

Producer and Public Attitudes and Practices Study

Centre for Organizational Governance in Agriculture –
Building for our Future (February 28, 2014)

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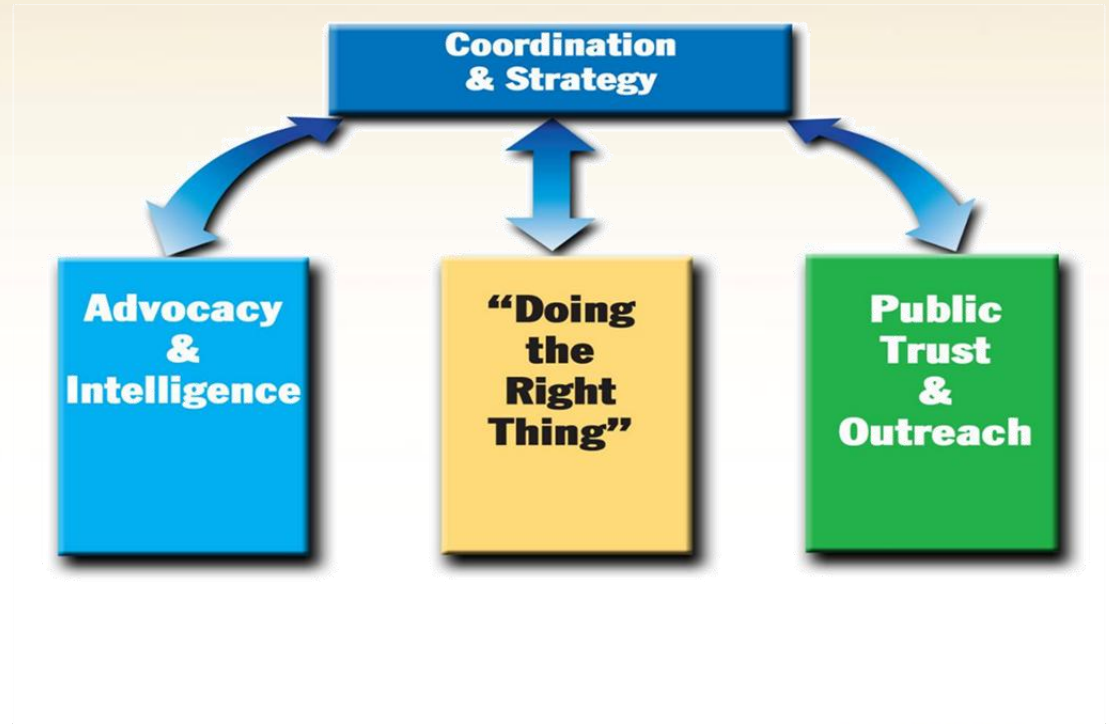


- Consumer Perceptions
- Producer Attitudes and Practices
- Overlap and Opportunities
- Gaps and Opportunities
- Recommendations



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- Mandate
- Membership
- Scope of Activities



References

- Study of Canadian Attitudes Towards Food and Farming Public Studies – 2006, 2009, 2012 (Farm and Food Care Ontario)
- Ontario Producers' Environmental and Animal Welfare Attitudes and Practices (Producer Study) – 2013 (Farm and Food Care Ontario)



References

- Canadian Producer and Citizen Perspectives on Farm Animal Welfare, 2013 (J Spooner, UBC),
- Large Commercial Producer Survey (Purdue University, 2013)



The Public: Attitudes and Perception



Methodology

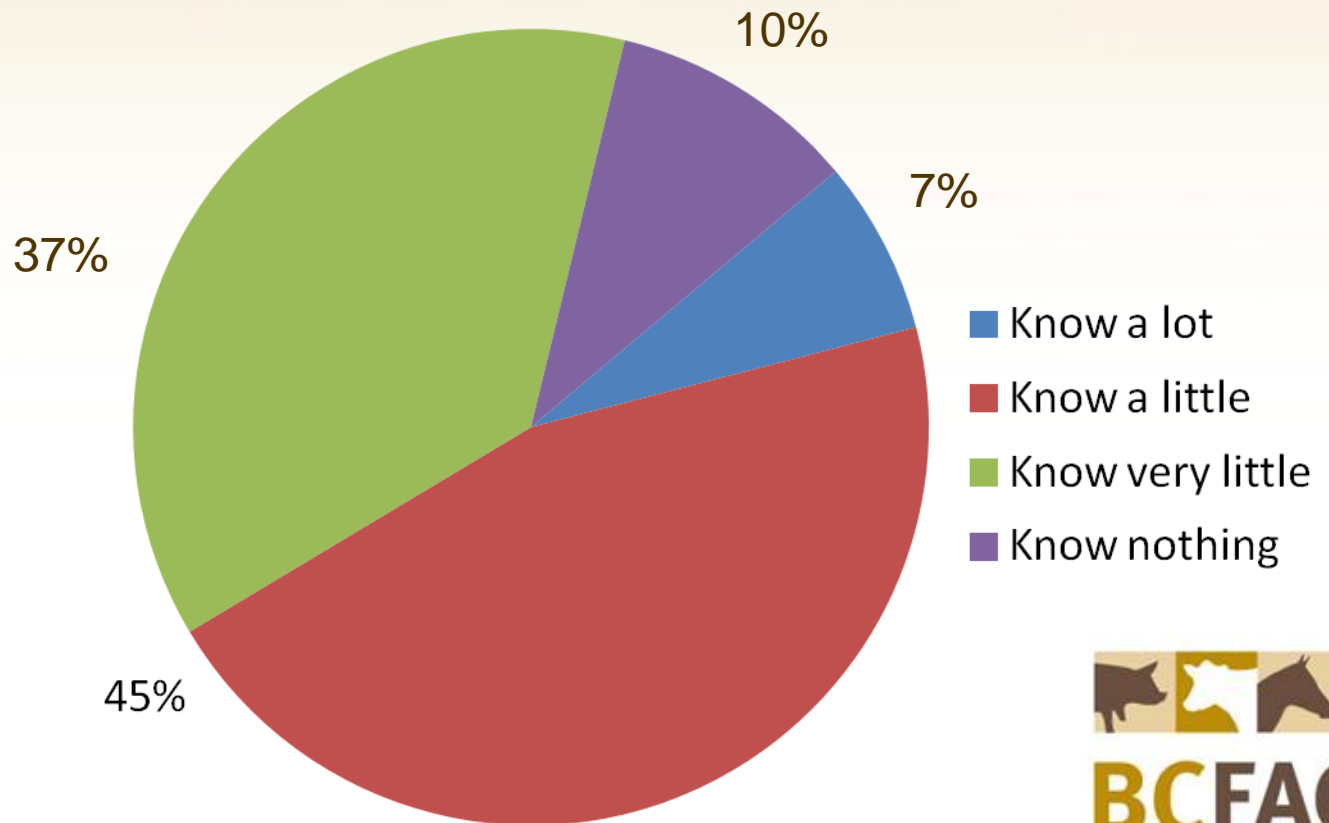
- Online survey via Ipsos Household Panel (200,000+) Canadian adults
- Non-agriculture participants
- Surveys were fielded between August 17th and August 23th, 2012.
- Data weighted by region, gender and age to be representative of the Canadian
- Follow up focus groups across Canada

Province	Sample Size
Atlantic	206
Quebec	308
Ontario	308
Manitoba	101
Saskatchewan	100
Alberta	101
British Columbia	105
Total	1,229

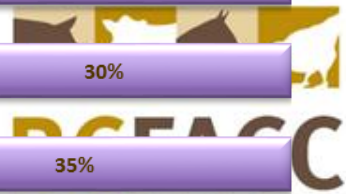
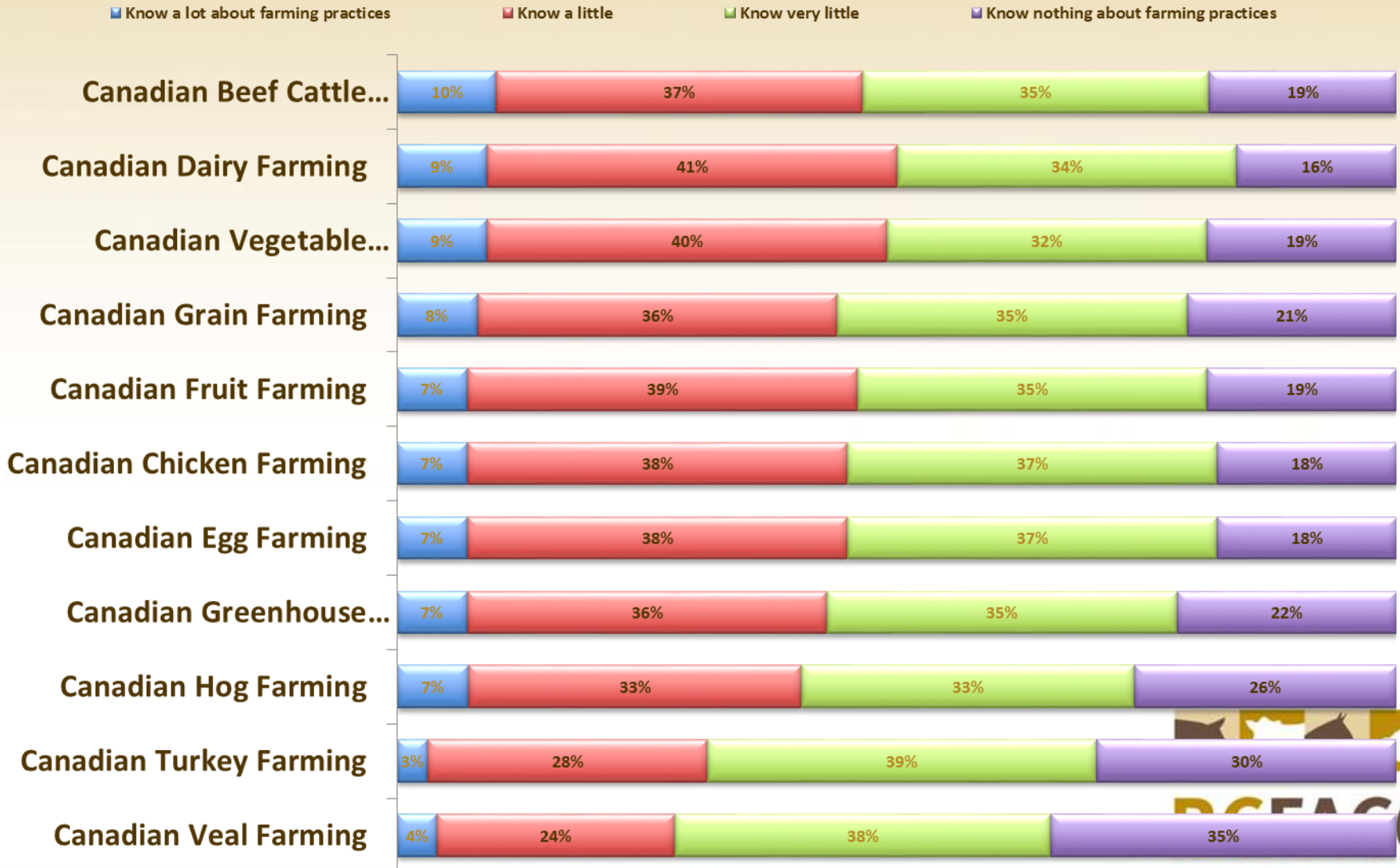


Our Challenge

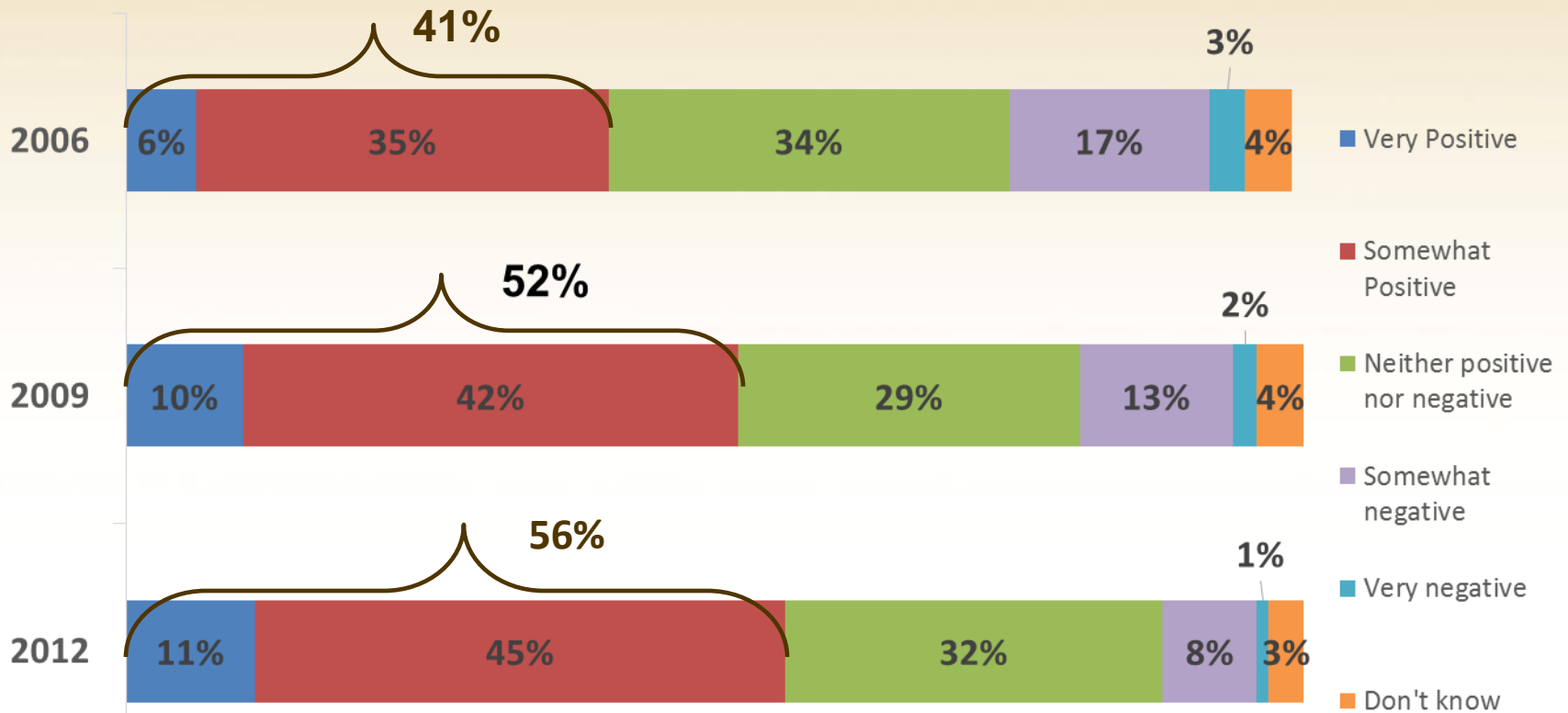
- Canadians level of knowledge of farming practices
 - 93% know little, very little or nothing



Knowledge About Farm Types

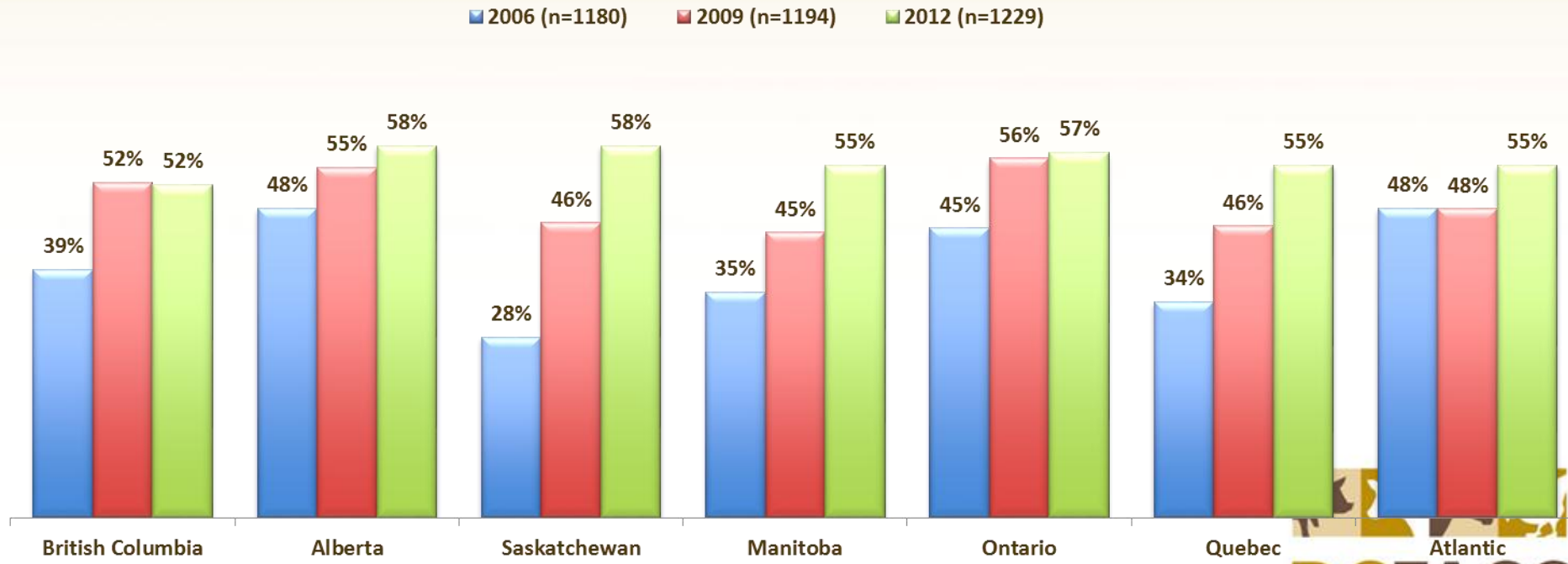


Canadians Overall Impression of Canadian Agriculture

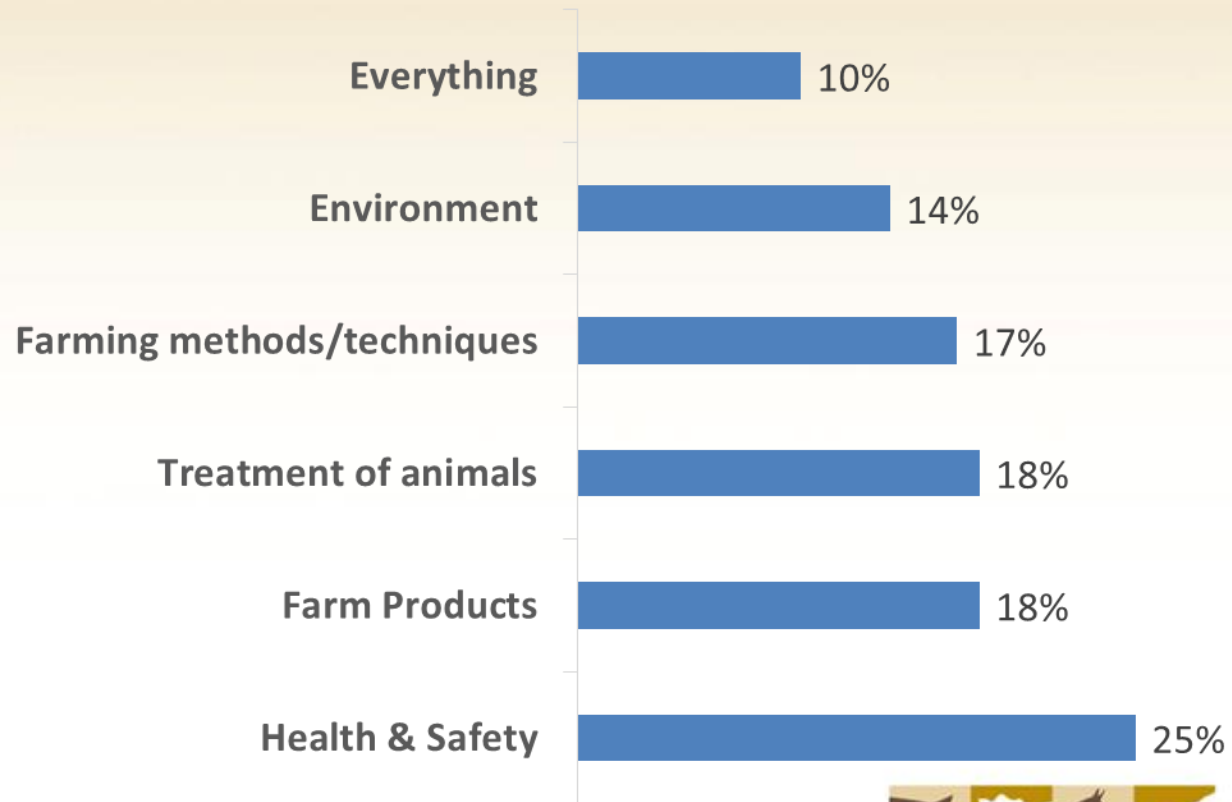
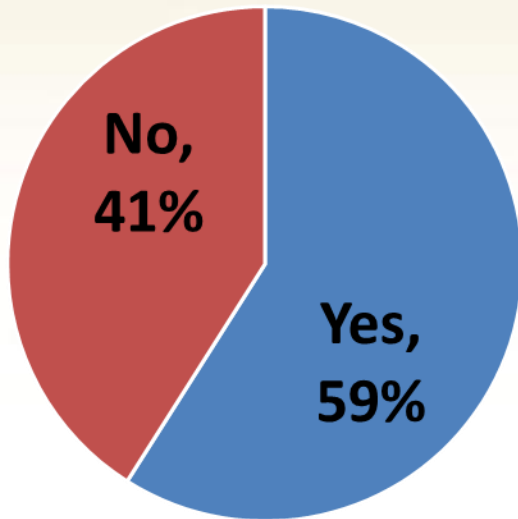


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Respondents Who Have Positive Impressions



Do They Want to Know More?



What are Canadians Asking About?

- Confinement – cages, cannot go outside, stocking densities
- Production practices – beak trimming, castration, dehorning
- Antibiotics and hormones
- Livestock transportation and handling

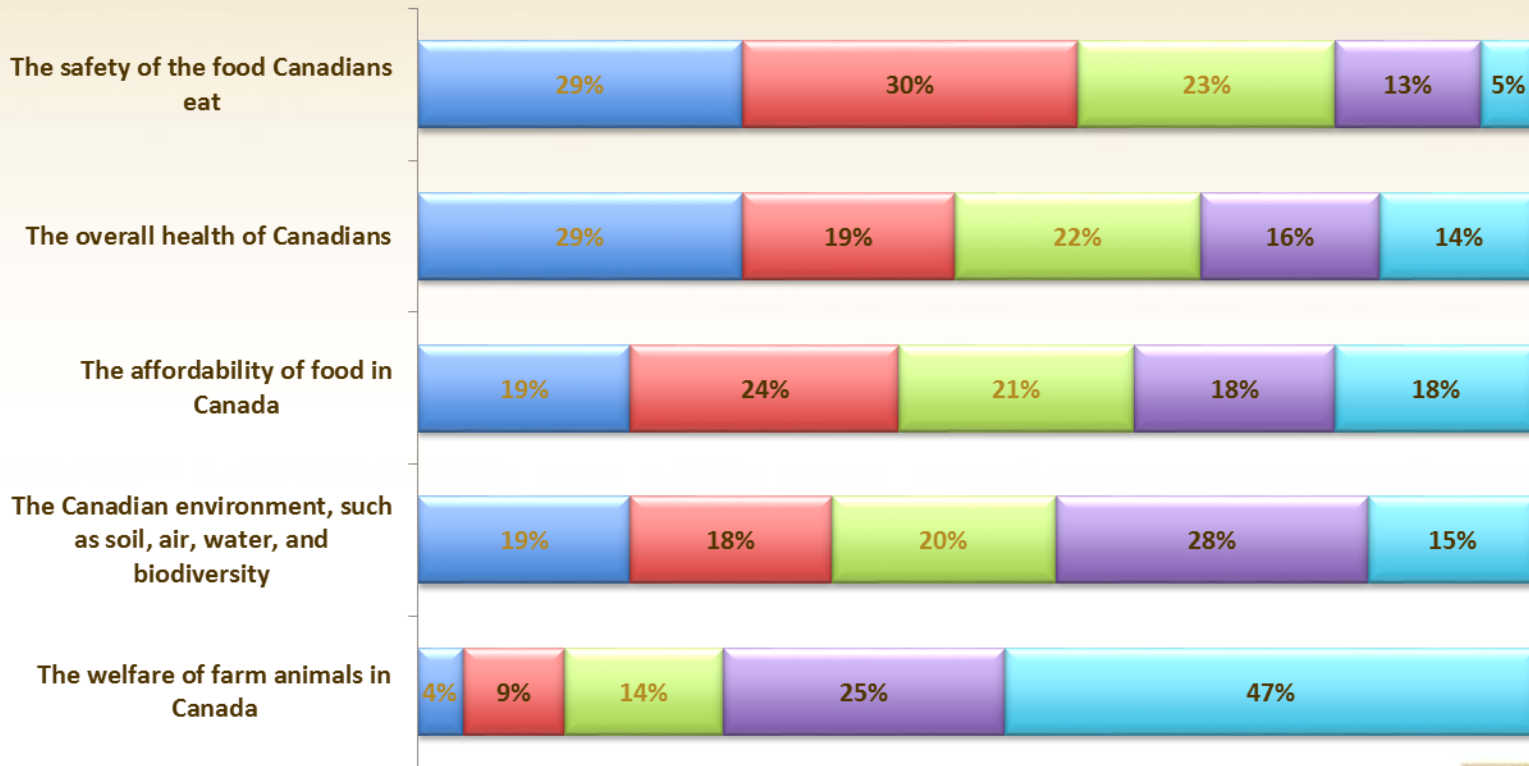


What are Canadians Asking About?

- Pesticide
- Water use
- Environmental impacts
- Sustainability
- Genetically Modified Organisms (GMOs)
- Factory farming = ALL OF THE ABOVE



5 Pillars of Sustainable Food Production

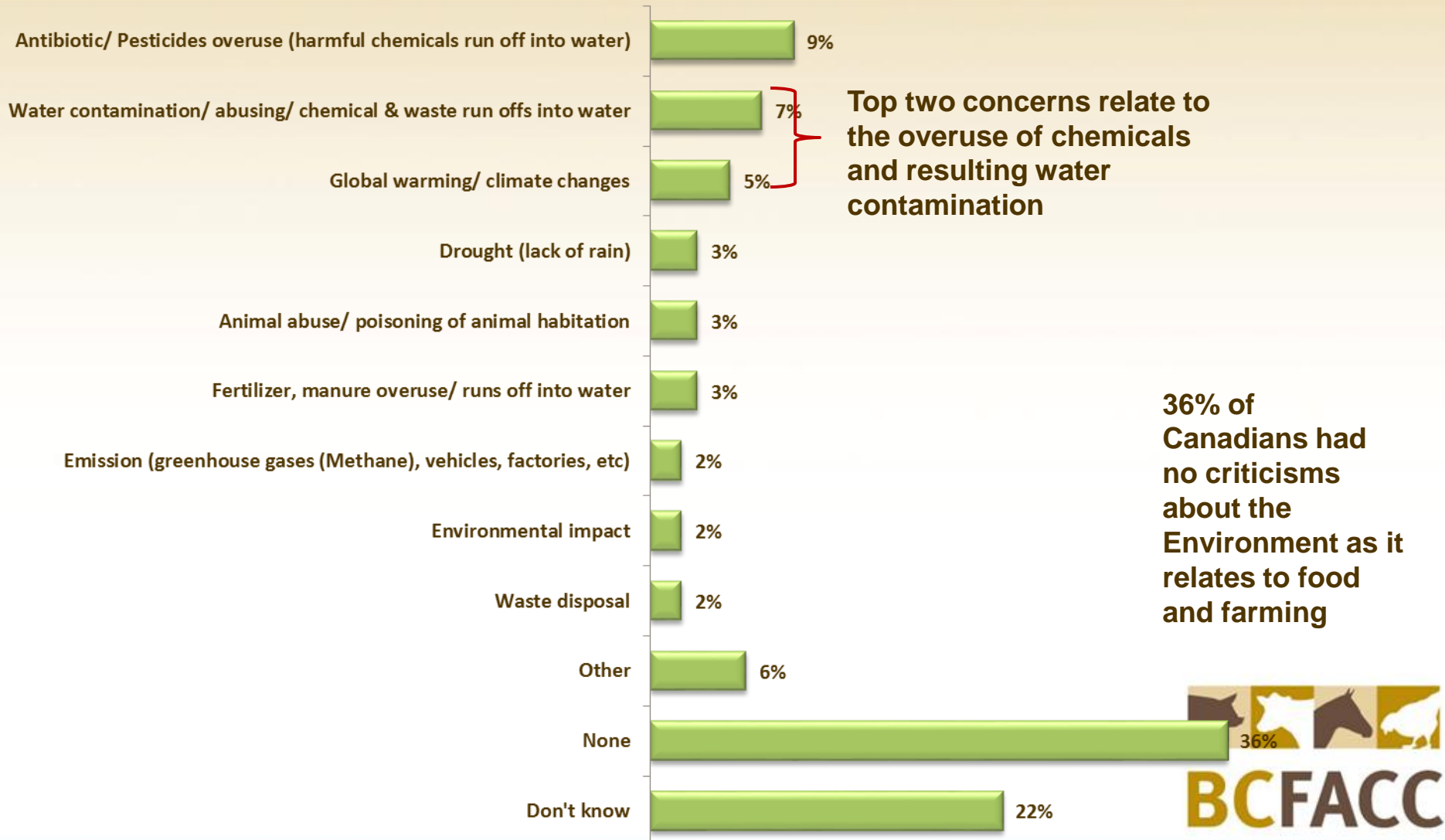


■ Most Important Issue ■ Second Most Important ■ Third Most Important ■ Fourth Most Important ■ Least Important

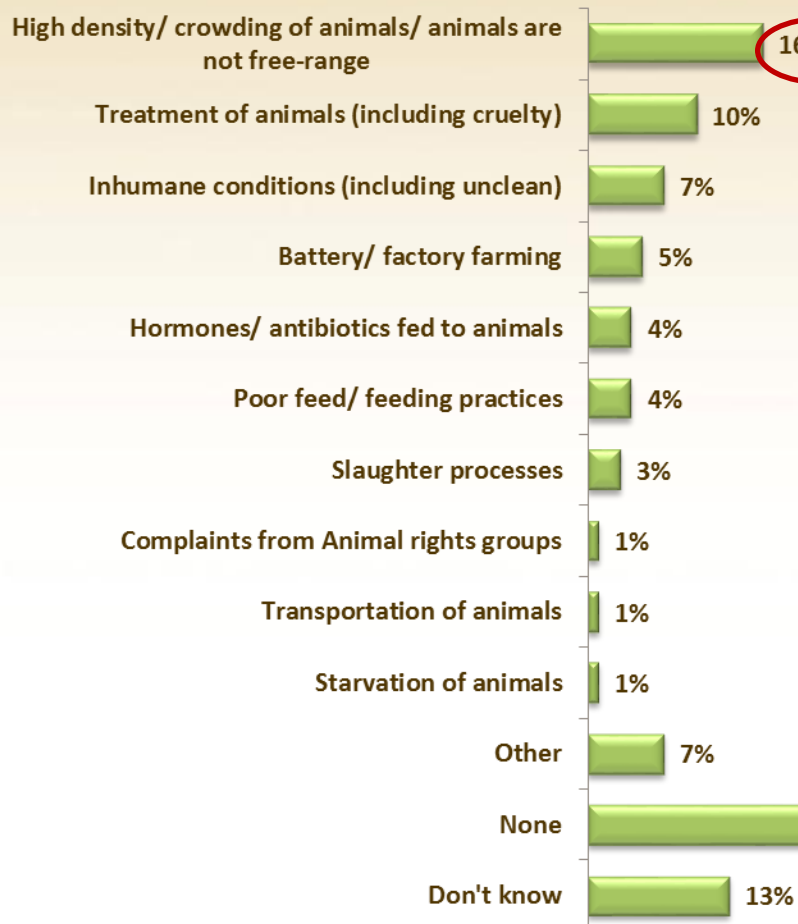


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Unaided Criticisms About The Environment



Unaided Criticisms About Farm Animal Welfare



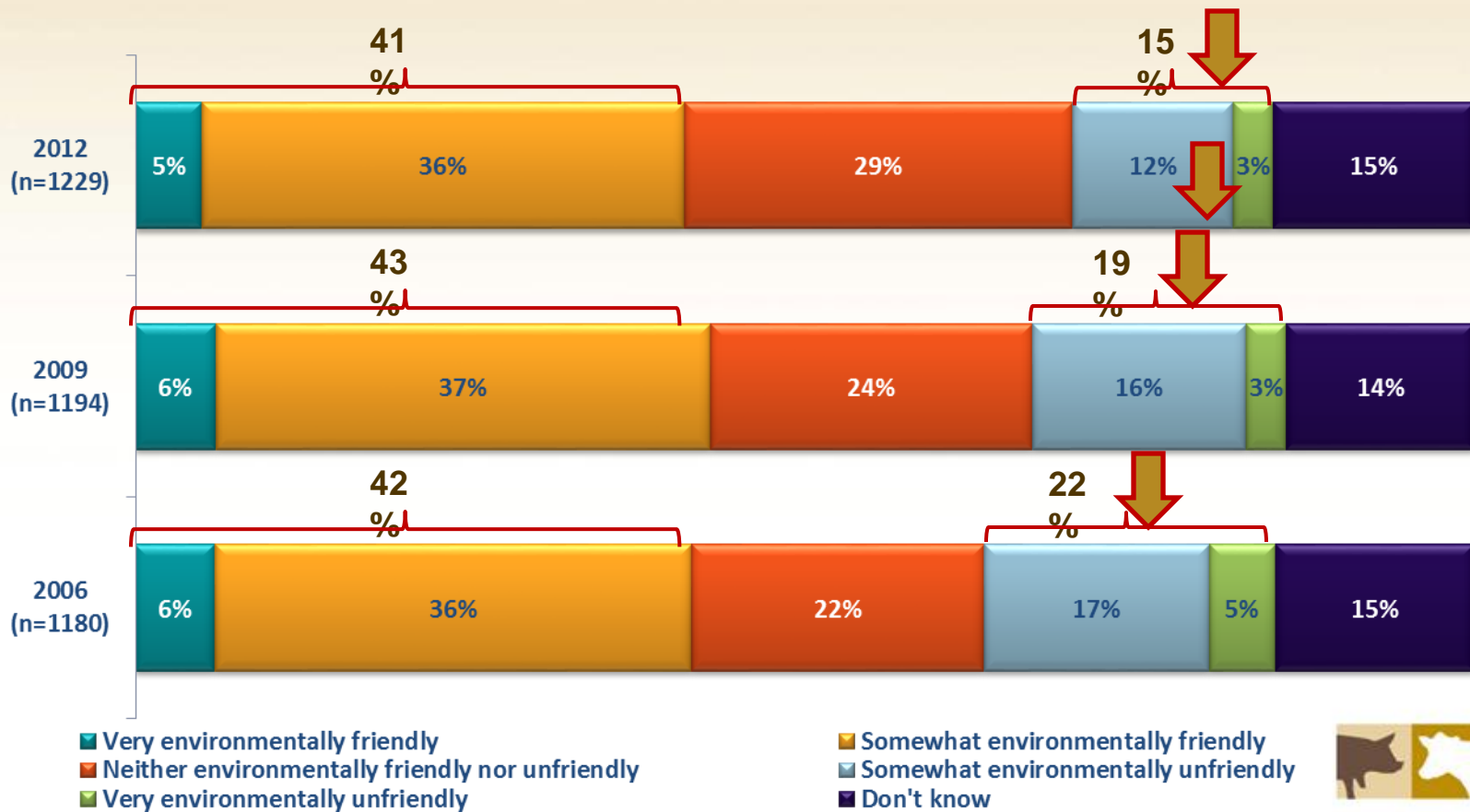
Animal overcrowding and the lack of free range/run is a top criticism mentioned by 16% of Canadians

Almost half of Canadians had no criticisms about farm animal welfare



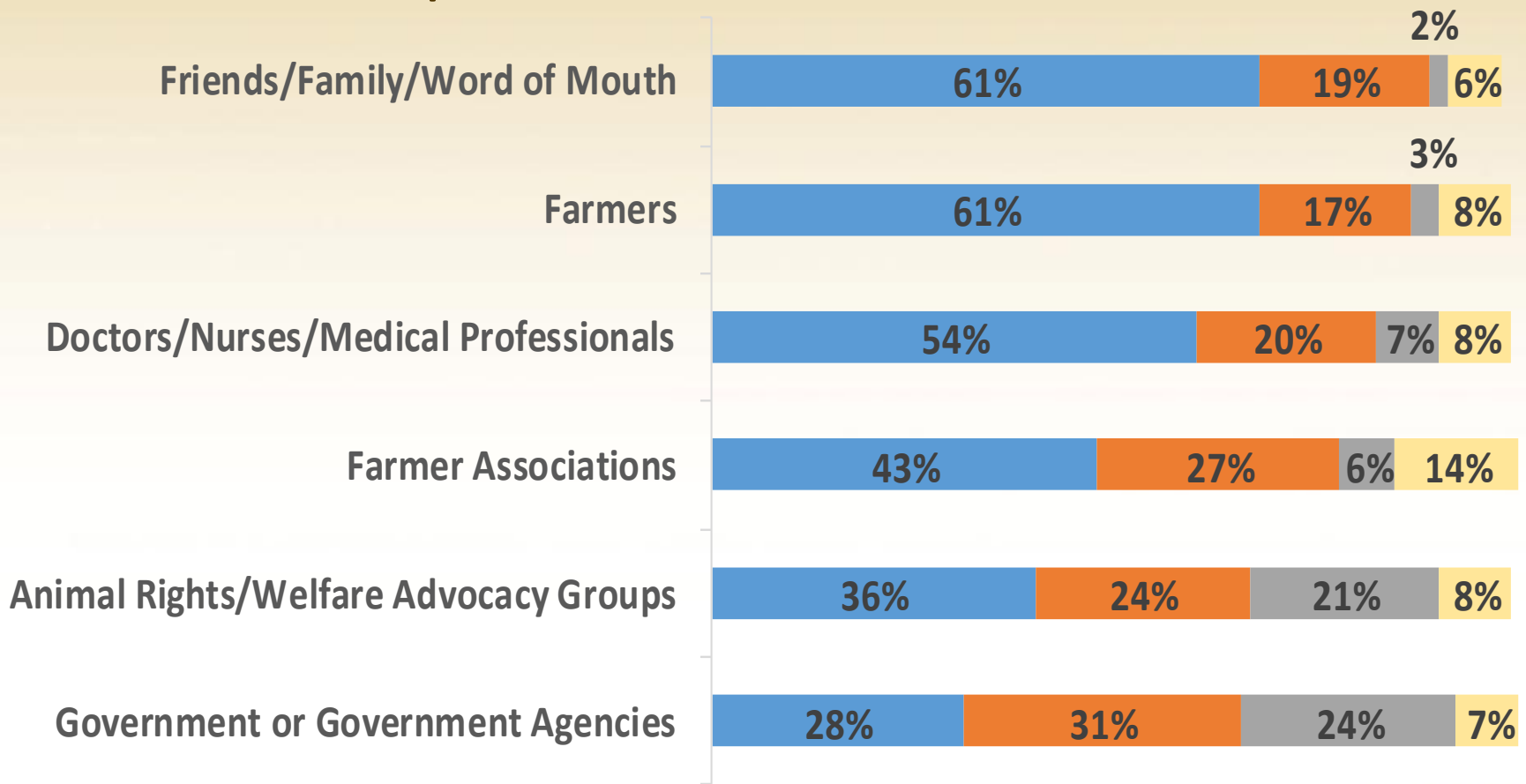
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Environmental Perceptions of Livestock Farming



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Impression Information Sources



■ Very Warm, Favourable
 ■ Neutral
 ■ Very Negative, Unfavourable
 ■ Don't know



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Producers: Attitudes and Practices

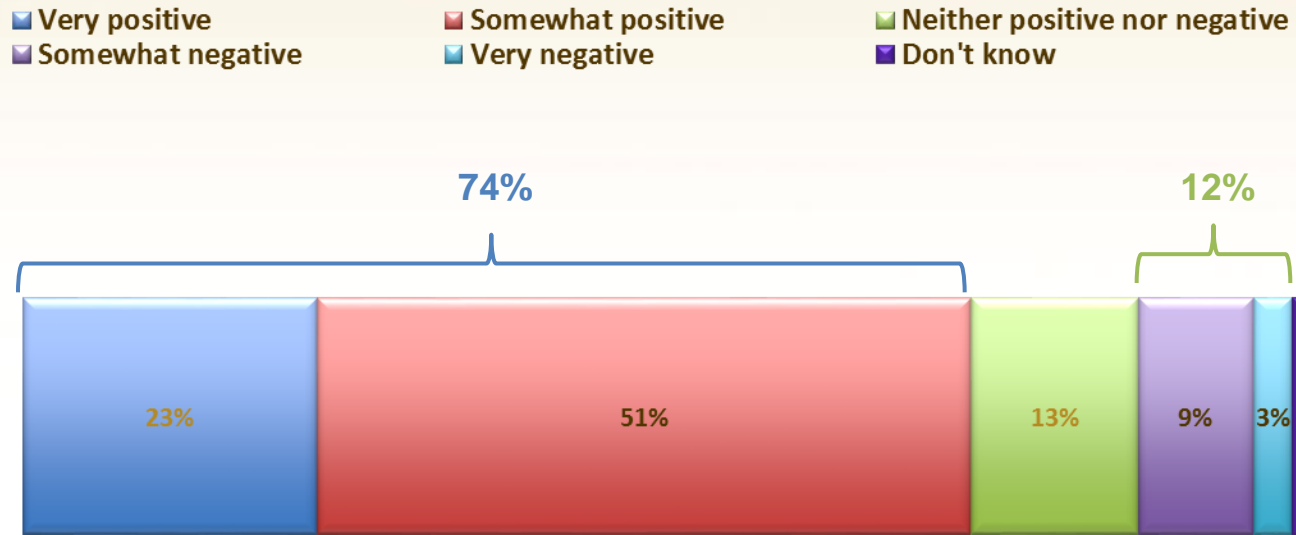


Methodology

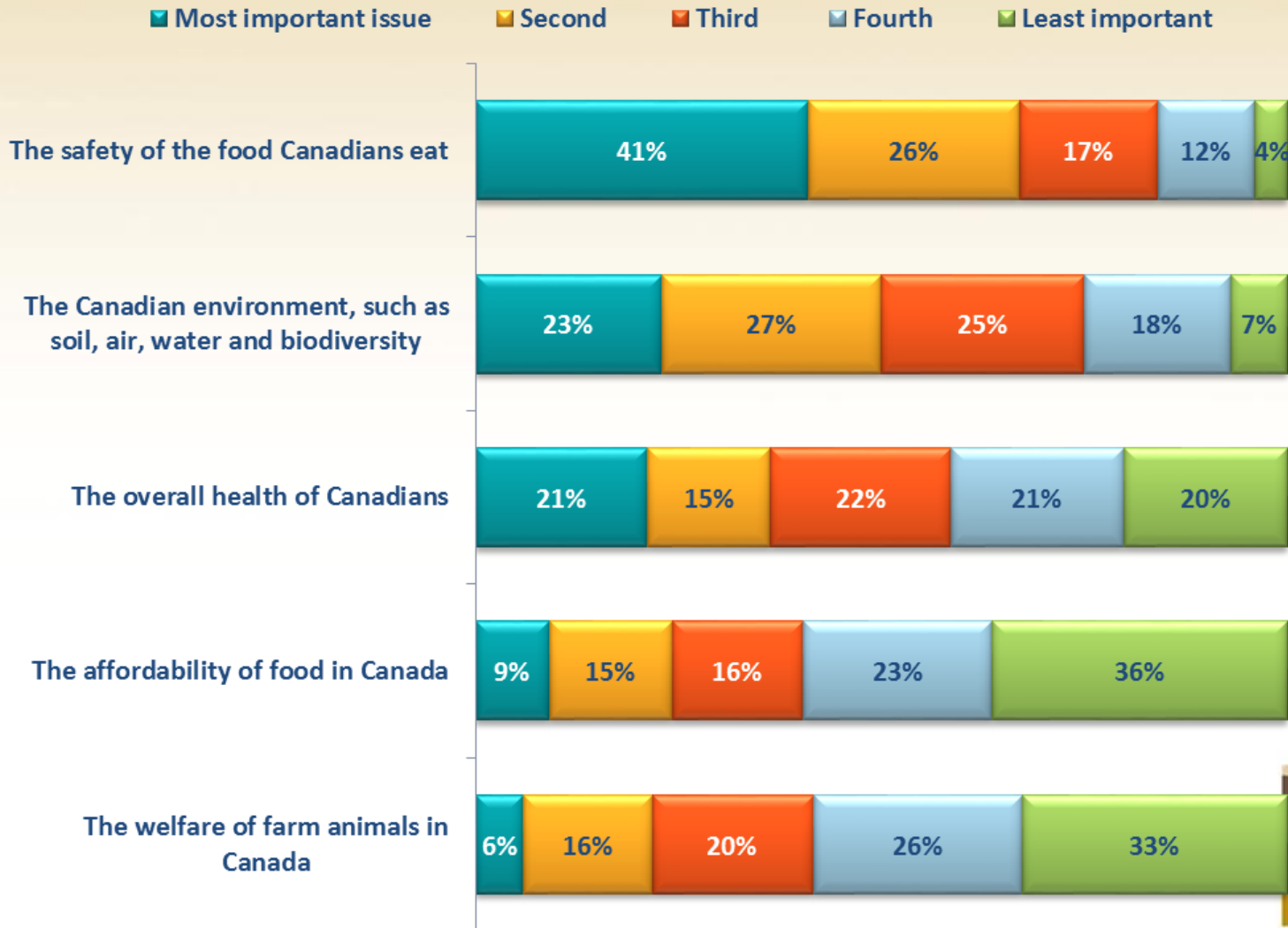
- Six focus groups Ontario in December 2012.
- Quantitative surveys
- 402 surveys completed February-March 2013.
- Data was weighted by main farm type



What would you say is your overall impression of Canadian agriculture today? Would you say your impression is...



5 Pillars of Sustainable Food Production



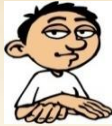
Farmer Associations with Environmental Key Words

- Sustainability
- Environmental Programs
- Environmental Best Farm Practices



Environmental Practices

Frequency of Mentions



At peace/
Normal

- Farmers are comfortable and confident in what they are doing – they stay up to date and adopt practices
- General trust among farmers, doing the best they can for the environment



Curious/Interested



Eager/
Enthusiastic

- There is always something new to learn about
- Farmers are eager to learn new techniques
- Technology and innovation is creating new opportunities



Disappointed



Irritated

- Disappointment is focused on others outside of farming
- Farmers are concerned about where the best practices are coming from
- Farmers are irritated with some of the practices that have
 - been introduced as best farm practices



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Environmental Farm Plan

Across the locations, several farmers within each focus group had participated in the Environmental Farm Plan program.

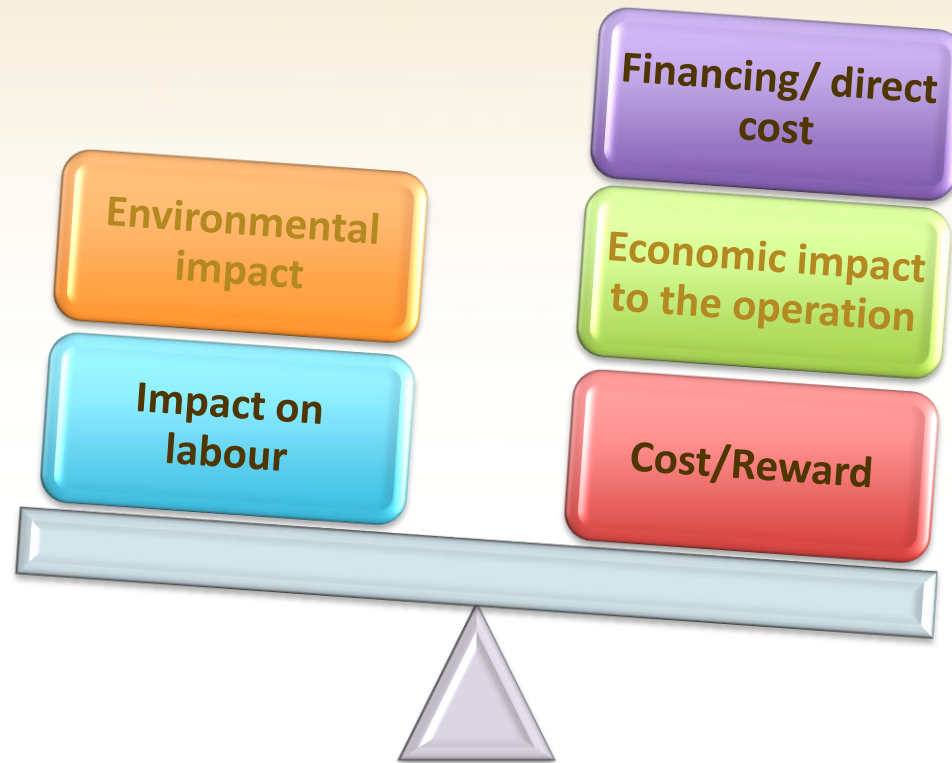
Satisfaction with the EFP Program is High



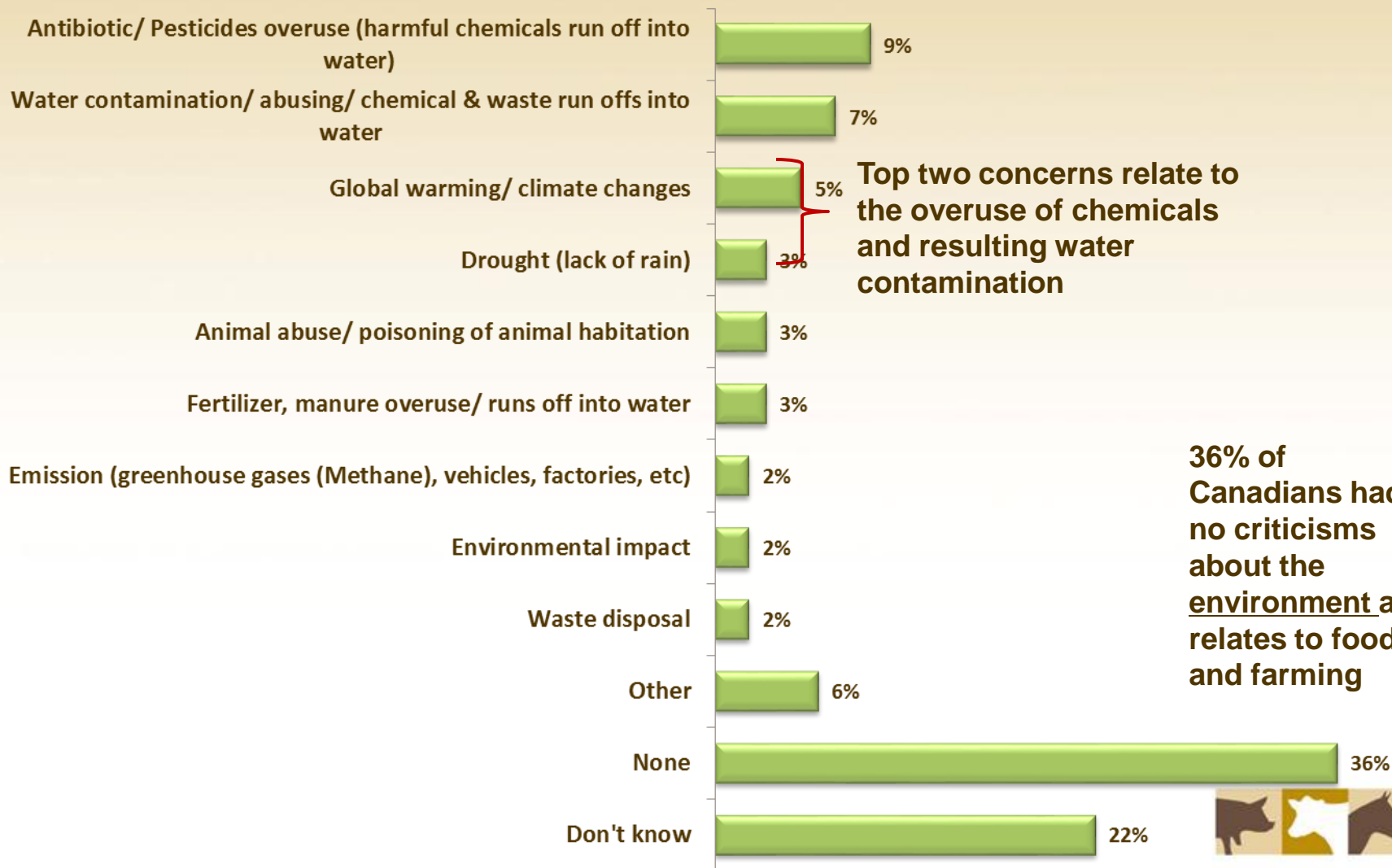
- Generally, those who participated in the EFP program found the experience to be good and feel it had a positive impact on their operation.
- Funding concerns



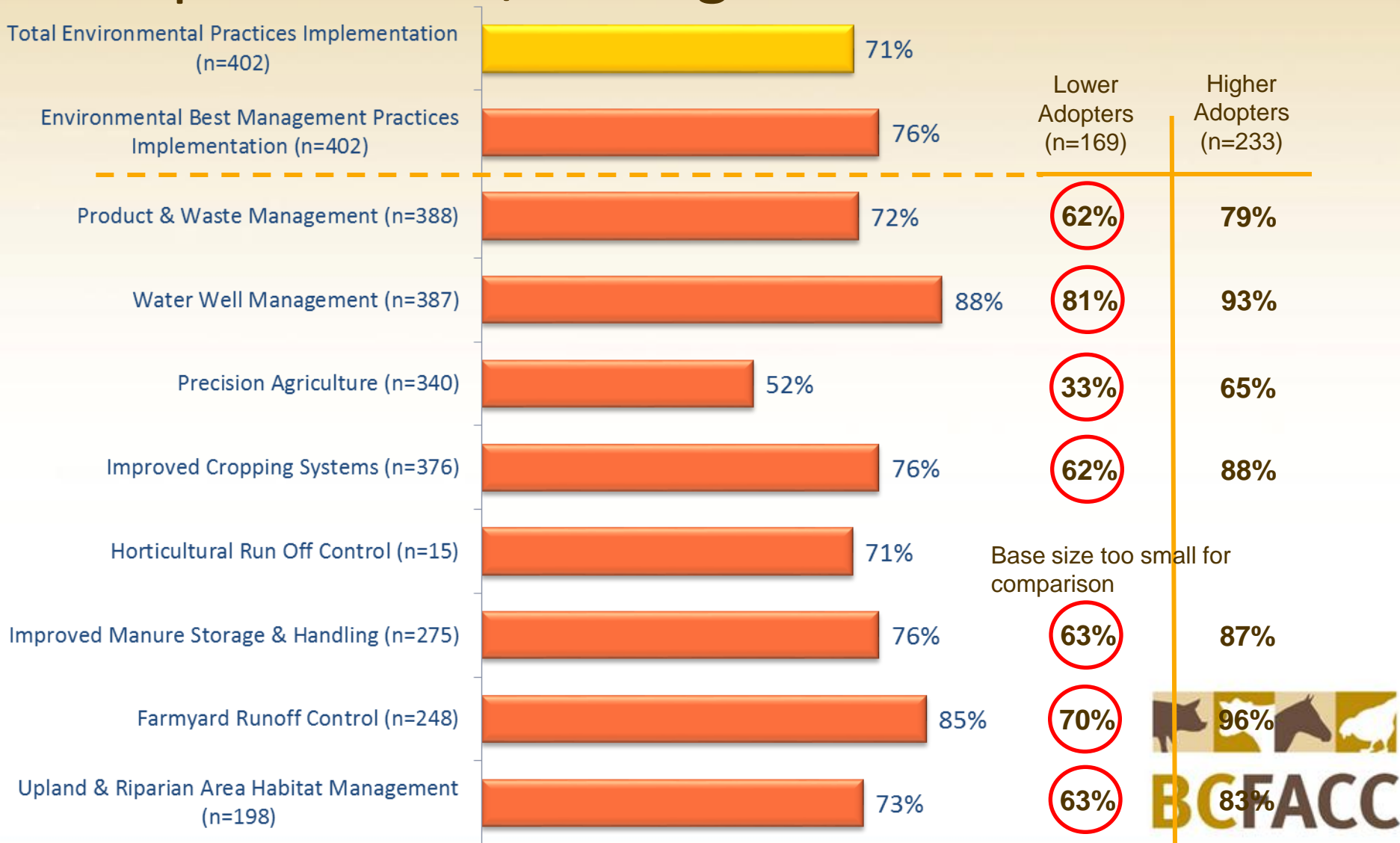
Making Changes to Environmental Best Practices



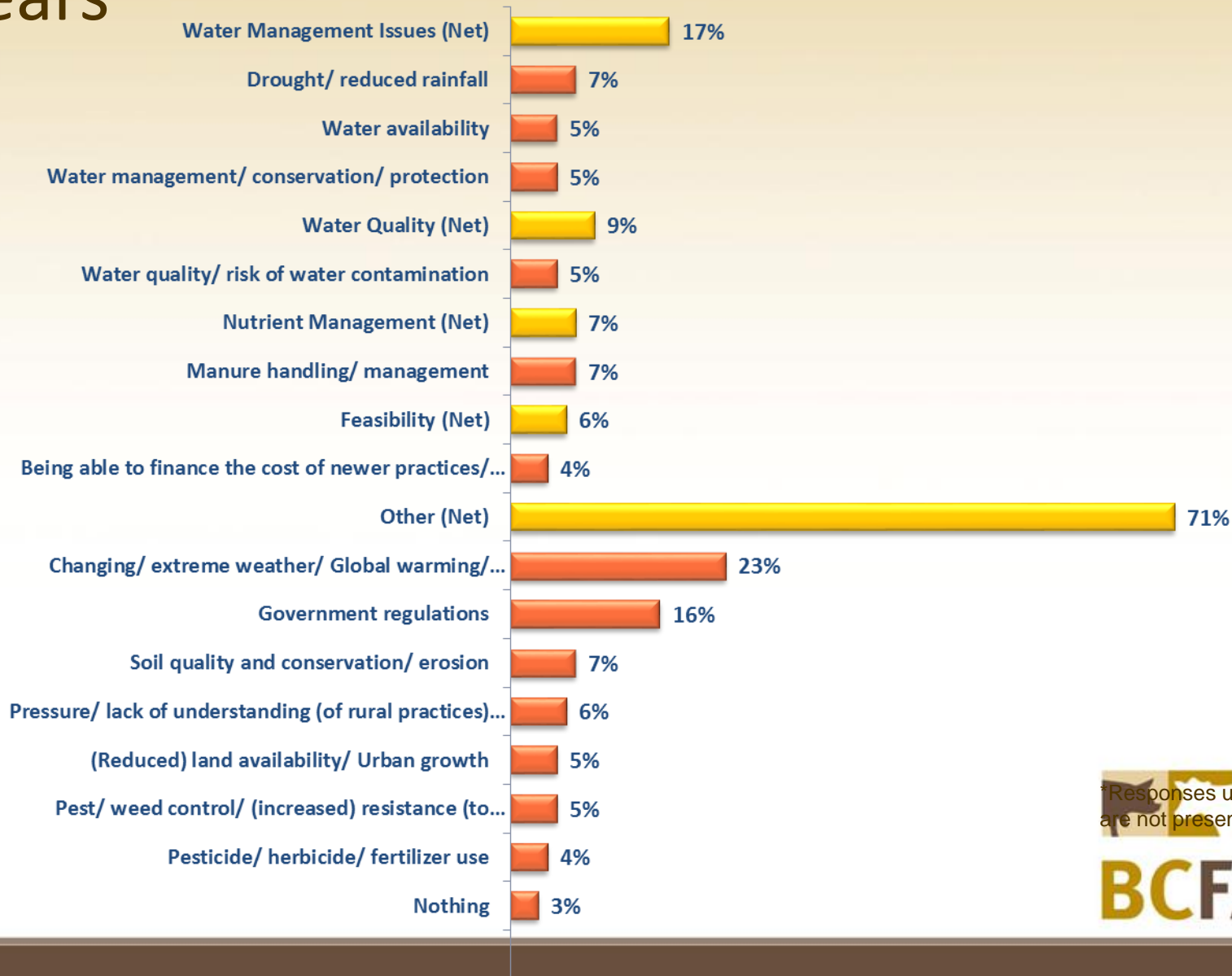
Environmental Criticisms



What's Changed? Environmental Practices Implemented / Changes Made



Looking Forward – Challenges Over Next 5 Years



*Responses under 4% are not presented.

One Message: Farm Environmental Practices



Farmer Associations with Animal Welfare Key Words

- Animal Welfare Best Farm Practices



Animal Welfare Practices (1/2)

Frequency of Mentions



Skeptical

- Farmers are skeptical of where the animal welfare best practices/regulations are coming from.



Worried/
concerned

- Farmers are feeling the increased pressure from animal welfare activist groups and are concerned about the impact on their freedom to operate.



Confused

- Farmers are confused about which practices are 'best'



Proud/
Self-Respect

- Farmers are proud and confident about what they
• are doing on their operation.



Animal Welfare Practices (2/2)

Frequency of Mentions



- Irritated with being told what to do
- Some farmers feel regulations and 'best practices' are created for large producers



- Farmers are curious as to what other farmers are doing in animal welfare



- Similar to proud, farmers are satisfied with how they manage their operations and are confident in their practices.



Farmers Identify Animal Welfare Challenges & Opportunities

Challenges

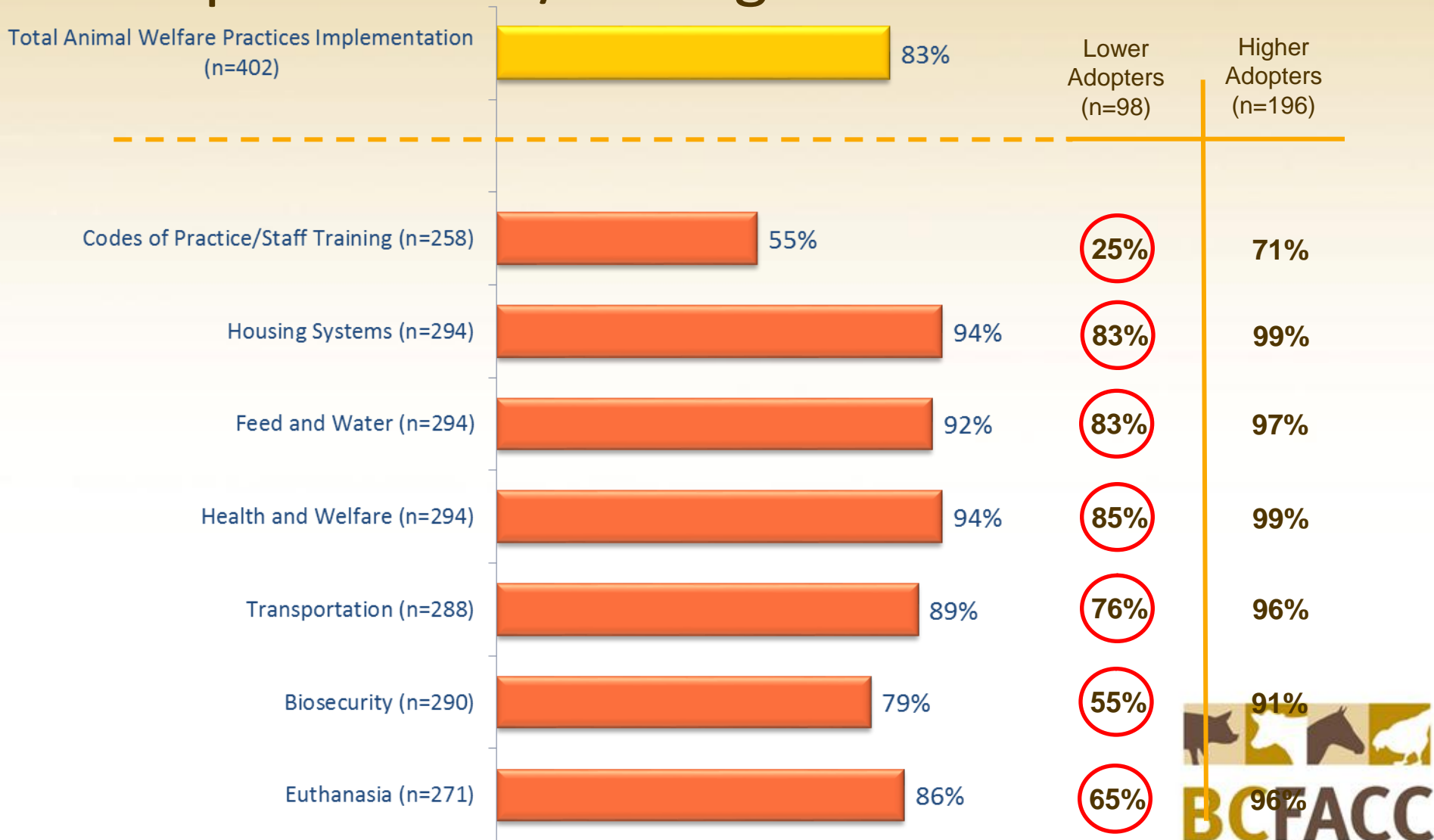
- Third party intervention
- Animal rights groups pressure
- Unrealistic demands from uninformed individuals

Opportunities

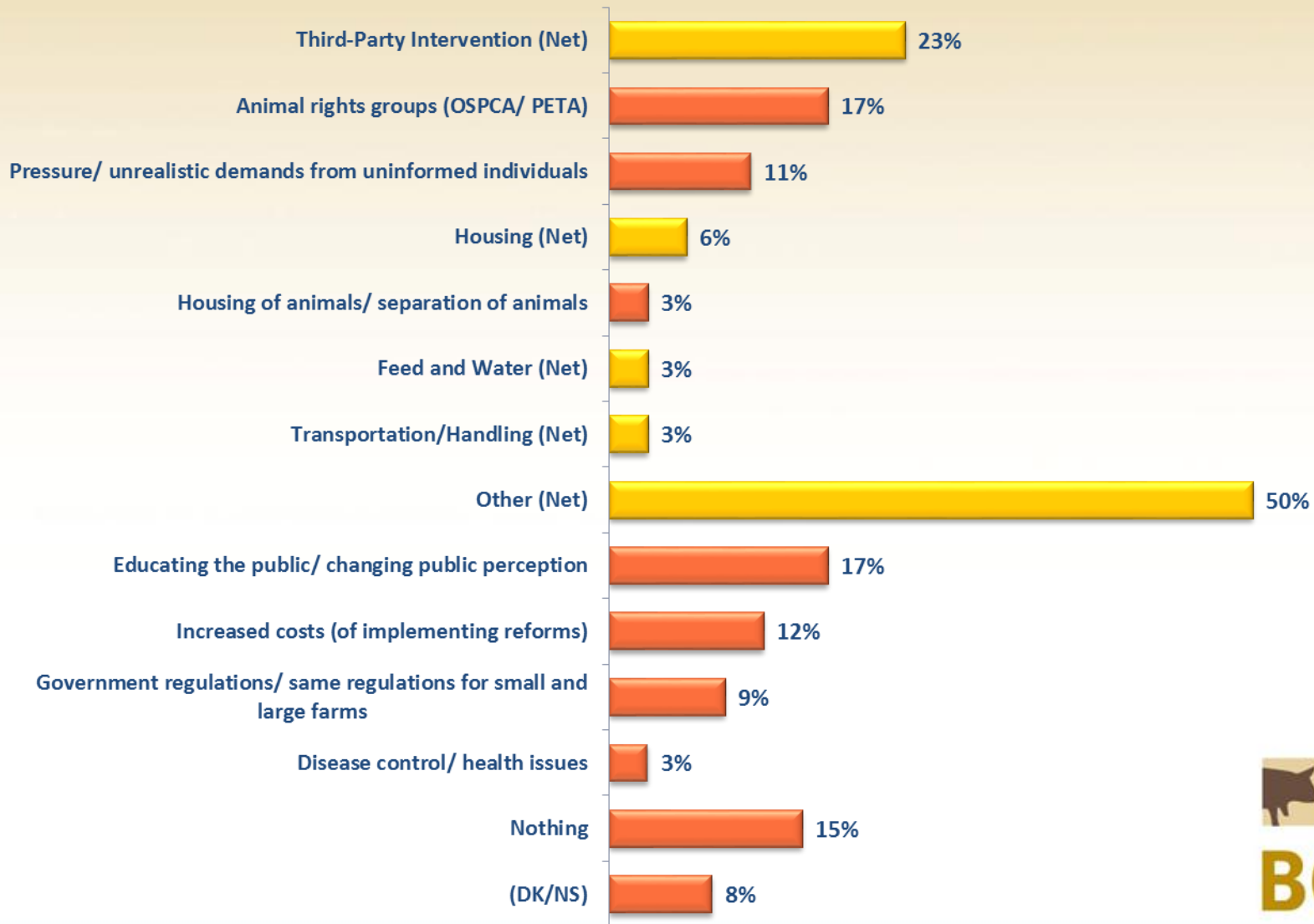
- Improve consumer image
- Public awareness/education
- Transparency/relationship with consumers and showing public farmers care



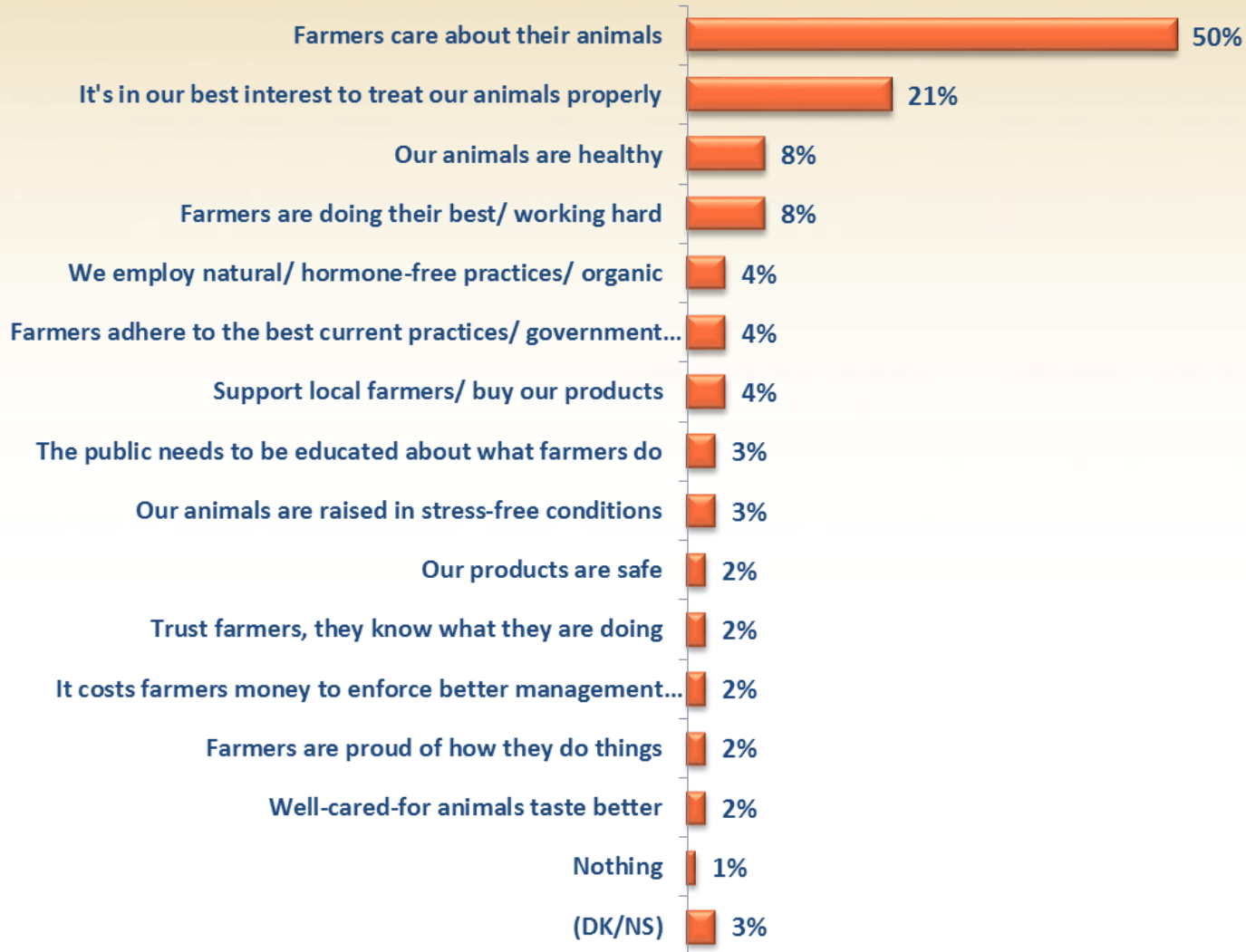
What's Changed? Animal Welfare Practices Implemented / Changes Made



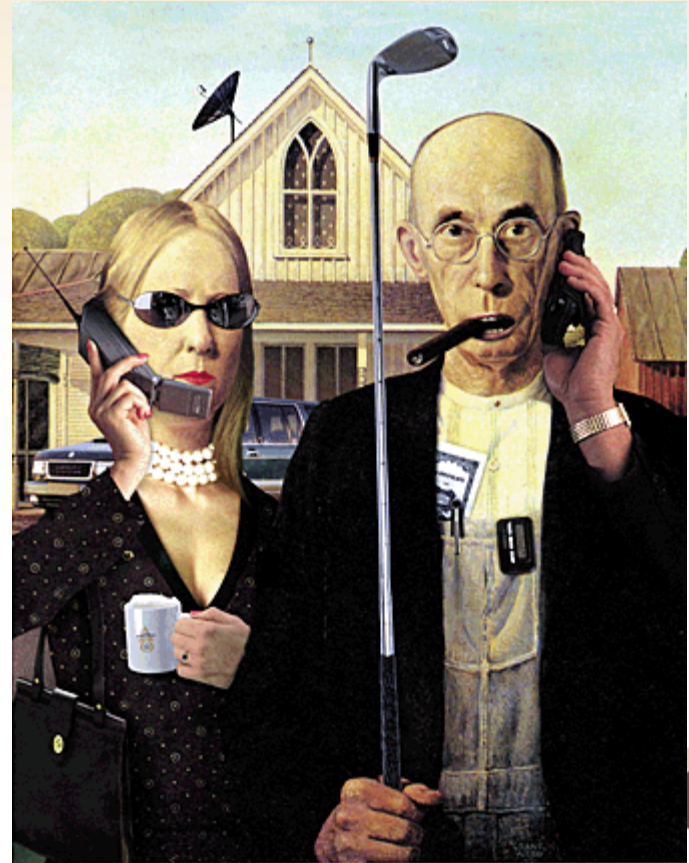
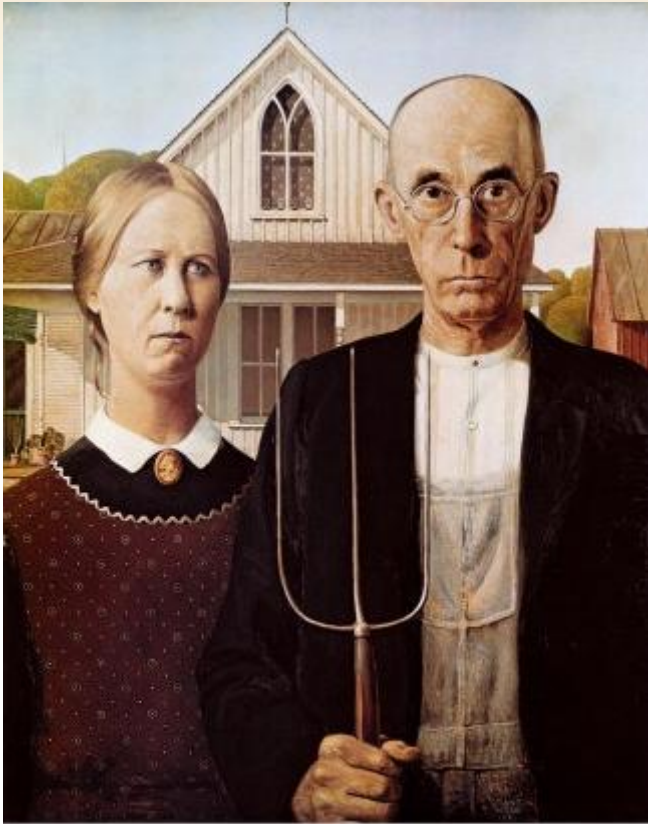
Looking Forward - Challenges Over Next 5 Years



One Message: Animal Care Practices



The Gap



Farmers Want Consumers to Know More!



Farmers believe there is a lack of understanding of what they do for the environment and for animal welfare.



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Top Concerns – Environment

Public

1. Antibiotics and pesticide use
2. Water contamination
3. Global warming/climate change
4. Drought
5. Poisoning of habitat
6. Manure/water run off

Producer

1. Climate
2. Government regulation
3. Water management
4. Water quality
5. Nutrient management/soil quality
6. Lack of understanding of rural practices



Top Concerns – Animal Welfare

Public

1. Density/access to natural environment/containment
2. Treatment of animals
3. “inhumane conditions” in particular cleanliness
4. “Factory farming”
5. Use of hormones

Producer

1. 3rd party intervention
2. Educating public
3. Increase cost of implementing reforms
4. Government regulation



Implications and Recommendations - Environment



Implications and Recommendations – Farming and The Environment

- Increase adoption of environmental best practices
- There are a number of areas for improvement
- Key drivers and barriers to adoption of environmental best practices revolve around:
 - Farmer attitudes
 - Feasibility
 - Awareness and knowledge of best practices



Implications and Recommendations – Farming and The Environment

Farmer Attitudes

- Higher adopters much more concerned about environmental issues
- Lower adopters are not as concerned, and, there are a significant number of practices lower adopters are aware of but have decided not to implement.

Feasibility

- Financial issues are by far the number one threat to success today and in the next 5 years
- Need practical, cost effective on-farm solutions



Implications and Recommendations – Farming and The Environment

Awareness and Knowledge of Best Practices

- Increased awareness (particularly among low adopters)
- Lack of familiarity with many of the resources



Implications and Recommendations – Farming and The Environment

Recommendations

- Increase awareness and knowledge of environmental best practices
- Increase awareness of, familiarity with, and, availability of resources for environmental farm stewardship practices
- Improve feasibility of adoption via increased funding/financial incentives
- Increase research to identify practical, cost effective solutions to environmental problems on the farm.
- Enhance public image of farmers



Implications and Recommendations - Animal Care



Implications and Recommendations – Animal Care

- Adoption of animal care best practices is high (83%).
- There is room for improvement in a number of areas
- Key drivers and barriers to adoption of animal care best practices revolve around:
 - Farmer attitudes
 - Feasibility
 - Awareness and knowledge of best practices
 - Public image



Implications and Recommendations – Animal Care

Farmer Attitudes

- Animal care issues are a bigger threat to success to livestock farmers than environmental issues.
- Higher adopters of animal care best practices are much more concerned about animal care
- In contrast, lower adopters are not as concerned about animal care issues
- Both have strong belief amongst farmers that they must take more personal responsibility for ensuring animal welfare



Implications and Recommendations – Animal Care

Feasibility

- Feasibility currently not as big of a driver of adoption of animal care best practices
- Lower adopters said increased costs (of implementing animal care reforms), and, government regulations will be their biggest challenge over the next 5 years
- Want more research to identify practical, cost-effective animal care solutions



Implications and Recommendations – Animal Care

Awareness and Knowledge of Best Practices

- Low adopters unaware of best practices
- Expressed a need for more information on best practices
- Lack of familiarity with many of the resources available for animal
- Need to improve the awareness and availability of existing



Implications and Recommendations – Animal Care

Public Image

- Animal rights groups activism and continued agitation
- Public misperceptions/misunderstanding
- Need to educate public to help change public perception
- Significant need and opportunity to improve image among



Implications and Recommendations – Animal Care

Recommendations

- Increase awareness and knowledge of animal care best practices
- Improve feasibility of adoption via increased funding/financial incentives
- Identify practical, cost effective solutions to animal care on the farm
- Practical, cost effective solutions to encourage adoption
- Increase awareness of resources for animal welfare practices
- Continue to enhance public image of farmers relative to commitment to animal care best practices.



Thank you!



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