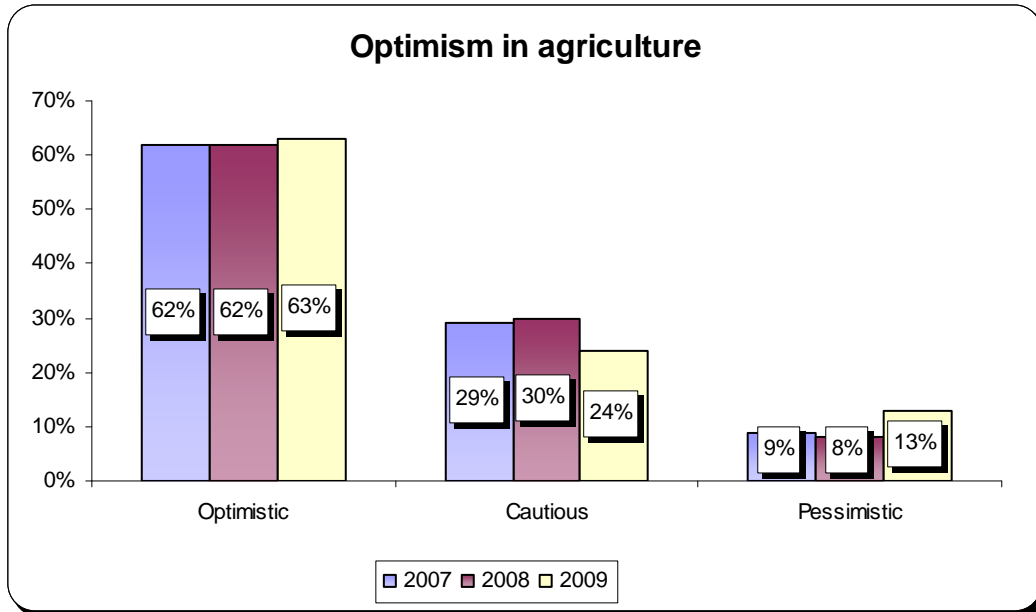


Appendix F: Provincial Findings: Quebec

Results: Optimism in agriculture¹

In 2009, six in ten Quebec respondents (63%) report being optimistic. There has been no significant change in the optimism levels of Quebec respondents between the results of previous years.



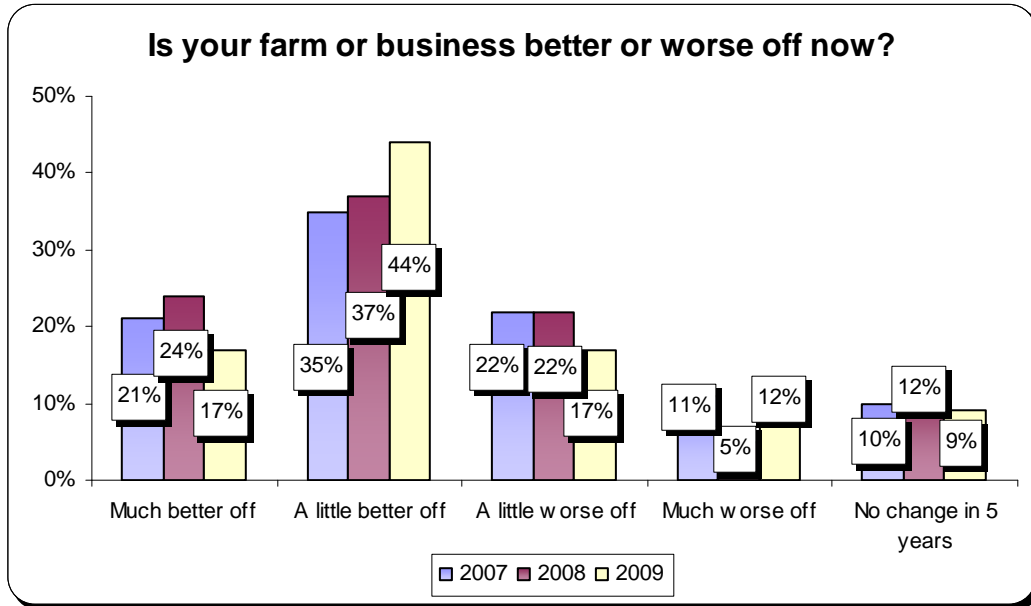
Results by sector: 2009

Respondents in the dairy (72%) and poultry (76%) sectors are significantly more likely to be optimistic about the future of Canadian agriculture compared to beef respondents (41%).

¹ The definition of optimism can be found in the national Optimism in Agriculture report.

Results: Is your farm or business better or worse off now?

Forty four percent of Quebec respondents believe that their farms or businesses are a little better off now than they were five years ago. There are no significant differences between the results of previous years.



Overall, do you believe that your farm or business is better off or worse off now than it was five years ago?
(n = 511, 2007; n = 517, 2008; n = 618, 2009)

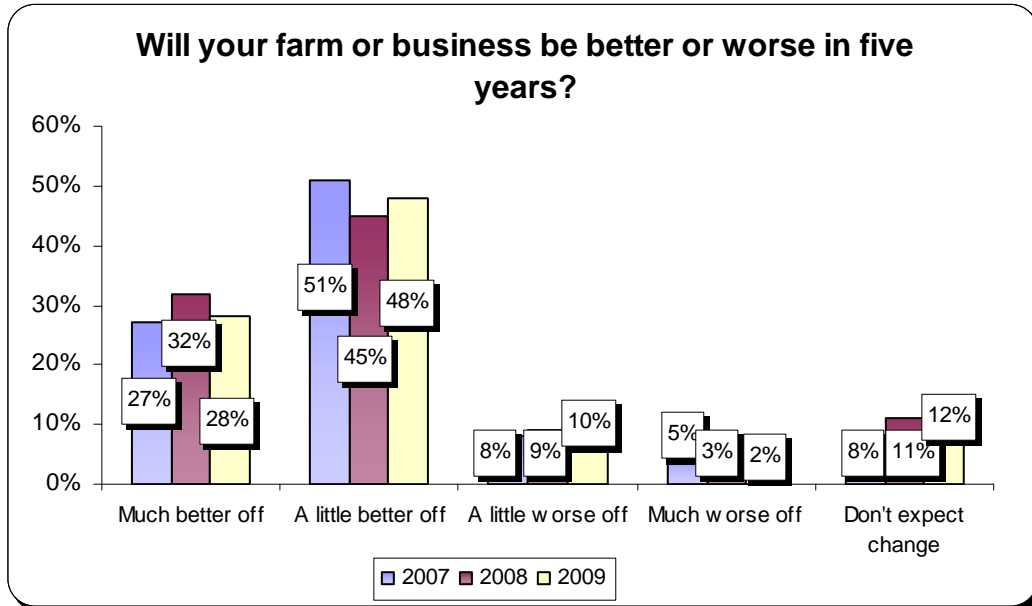
"I think that our succession will make investments in the operation which will put then in a better place if the economic conditions remain the same." – Quebec dairy producer

Results by sector: 2009

Respondents in the poultry sector are significantly more likely to believe that their farms or businesses are much better off (41%) compared to crop (16%), dairy (16%) and beef (9%) respondents.

Results: Will your farm or business be better or worse in five years?

Over one quarter of respondents from Quebec in 2009 (28%) believe that their farms or businesses will be much better off in five years. There is no significant difference between the results of previous years.



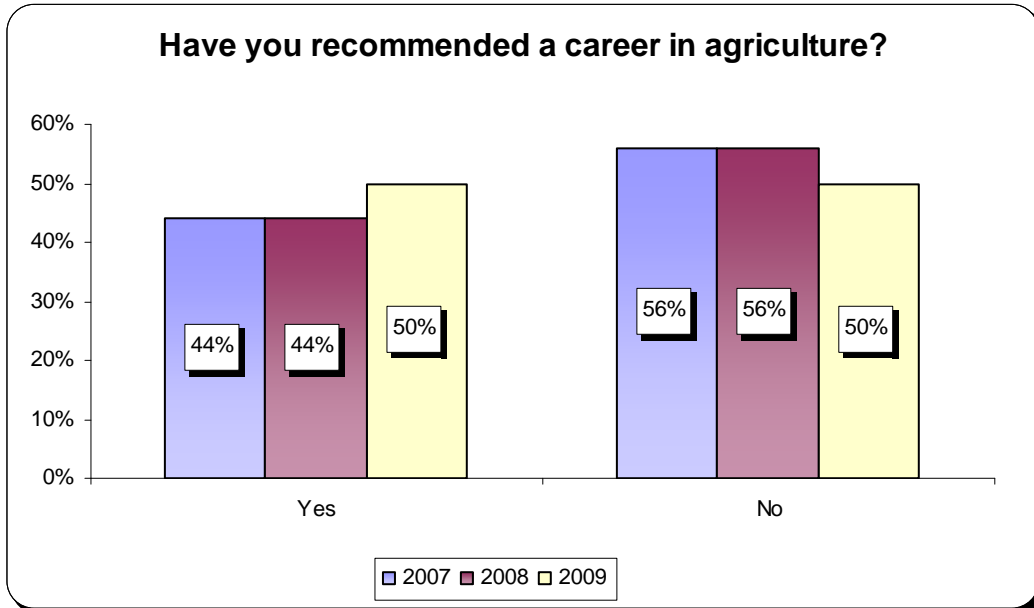
Looking ahead, do you believe that your farm or business will be better off or worse off in five years than it is now? (n = 511, 2007; n = 517, 2008; n = 618, 2009)

Results by sector: 2009

Beef respondents (9%) are significantly *less* likely to believe that their farms or businesses will be much better off five years from now compared to respondents from all other sectors. There are no other significant differences to report.

Results: Have you recommended a career in agriculture?

In 2009, half of all Quebec respondents (50%) report that they have recommended a career in agriculture to a friend or family member in the past year. There is no significant difference between the results of previous years.



Over the past year, have you recommended a career in agriculture or an agricultural related field to a friend or family member? (n = 511, 2007; n = 517, 2008; n = 618, 2009)

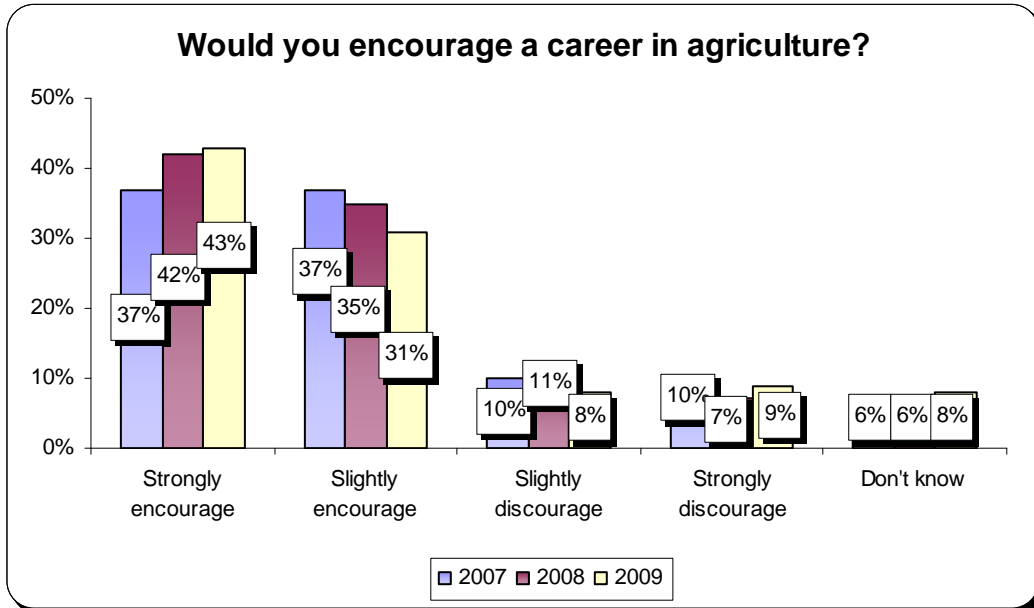
“I would encourage people, but I would warn them: you need to work a lot harder than the average person and you need to accept that you will receive a lower salary than the average person. Working in agriculture is a way of life and you have to be passionate!” – Quebec dairy producer

Results by sector: 2009

Compared to respondents from all other sectors, beef respondents (23%) are significantly **less** likely to state that they have recommended a career in agriculture over the past year. There are no other significant differences to report.

Results: Would you encourage a career in agriculture?

Two in five Quebec respondents (43%) in 2009 report that they would strongly encourage a career in agriculture to a friend or family member. There are no significant differences between the results of previous years.



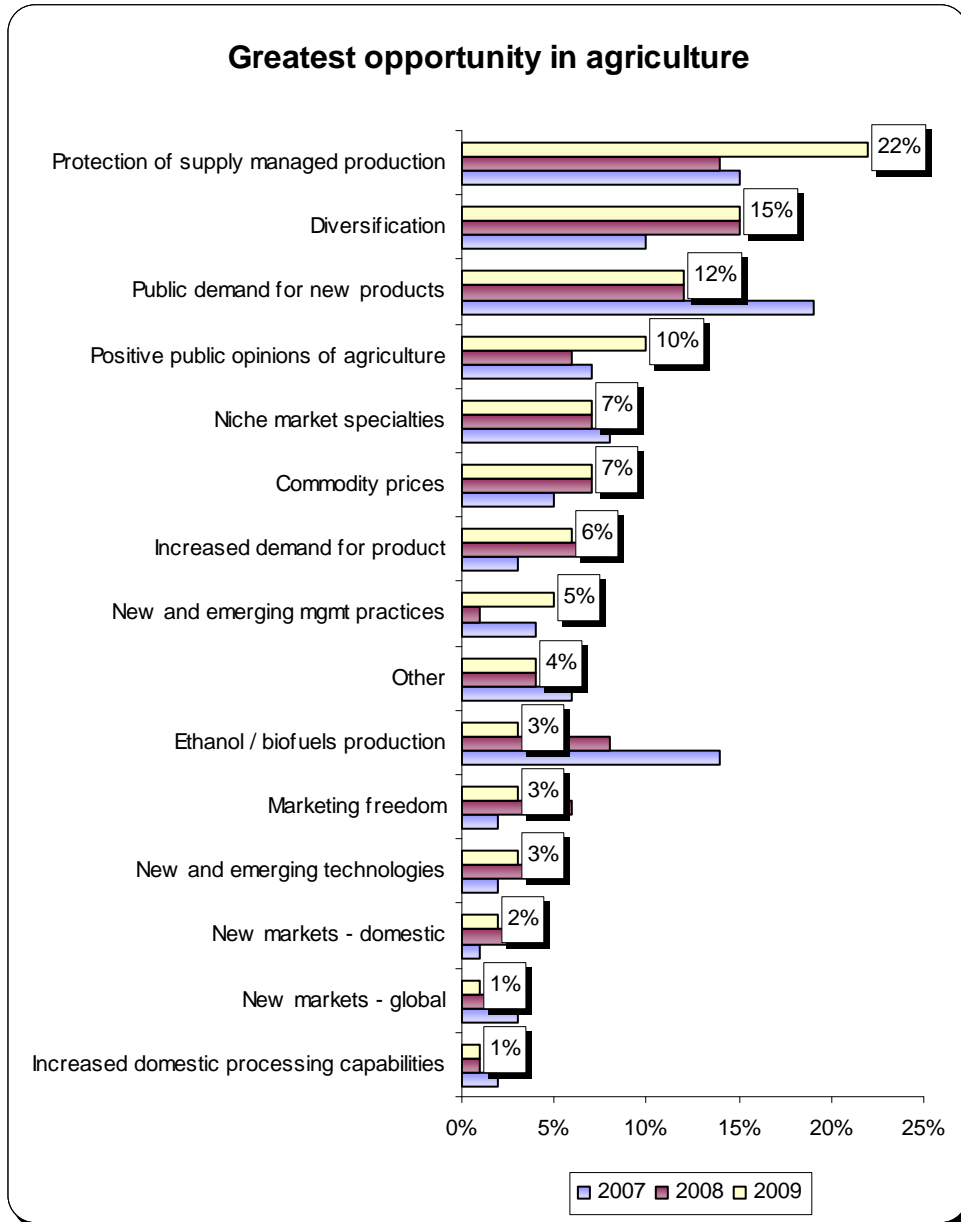
If a friend or family member was considering a career in agriculture or an agricultural related field, would you encourage them to enter the field? (n = 511, 2007; n = 517, 2008; n = 618, 2009)

Results by sector: 2009

Dairy respondents are significantly more likely to report that they would strongly encourage a career in agriculture to a friend or family member (50%) than crop respondents (31%). Additionally, crop (44%), dairy (34%) and poultry (41%) respondents are significantly more likely to report that they would slightly encourage a career in agriculture compared to beef respondents (14%).

Results: Greatest opportunity in agriculture

Quebec respondents in 2009 are significantly **less** likely to cite ethanol/biofuel production (3%) as the greatest opportunity in agriculture compared to 2007 (14%). Conversely, respondents from Quebec are significantly more likely to identify the protection of supply managed production as the greatest opportunity in 2009 (22%) than in 2008 (15%).



What do you see as the greatest opportunity in agriculture as a whole over the next year? Please select one only. (n = 511, 2007; n = 517, 2008; n = 618, 2009)

“New markets and new production are making things self sufficient.” – Quebec dairy producer

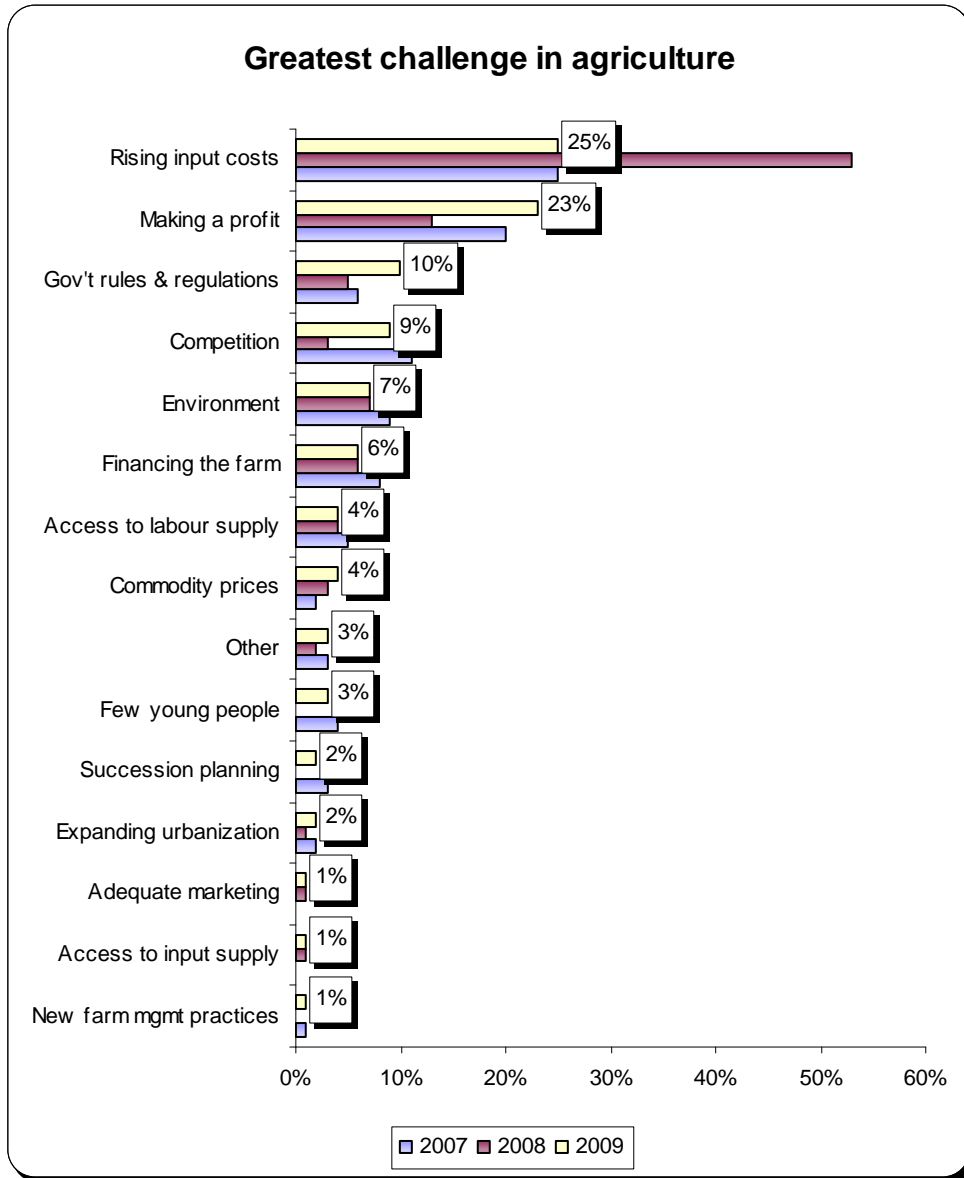


Results by sector: 2009

Respondents in the dairy sector are significantly more likely to cite protection of supply managed production (41%) as the greatest opportunity in agriculture compared to crop (16%) and beef (14%) respondents. There are no other significant differences to report.

Results: Greatest challenge in agriculture

Quebec respondents are significantly more likely to cite making a profit as the greatest challenge in 2009 (23%) compared to 2008 (13%). Meanwhile, they are significantly *less* likely to cite rising input costs as the greatest challenged in 2009 (25%) compared to 2008 (53%).



What do you see as the greatest challenge in agriculture as a whole over the next year? Please select one only. (n = 511, 2007; n = 517, 2008; n = 618, 2009)

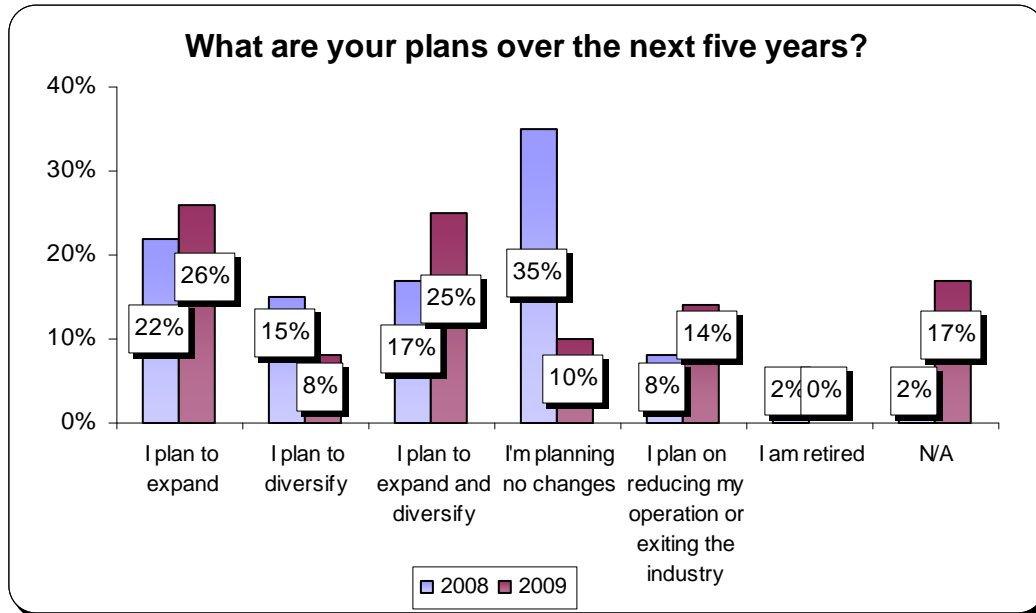
“Lower prices for us and higher costs. We will see even more leaving farming. In our small community quite a few have and others are trying to leave but may have too much debt to liquidate.” – Quebec beef producer

Results by sector: 2009

Beef respondents are significantly more likely to cite making a profit (41%) as the greatest challenge in agriculture compared to crop respondents (20%). There are no other significant differences to report.

Results: Future plans²

In 2009, Quebec respondents (25%) are significantly more likely to report that they plan to expand and diversify over the next five years compared to what they reported in 2008 (17%). Additionally, Quebec respondents are significantly **less** likely to report that they plan on making no changes to their operation in 2009 (10%) compared to 2008 (35%).



Looking ahead, what are your plans for your farm or business over the next five years? (n = 517, 2008; n = 618, 2009)

Results by sector: 2009

Respondents in the dairy sector are significantly more likely to report that they plan to expand their farms or businesses (40%) compared to respondents in most other sectors. Crop respondents are significantly more likely to report that they plan to expand and diversify their farms or businesses (34%) compared to dairy (18%) and beef (9%) respondents. Compared to dairy (9%) and poultry (6%) respondents, beef respondents are significantly more likely to report that they plan on reducing their operations or exiting the industry (32%).

² This was a new question added to the 2008 survey, therefore there is no comparison to 2007.