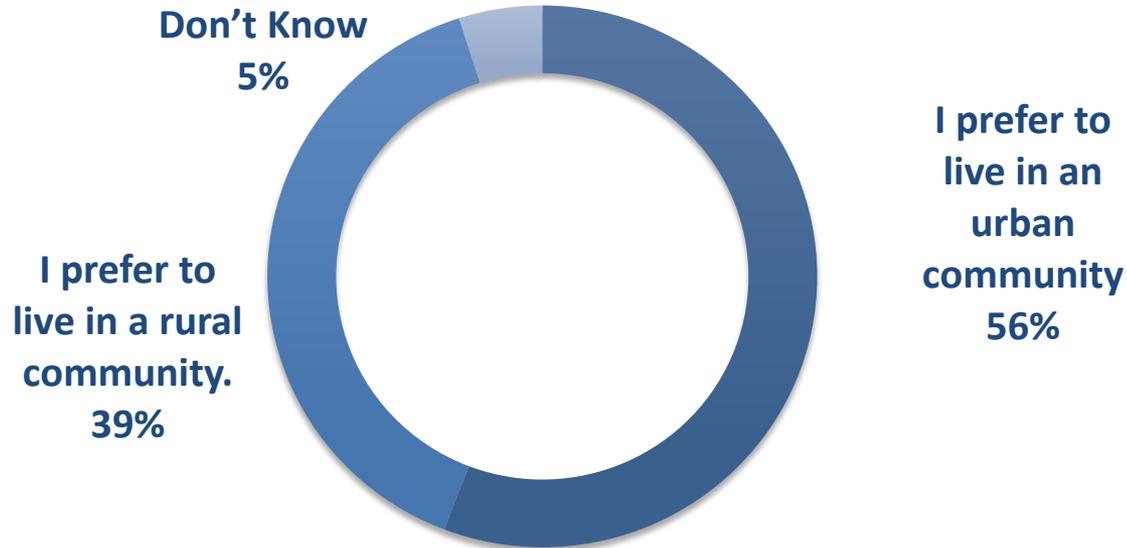
(Among those who have never lived in a rural community)

“Looking ahead to the next 10-15 years, would you consider moving to a more rural community (<50,000 people)”



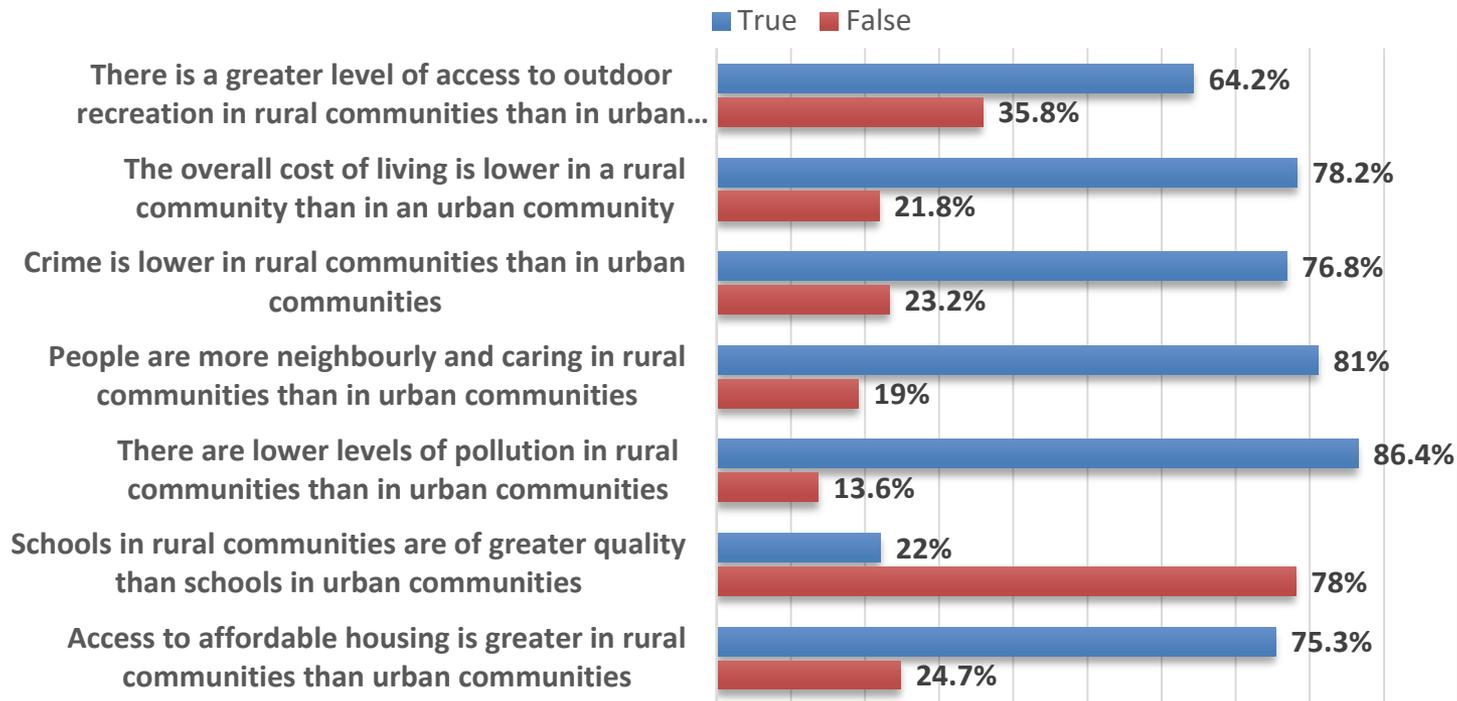
Lived Experiences: Urban/Rural

(Among those who have lived in a rural community)
“Do you prefer living in an urban community or do you prefer living in a rural community (<50,000 people)”?



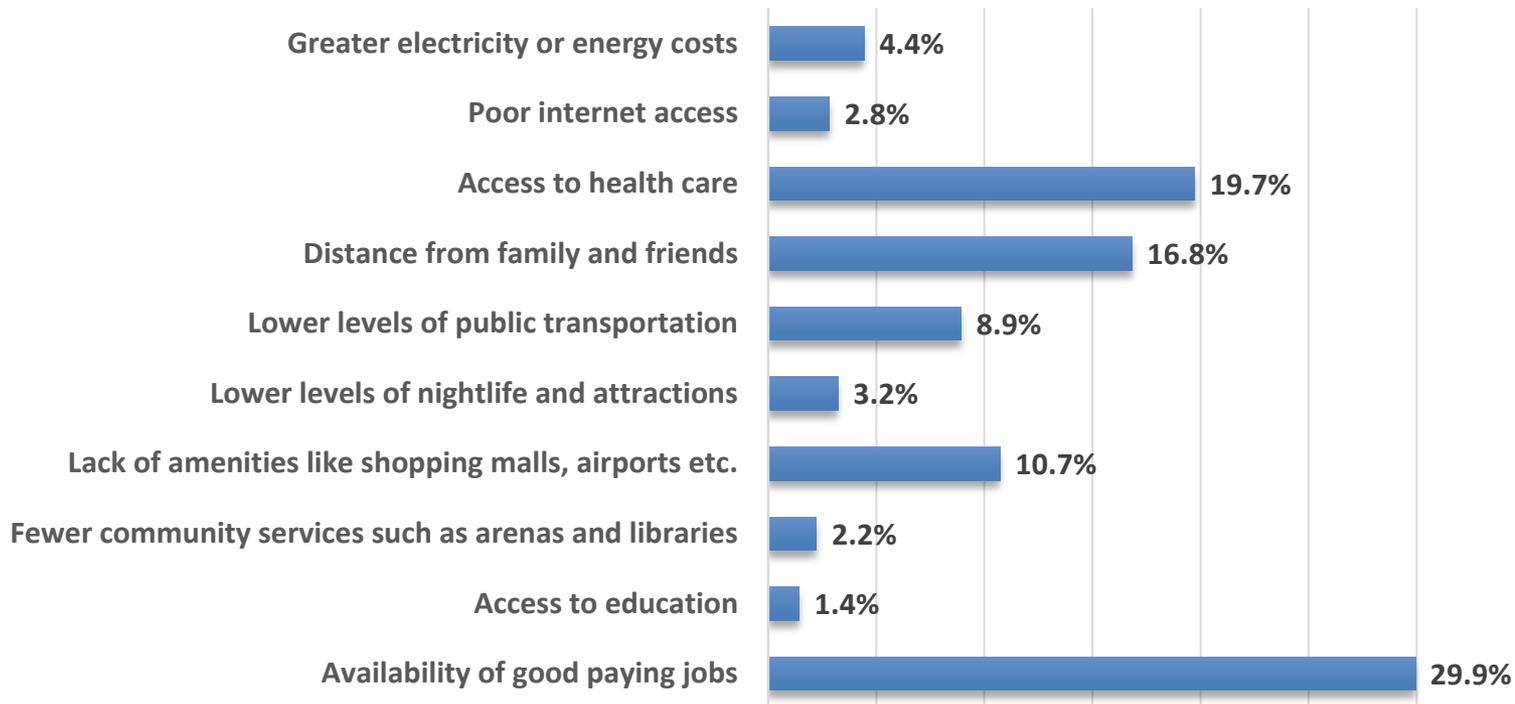
True or False: Urban/Rural

“Below you will find a series of statements comparing rural and urban communities. Please tell us which of the following you believe to be true or false”.



Biggest Detractor to Rural Living

“Please tell us what you believe to be the biggest detractor to living in a rural community”

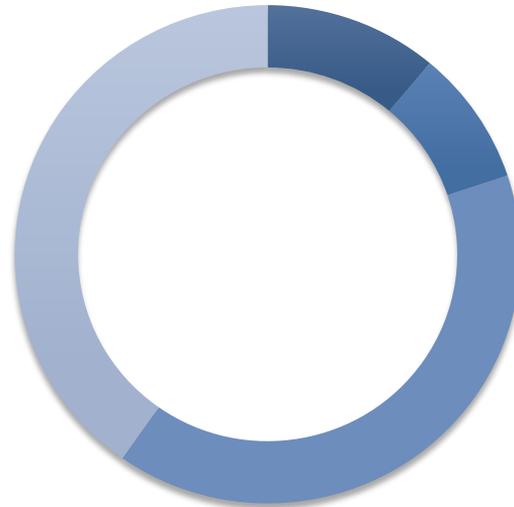


Levels of Government Support: Urban/Rural

“Do you believe the Ontario government is providing assistance to rural parts of the province and cities evenly?”

**Yes, government assistance is provided evenly across rural parts of the province and cities.
11%**

**Don't Know
40%**



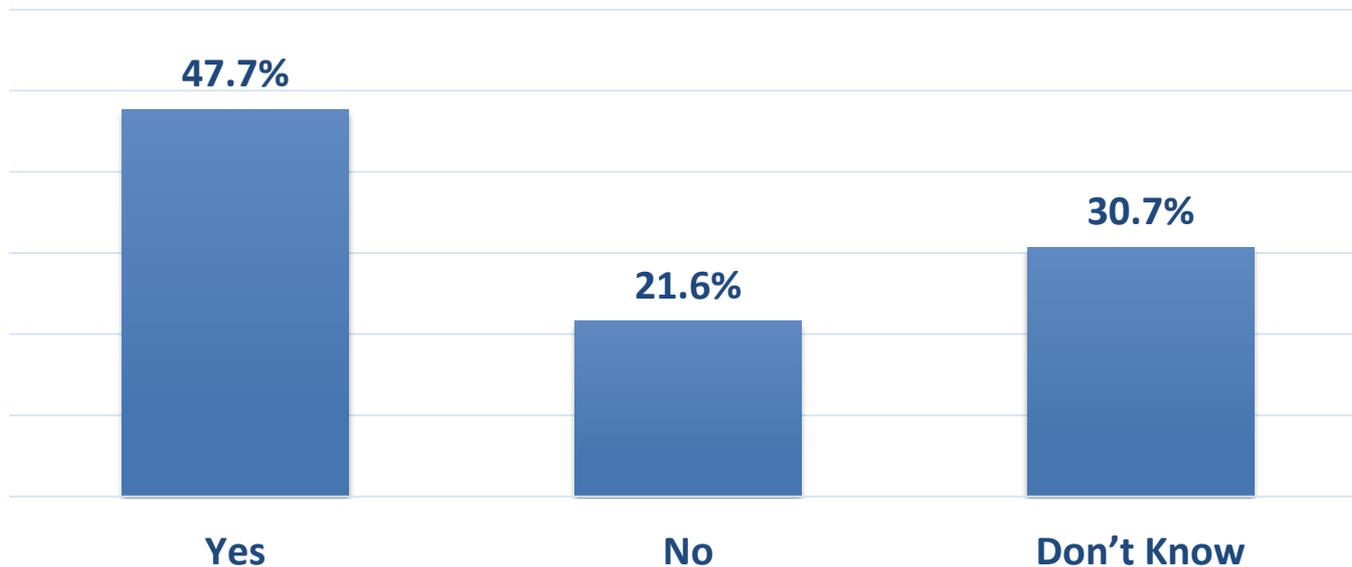
**No, rural parts of the province are receiving more government assistance than cities
9%**

**No, rural parts of the province are receiving less government assistance than cities
40%**

Future Careers and Education in Agri-Food

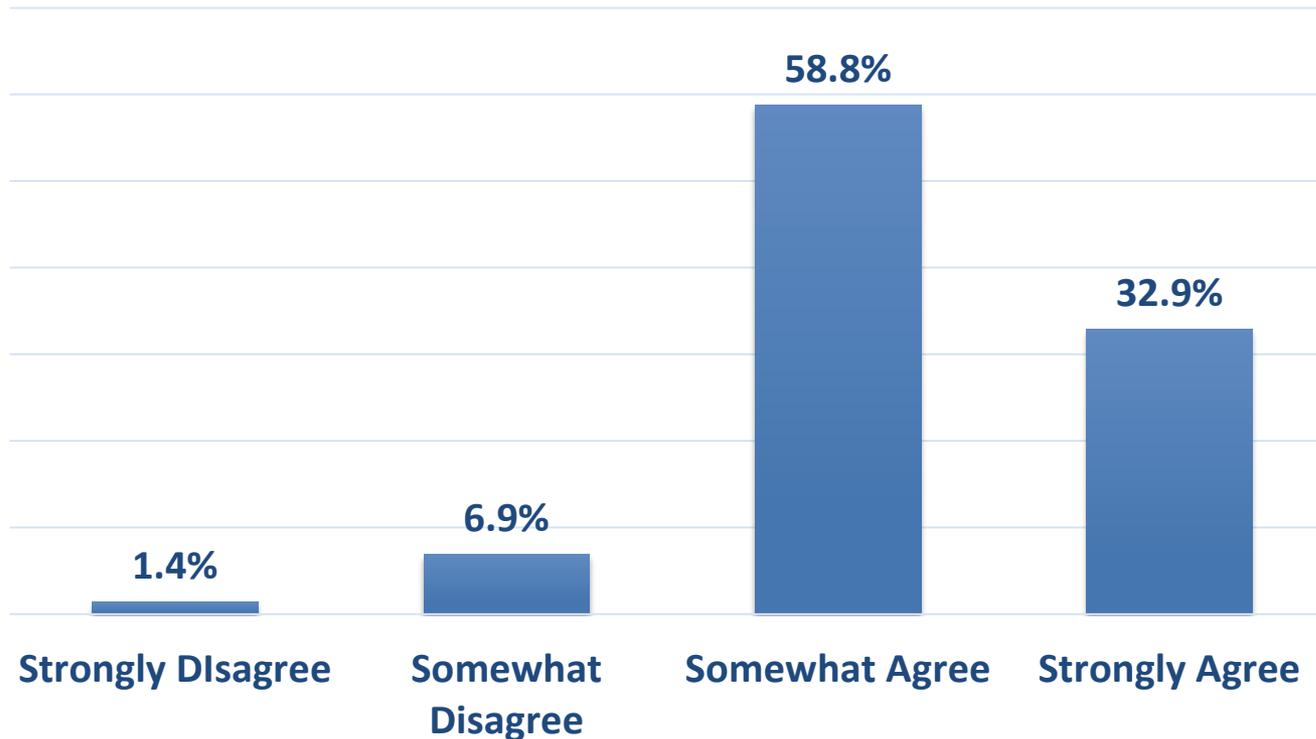
“Would you recommend someone younger than you to pursue an education and/or a career in the agri-food sector

(The industry that includes the growing and cultivation of crops and livestock as well as the processing of finished food products)”



Support for Agricultural Research and Innovation

“The government of Ontario should increase funding for agricultural research and innovation”.

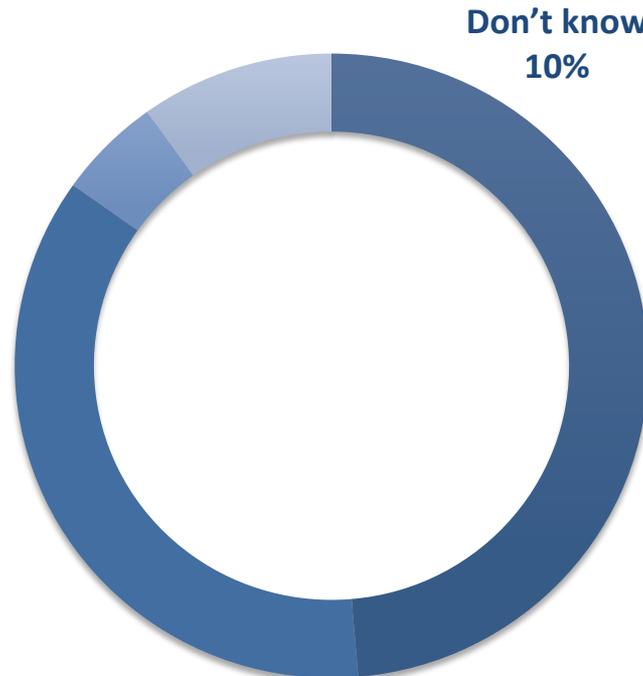


Support for Agricultural Research and Innovation

“Which of the following statements do you believe best represent your attitude towards the agri-food sector’s impact on the environment?”

The agriculture industry is more harmful to our environment than other industries
5%

The agriculture industry is no more or less harmful to our environment than other industries
36%

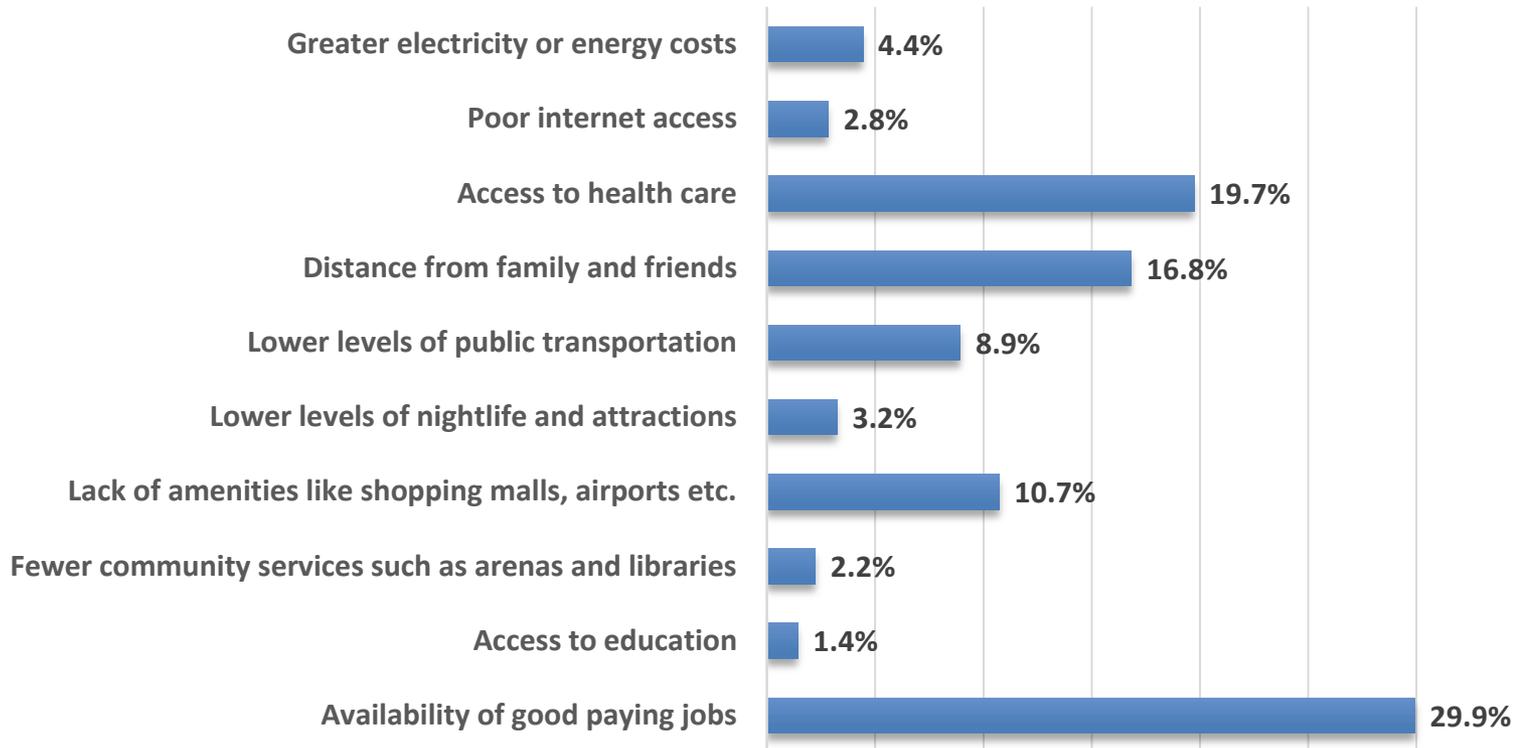


Don't know
10%

The agriculture industry contributes to an improving and healthier environment
49%

Biggest Detractor to Rural Living

"Please tell us what you believe to be the biggest detractor to living in a rural community"



CONCLUSIONS AND RECOMMENDATIONS

Conclusions and Recommendations

- ✓ If the provincial government were to pledge a high level of financial support for agriculture and rural development it would be generally well-received.
 - The group that would oppose the announcement would be urban Toronto residents under the age of 30 who do not believe that agriculture is a salient issue to them.
- ✓ Suburban GTA residents are significantly more open minded to the idea of rural living and have significantly greater exposure and likelihood of supporting the agricultural sector.
- ✓ The availability of economic opportunity (jobs) and health care are the biggest detractors to living in rural Ontario.