Ipsos Reid Public Affairs

Report for:
INVESTMENT AGRICULTURE FOUNDATION OF BC

Poll of Public Opinions Toward Agriculture, Food and Agri-Food Production in BC

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BACKGROUND AND METHODOLOGY

This report presents the findings of a survey research study conducted by Ipsos Reid Public Affairs on behalf of the Investment Agricultural Foundation of British Columbia. The main purpose of this research is to gauge public awareness and opinions about issues facing the agriculture, food and agri-food production industries in BC, and compare the results against a poll conducted in 2004. The survey findings will be used to enable industry to develop strategic approaches to better connect to the public and will also be used as a baseline for future polling.

Funding for this research was provided by the Investment Agriculture Foundation of BC. The Foundation manages and distributes federal and provincial funds in support of innovative projects for the benefit of BC's agriculture and agri-food industries. Additional input into the survey design was provided by the BC Agriculture Council and the BC Food Processors' Association.

Context

Agriculture is a significant industry in British Columbia with more than 297,000 people employed on farms, ranches and orchards, and in greenhouses, nurseries, veterinary offices, hatcheries, grooming and other agricultural-related services. Total agriculture sales in BC reached $2.3 billion in 2006 and provides employment for approximately 34,700 people. The BC food and beverage processing industry generates $6.6 billion in sales and provides an estimated 26,900 jobs.

Climatic conditions in the province make it possible for British Columbia farmers to grow a wide variety of crops. The agriculture and processing sectors are very diverse with more than 240 commodities being produced in agriculture. The diversity provides a strong base for providing opportunities for adding value and new markets. However, diversity is a significant constraint for bridging differences and addressing common needs.

The Investment Agriculture Foundation has significant financial resources to help the agriculture and food processing sectors adapt and grow in accordance with the terms of its various trust and funding agreements.

Issues Occurring Near Time of Survey Fielding

Listeriosis Outbreak – An outbreak of listeriosis linked to a food processing plant in Toronto caused several deaths across Canada. Media coverage of the story peaked from mid August to early September.

Mushroom Farm Deaths – Three men died and two others were severely brain-damaged by lethal gases at a Langley mushroom farm on September 5th. This incident followed a March 2007 freeway crash near Abbotsford that killed three farm workers and injured fourteen others.

Survey Methodology

A total of 1,142 interviews were completed between September 29 and October 11, 2008. A survey of this size has a margin of error of 2.9%, 95 times out of 100. The margin of error will be larger for survey sub-groups.

Interviews were conducted by a combination of telephone (n=500) and online (n=642) data collection methodologies. The telephone interviews used a traditional Random Digit Dialling (RDD) sampling procedure, while the online interviews were conducted with randomly selected members of Ipsos Reid's household panel (20,000+ members in BC). The results for both sets of data have been weighted to reflect actual region, age and gender distribution of BC population according to 2006 Census.

The main reason for using both data collection techniques was to allow for direct comparison to the 2004 survey which was conducted by telephone, as well as to future surveys that are anticipated to be conducted using an online methodology.

The number of interviews by region was as follows:

- Lower Mainland (n=466)
- Vancouver Island (n=238)
- Southern Interior (n=232)
- North (n=206)

Online vs. Telephone Results

The online and telephone surveys had some significant differences due to a much higher level of "don't know" responses in the online survey. The higher level of "don't know" responses is a by product of the "don't know" option always being visible to respondents on an online survey. In contrast, the "don't know" option is not typically read to respondents in a telephone survey, even though the option is always available to respondents if they volunteer that response.

In this poll, the level of "don't know" responses in the online survey was likely increased by the low level of respondent familiarity with the subject matter (i.e. agriculture).

In order to combine the results of the two surveys (rather than presenting two separate sets of results), both sets of data were recast excluding the "don't know" responses. This means that all responses in this report are based on "those with an opinion" (i.e. excluding "don't knows").

This change was very successful at aligning the two sets of data. The results for the "don't know" responses are still reported for each question (referred to as Online DK and Telephone DK).

The 2004 results have also been rebased excluding the "don't know" responses.

Note on Rounding Error

Please note that some “Totals” in this report may seem off due to rounding. For example, 35% and 24% might be shown to add to 60% (not 59%). With decimals, the component percentages might actually be 35.4% (rounds down to 35%) and 24.2% (rounds down to 24%), making the true total 59.6%, which rounds up to 60%. All percentages shown are correct.

KEY POINT SUMMARY

Most of the results in this survey are consistent with the 2004 survey. However, there are a number of areas where there has been a notable shift in public opinion.

- **Increase in Importance of Food Self-Sufficiency** – Nine-in-ten (91%) residents agree that *"it is important that BC produce enough food so we don't have to depend on imports from other places."* This is an increase of 8 points from the 2004 survey.
- **Increased Concern Over Farm Workers** - More than three-quarters (77%) of British Columbians agree *"I am concerned that some farm workers are exploited in BC."* Concern about farm workers has increased by 9 points from the 2004 survey.
- **Increased Acceptance of Differing Labelling Requirements for Imported Foods** - While a majority of British Columbians believe that imported foods should meet the same labelling requirements as local foods, the size of the majority has been reduced from the 2004 survey. Two-thirds (65%) now say that differing requirements for imported foods are unfair, down 13 points from the 2004 survey.

The higher level of "don't know" responses in the online survey compared to the telephone survey suggests that some or perhaps many responses to the current and past telephone surveys are based on perceptions or best guesses. This finding is corroborated by the current survey result showing that three-quarters (74%) of British Columbians rate themselves as knowing "not very much" or "little" about farming in BC.

While most British Columbians (84%) think the agriculture industry in BC is in either "good" (39%) or "fair" (45%) shape, this positive outlook does not extend to individual farmers. Fewer than four-in-ten British Columbians agree that *"BC farmers receive a fair share of the money made on the foods they produce"* (37%) or that *"farmers are doing pretty well financially"* (35%).

The ratings for food processors are strong throughout the survey. British Columbians are confident that food products processed in BC are safe (85%). They believe that food processors operate in an environmentally responsible manner (77%) and they say they find it easy to find a wide variety of food products processed in BC (64%).

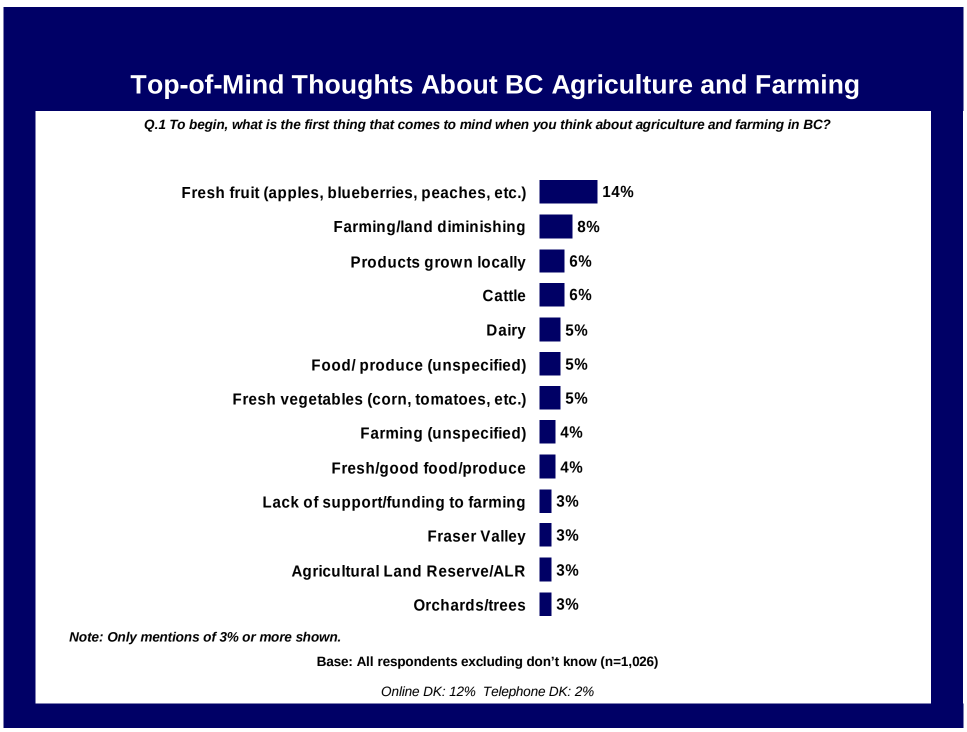
There is continuing strong support for the Agricultural Land Reserve (ALR) and the policy of preserving farm land (95%). However, this support is based on a low level of public knowledge about the ALR. Only about four-in-ten (41%) residents say they know either "a lot" (13%) or "some" (28%) about the ALR.

DETAILED FINDINGS

Perceptions of Farming and Agriculture

Top-of-Mind Thoughts about BC Agriculture and Farming

The subject of agriculture and farming brings many different things to mind for British Columbians, with no single association dominating the responses. On a top of mind basis, British Columbians are most likely to associate agriculture and farming in their province with "fresh fruit" (14%), "diminishing farmland" (8%), "locally grown products" (6%) and "cattle" (6%). These results exclude the 12% of online respondents and 2% of telephone respondents who provided no response to this question.



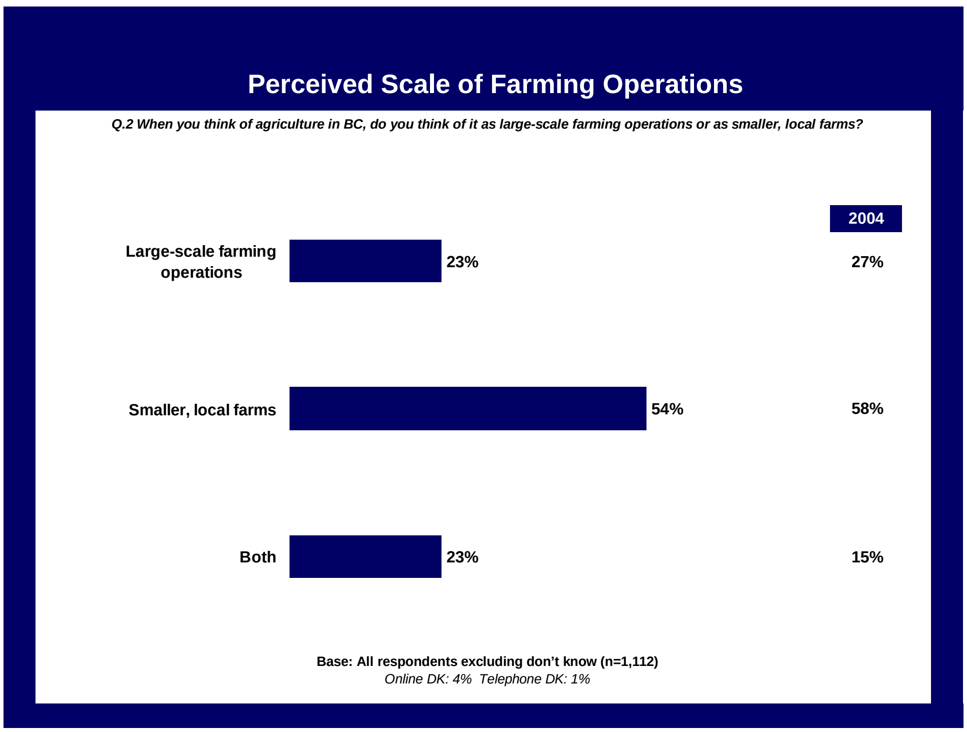
Notable Differences

- Northern residents are much more likely than residents of any other region to mention "cattle" (16% vs. 6% overall).

Perceived Scale of Farming Operations

By a sizable margin, British Columbians are more likely to think of agriculture in BC as "smaller local farms" (54%) than as "large-scale farming operations" (23%). Nearly one-quarter (23%) of residents think of agriculture as being both smaller local farms and large-scale farming operations. These results exclude the 4% of online respondents and 1% of telephone respondents who said "don't know" to this question.

These results are consistent with the 2004 survey.



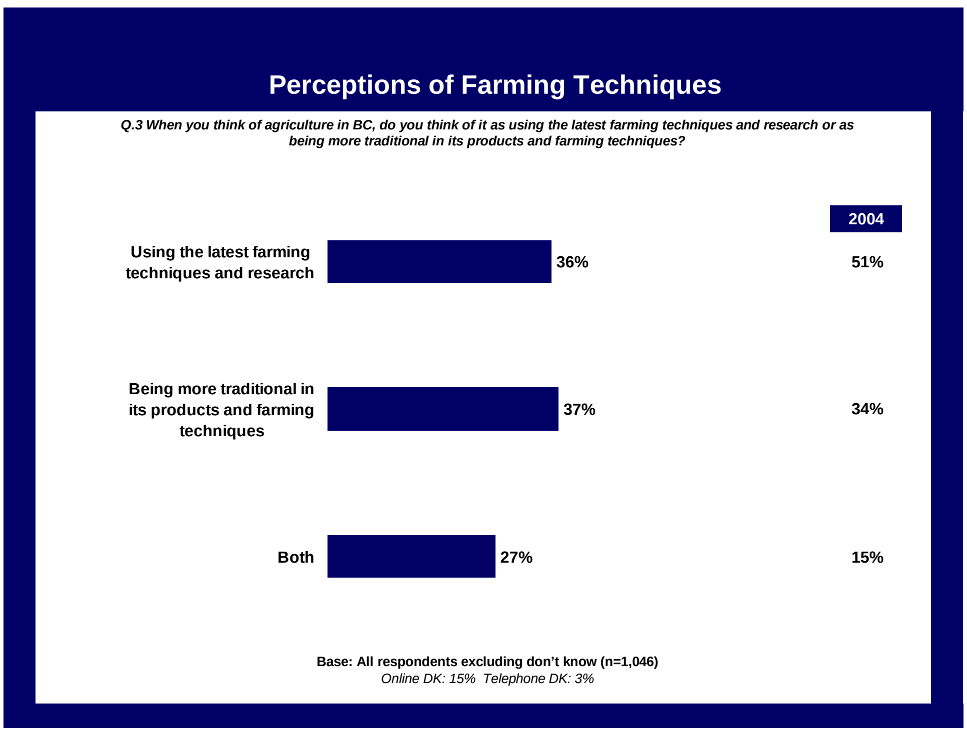
Notable Differences

- Residents of rural communities are much more likely than residents of cities, suburbs and towns to associate BC agriculture with "smaller local farms" (67% vs. 54% overall).

Perceptions of Farming Techniques

British Columbians are split in their views of whether BC agriculture uses the latest farming techniques or more traditional techniques. Nearly four-in-ten (37%) say they think of agriculture in BC as "being more traditional in its products and farming techniques", while a nearly identical proportion (36%) think of BC agriculture as "using the latest farming techniques and research". Slightly more than one-quarter (27%) of residents think of it as being associated with both modern and traditional techniques. These results exclude the 15% of online respondents and 3% of telephone respondents who said "don't know" to this question.

These results show a shift from the 2004 survey, when a slight majority of residents (51%, 15 points higher than today) perceived BC agriculture as "using the latest farming techniques and research".



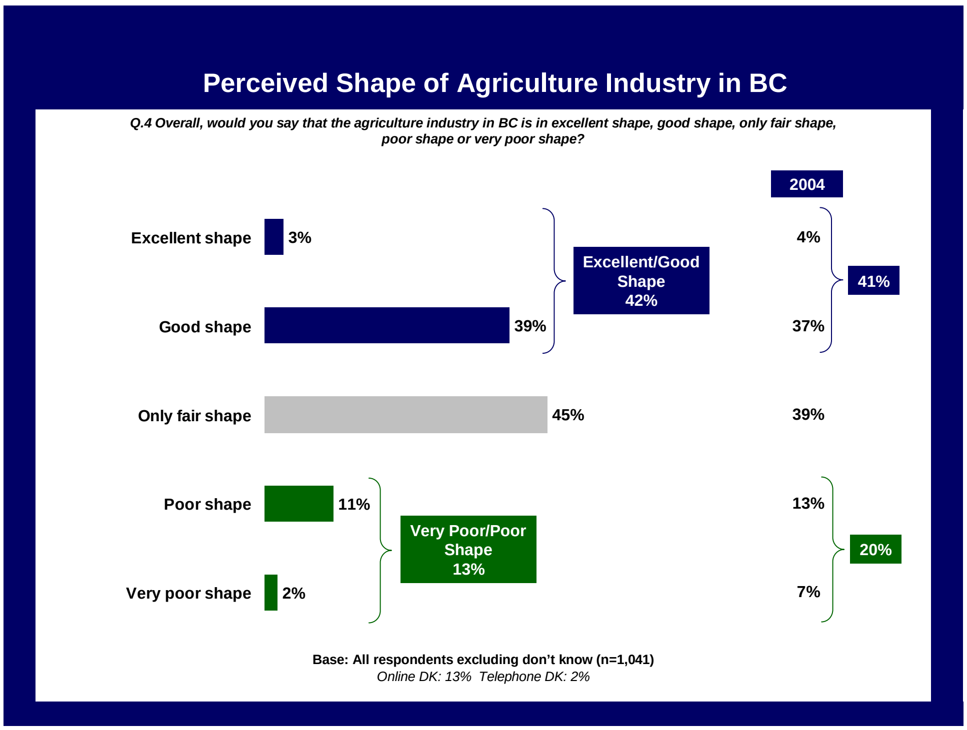
Notable Differences

- Residents of rural communities are much more likely than residents of cities, suburbs and towns to associate BC agriculture with "being more traditional in its products and farming techniques" (48% vs. 37% overall).

Perceived Shape of Agriculture Industry in BC

Most British Columbians think the agriculture industry in BC is in either "good" (39%) or "only fair shape" (45%). Far fewer residents say that the agriculture industry is in "excellent shape" (3%) or "poor shape" (13%, including 2% "very poor" and 11% "poor"). These results exclude the 13% of online respondents and 2% of telephone respondents who said "don't know" to this question.

Overall, these results are a slight improvement from the 2004 survey. While four-in-ten British Columbians continue to view the industry as "excellent" or "good" (42% vs. 41% in 2004), the proportion rating the industry as "poor" ("very poor" or "poor") has fallen by 7 points from 2004 (13% vs. 20% in 2004). The decline in poor ratings has been offset by a 6 point rise in "only fair shape" ratings (45% vs. 39% in 2004).

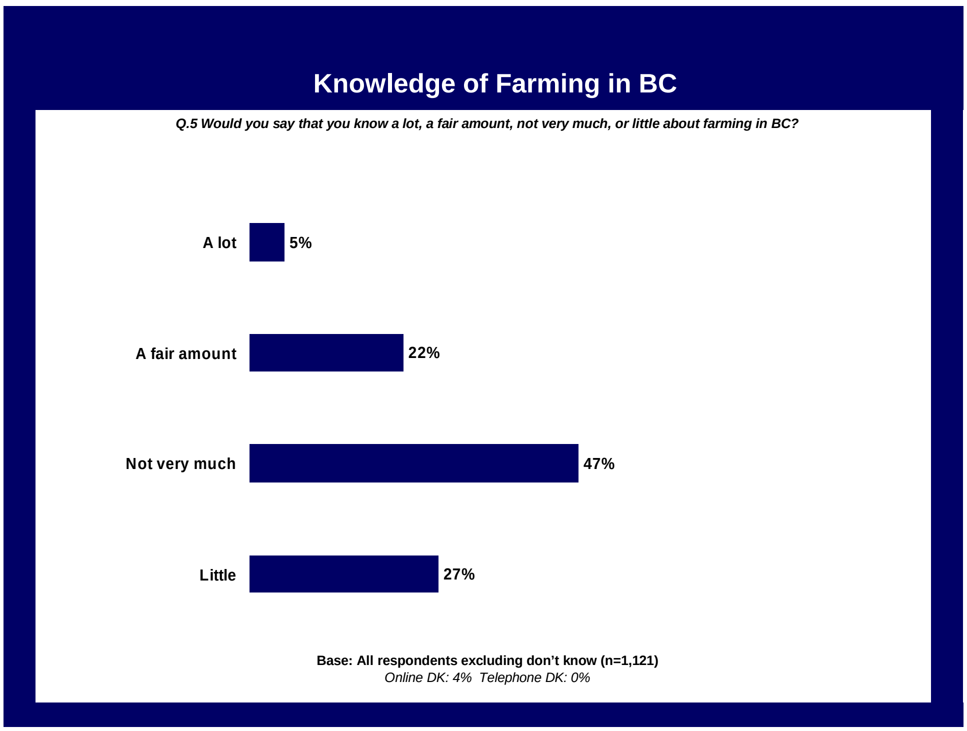


Notable Differences

- Perceptions of the shape of the agriculture industry are most positive in the Lower Mainland (45% "excellent" or "good") and on Vancouver Island (43%). They are much *less* positive in the North (29% "excellent" or "good") and somewhat less positive in the Southern Interior (36%).

Knowledge of Farming in BC

A very important caveat in interpreting results in this survey is that many responses are likely based merely on perceptions or best guesses rather than concrete knowledge. In fact, only about one-quarter (26%) of British Columbians say they know either “a lot” (5%) or “a fair amount” (22%) about farming in BC. Most British Columbians (74%) report that they either know “not very much” (47%) or “little” (27%) about farming in BC. These results exclude the 4% of online respondents and 0% of telephone respondents who said “don’t know” to this question.



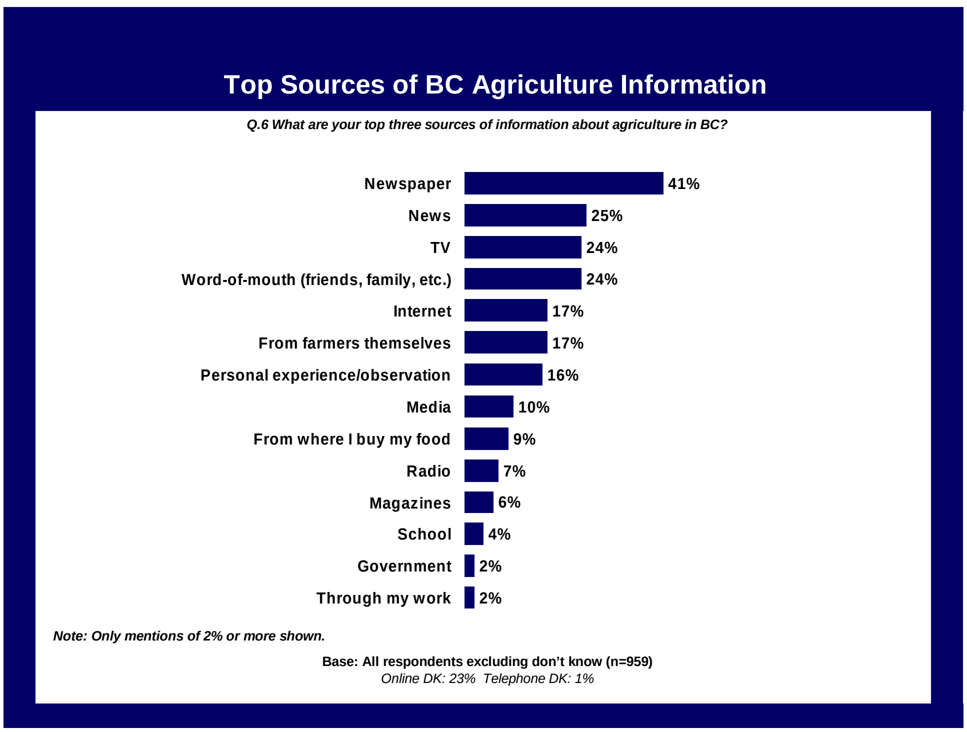
Notable Differences

- Knowledge of farming in BC is much higher among some demographic groups. Groups more likely to say that they know “a lot” or “a fair amount” include residents in households where someone works in the industry (54% “a lot” or “a fair amount”), residents of rural communities (46%), and residents of the Southern Interior (40%) and North (32%) as compared to residents of Vancouver Island (24%) and the Lower Mainland (22%).

Top Sources of BC Agriculture Information

British Columbians tend to get their information about agriculture in BC from more indirect sources such as the media than from primary sources such as farmers or their friends. Asked to provide up to three sources of information, the three most cited sources are all media related including “newspapers” (41%), the “news” (25%) and television (24%).

Behind these media sources are more direct channels such as “word of mouth (family, friends)” (24%), “farmers themselves” (17%) and “personal experience/observation” (16%). Also high on the list (5th spot) is the Internet (17%). These results exclude the 23% of online respondents and 1% of telephone respondents who said “don’t know” to this question.



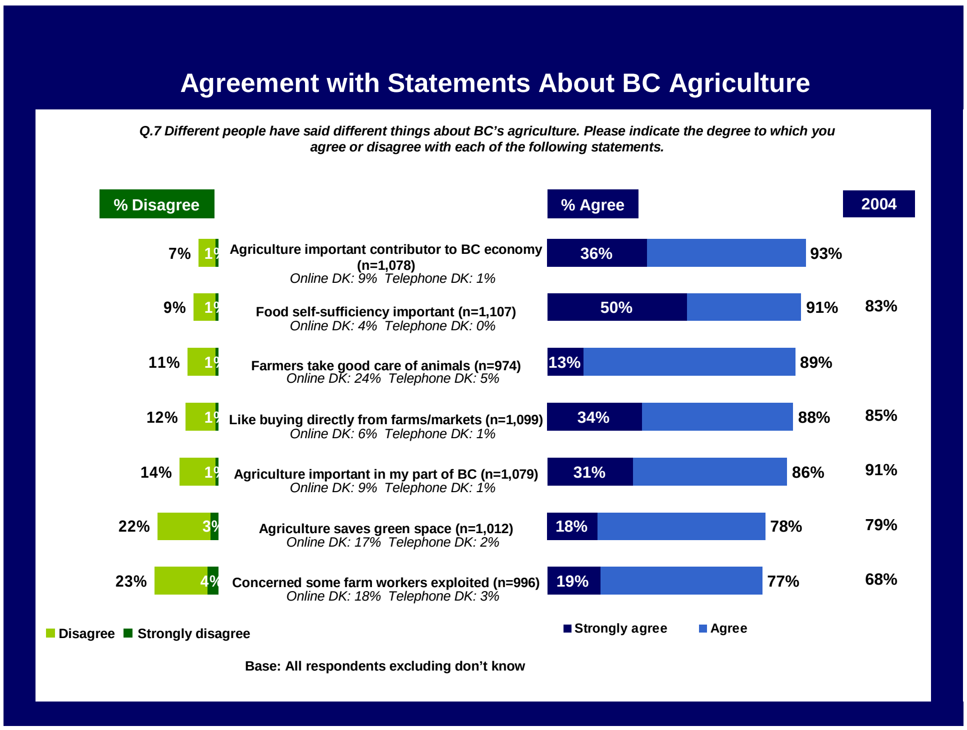
Notable Differences

- None

Attitudes Towards Farming, Agriculture and Processing

Agreement with Statements about BC Agriculture

Survey respondents were asked to agree or disagree with a battery of fourteen statements about agriculture in BC. The results for the 7 statements with the highest levels of agreement are shown in the chart below. Please note that the statement text shown in the chart has been abbreviated. The full text is shown in the analysis after the chart, as well as in the questionnaire included as an appendix to this report.



"Agriculture is an important contributor to the BC economy."
The vast majority of British Columbians (93%) agree that agriculture is an important contributor to the provincial economy, including more than one-third (36%) who "strongly agree" with this statement. These results exclude the 9% of online respondents and 1% of telephone respondents who said "don't know" to this question.

"It is important that BC produce enough food so we don't have to depend on imports from other places."
Nine-in-ten (91%) residents agree that it is important for BC to produce enough food so that the province doesn't have to depend on importing food from other places, including half (50%) who "strongly agree" that this is important. These results exclude the 4% of online respondents and 0% of telephone respondents who said "don't know" to this question.

Agreement that food self-sufficiency is important has risen by 8 points from 2004 (91% vs. 83% in 2004).

"BC farmers take good care of their animals."
Most British Columbians (86%) agree that BC farmers take good care of their animals. These results exclude a notable 24% of online respondents and 5% of telephone respondents who said "don't know" to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

"I like to go out to farms and farmers markets where I can buy food directly from the farmer."
Nearly nine-in-ten British Columbians (88%) say they like to buy directly from farms and farmers markets, including 34% who "strongly agree" they like to buy directly. These results exclude the 6% of online respondents and 1% of telephone respondents who said "don't know" to this question.

This response is consistent with the 2004 survey.

"Agriculture is important to my part of the province."
Most British Columbians agree that agriculture is important to their own part of the province, including three-in-ten (31%) who "strongly agree" it is important. These results exclude the 9% of online respondents and 1% of telephone respondents who said "don't know" to this question.

The importance of agriculture to their local part of the province is down a slight 5 points from 2004 (86% vs. 91% in 2004).

"One of the important things agriculture does in BC is protect our green areas near cities so that we don't have as much urban sprawl."
Nearly eight-in-ten (78%) residents agree that a benefit of agriculture is protecting green space near cities. These results exclude the 17% of online respondents and 2% of telephone respondents who said "don't know" to this question.

This result is consistent with the 2004 survey.

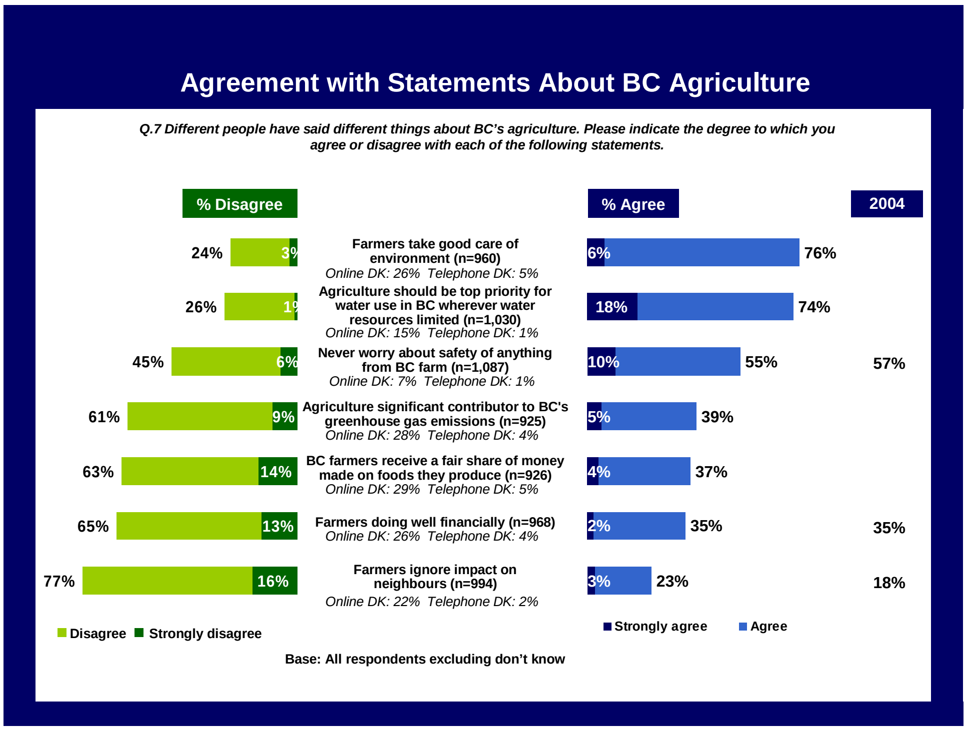
"I am concerned that some farm workers are exploited in BC."
More than three-quarters (77%) of British Columbians say they are concerned that some farm workers are being exploited in BC. These results exclude the 18% of online respondents and 3% of telephone respondents who said "don't know" to this question.

Concern about farm workers has increased by 9 points from the 2004 survey (77% vs. 68% in 2004).

Attitudes Towards Farming, Agriculture and Processing

Agreement with Statements about BC Agriculture

The results for the seven statements with the lowest levels of agreement are shown in the chart below. As in the previous chart, the statement text shown has been abbreviated. The full text is shown in the analysis after the chart, as well as in the questionnaire included as an appendix to this report.



"BC farmers take good care of the environment."
Three-quarters (76%) of British Columbians agree that farmers take good care of the environment. These results exclude the 26% of online respondents and 5% of telephone respondents who said "don't know" to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

Lower Mainland residents (72%) are *less* likely than residents of the rest of BC (81%) to agree that BC farmers take good care of the environment.

"Agriculture should be the top priority for water use in BC wherever water resources are limited."
Three-quarters (74%) of BC residents agree that agriculture should be the top priority for water resources wherever water resources are limited. These results exclude the 15% of online respondents and 1% of telephone respondents who said "don't know" to this question.

"I never worry about the safety of anything that comes from a BC farm."
A slight majority (55%) of British Columbians agree that they never worry about the safety of anything that comes from a BC farm. While the proportion disagreeing that they never worry is substantial (45% of residents), it is important to note that the statement includes the standard "never worry" (i.e. as opposed to the softer "rarely worry") which is a tough threshold to meet. These results exclude the 7% of online respondents and 1% of telephone respondents who said "don't know" to this question.

This result is consistent with the 2004 survey.

"Agriculture is a significant contributor to BC's greenhouse gas emissions."
A majority (61%) of British Columbians disagree that agriculture is a significant contributor to the provinces greenhouse gas emissions (39% agree). These results exclude the 28% of online respondents and 4% of telephone respondents who said "don't know" to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

Lower Mainland residents (42%) are more likely than residents of the rest of BC (34%) to agree that agriculture is a significant greenhouse gas contributor.

"BC farmers receive a fair share of the money made on the foods they produce."
More than six-in-ten (63%) British Columbians disagree that BC farmers receive a fair share of the money made on the foods they produce (37% agree). These results exclude the 29% of online respondents and 5% of telephone respondents who said "don't know" to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

Agreement that farmers receive a fair share is higher among men (44% vs. 30% of women) and younger residents (49% among 18-34 years vs. 37% among 35-54 years, 27% among 55+ years). Agreement is *lower* among residents of rural communities (26% vs. 37% overall) and those who live in a farming/processing household (21% vs. 38% among those who do not).

"Farmers are doing pretty well financially."
British Columbians generally do not agree that farmers are doing well financially. Two-thirds (65%) of residents disagree that BC farmers are doing pretty well financially (35% agree). These results exclude the 26% of online respondents and 4% of telephone respondents who said "don't know" to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

This result is consistent with the 2004 survey.

Agreement that farmers are doing well financially is higher in the Lower Mainland (40% vs. 29% rest of BC), among men (45% vs. 25% of women) and younger residents (45% among 18-34 years vs. 32% among 35-54 years, 31% among 55+ years). Agreement is *lower* among residents of rural communities (25% vs. 35% overall).

"Farmers don't seem to care much about the impact their operations have on their neighbours."

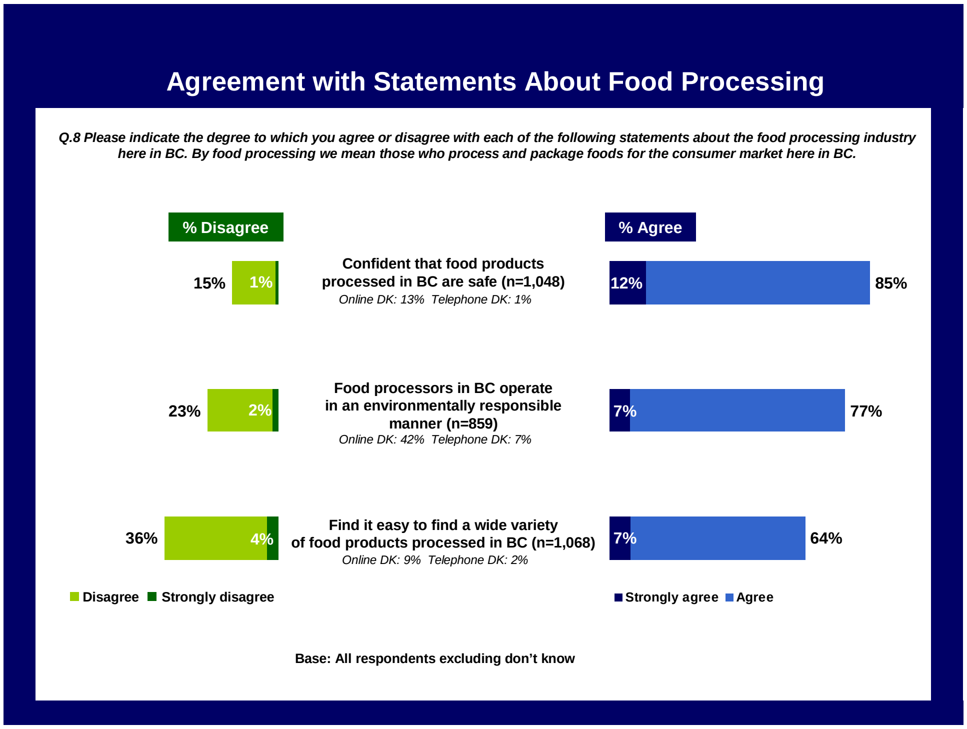
Most British Columbians believe that farmers make good neighbours. More than three-quarters (77%) disagree that farmers don't seem to care about the impact of their operations on neighbours (23% agree). These results exclude the 22% of online respondents and 2% of telephone respondents who said "don't know" to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

Agreement that farmers don't seem to care is higher among Lower Mainland residents (27% vs. 17% rest of BC). Agreement is *lower* among rural residents (15% vs. 23% overall).

Agreement with Statements about Food Processing

Survey respondents were also asked to agree or disagree with three statements about the food processing industry in BC. Food processors were defined as those who process and package foods for the consumer market in BC. The results for all three statements show the public has a positive impression of the food processing industry in BC.

Please note that the statement text shown in the chart has been abbreviated. The full text is shown in the analysis after the chart, as well as in the questionnaire included as an appendix to this report.



"I'm confident that food products processed here in BC are safe."
Most (85%) British Columbians agree they are confident that food products processed in BC are safe. These results exclude the 13% of online respondents and 1% of telephone respondents who said "don't know" to this question.

"Food processors in BC operate in an environmentally responsible manner."
Slightly more than three-quarters (77%) of British Columbians agree that BC food processors operate in an environmentally responsible manner. These results exclude the 42% of online respondents and 7% of telephone respondents who said "don't know" to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

Residents of towns (85%) and rural communities (84%) are more likely than city (74%) or suburban (75%) residents to agree that BC food processors operate in an environmentally responsible manner.

"I find it easy to find a wide variety of food products processed here in BC."
Nearly two-thirds (64%) of residents agree that they find it easy to find a wide variety of food products processed here in BC. These results exclude the 9% of online respondents and 2% of telephone respondents who said "don't know" to this question.

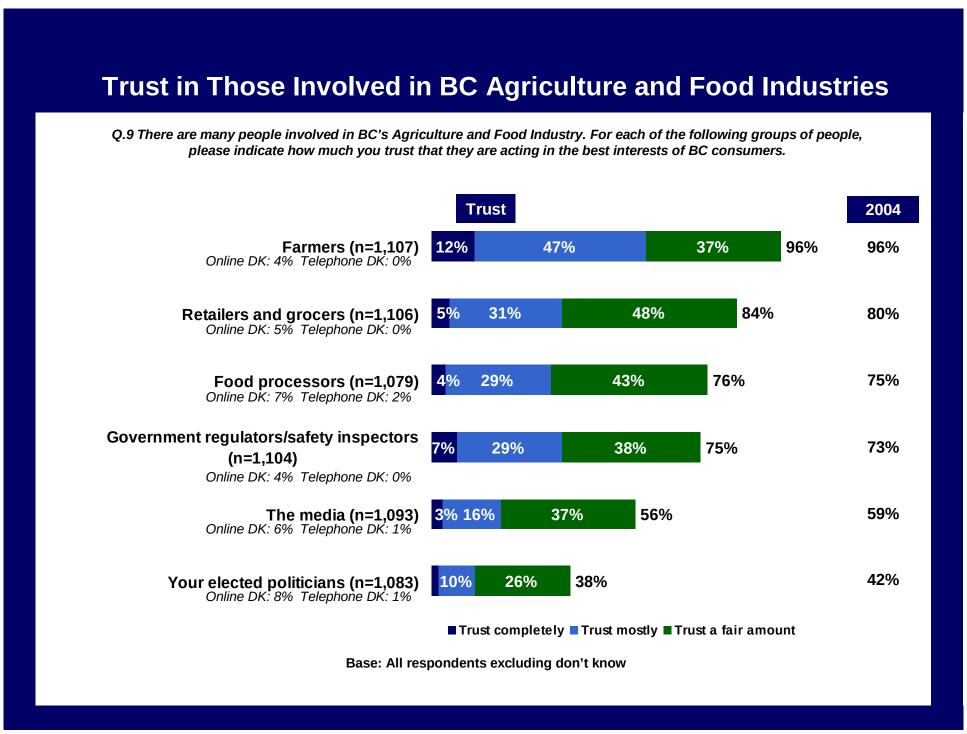
Trust in Those Involved in BC Agriculture and Food Industries

Survey respondents were asked to indicate how much they trust that various groups are acting in the best interests of BC consumers. The scale used was “trust completely”, “trust mostly”, “trust a fair amount”, “trust not very much” and “trust not at all”. The top three categories are summarized in the chart below.

Farmers are at the top of the public trust scale. Nearly all British Columbians (96%) say they trust farmers at least “a fair amount” to act in the best interests of consumers. Retailers and grocers are next best, with the trust of 84% of residents, followed by food processors (76%) and government regulators/safety inspectors (75%).

A slight majority (56%) of residents say they trust the media at least “a fair amount” to act in the best interest of consumers. Elected politicians score lowest on the public trust scale, with fewer than four-in-ten (38%) saying they trust politicians at least “a fair amount”.

All results are consistent with the 2004 survey. In fact, the rank order of the various stakeholders is identical to 2004.



Notable Differences

Farmers

- None

Retailers and grocers who sell food to you

- None

Food processors that prepare and package food

- None

Government regulators and safety inspectors

- None

The Media

- None

Your Elected Politicians

- Trust is higher among younger residents (47% among 18-34 years vs. 35% among 35-54 years, 33% among 55+ years).

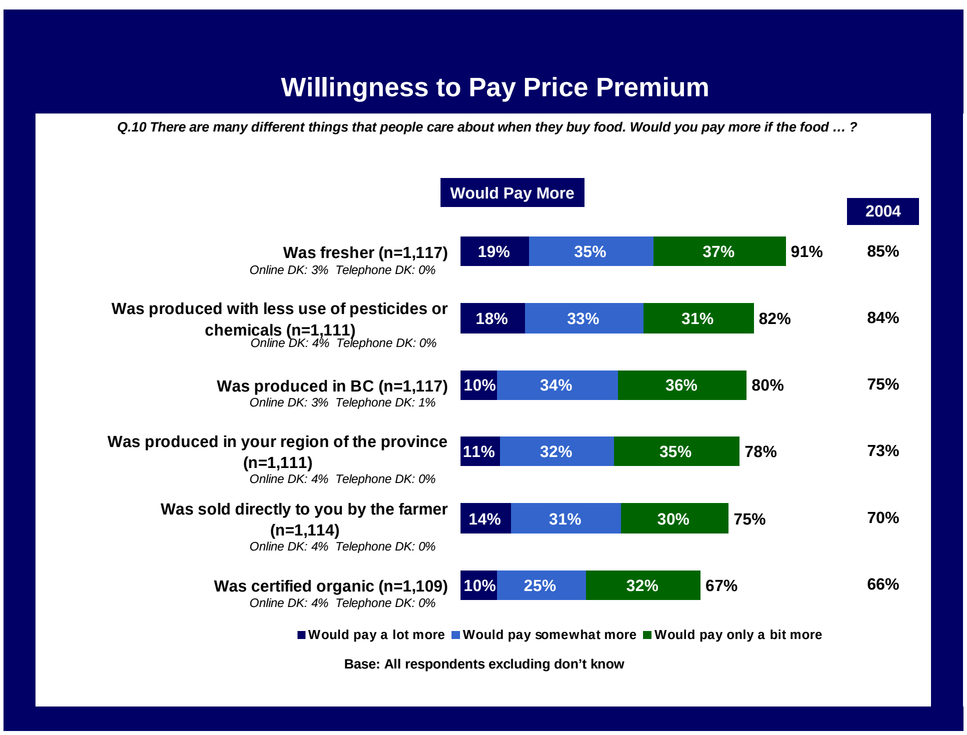
Willingness to Pay Price Premium

Survey respondents were asked to indicate whether they would pay more for food under certain conditions. The scale used was “would pay a lot more”, “would pay somewhat more”, “would pay only a bit more” and “would not pay more”. The top three categories (i.e. would pay more) are summarized in the chart below.

A majority of British Columbians say they would pay more (“a lot”, “somewhat” or “only a bit”) for food under each of the six conditions tested. Freshness is the most appealing attribute, with nine-in-ten (91%) residents saying they would pay more for food that “was fresher”. Roughly eight-in-ten say they would pay more for food that “was produced with less use of pesticides or chemicals” (82%), “was produced in BC” (80%) or “was produced in your region of the province” (78%).

Slightly fewer residents, but still a strong majority, would pay more for food that “was sold directly to you by the farmer” (75%) or “was certified organic” (67%).

These results are mostly consistent with the 2004 survey. The rank ordering of the items is also identical to 2004. While consistent with 2004 results, the appeal of some attributes has increased slightly from the earlier survey. Willingness to pay more has increased for freshness (up 6 points), being produced in BC (up 5 points), being produced in your region (up 5 points) and direct sales from the farmer (up 5 points).



Notable Differences

Was fresher

- None

Was produced with less use of pesticides or chemicals

- None

Was produced in BC

- A willingness to pay more for food produced in BC is stronger outside the Lower Mainland (85% vs. 75% in Lower Mainland), especially among Vancouver Island residents (90%).

Was produced in your region of the province

- A willingness to pay more for food produced in their region is stronger outside the Lower Mainland (82% vs. 72% in Lower Mainland).

Was sold directly to you by the farmer

- A willingness to pay more for food direct from the farmer is strongest on Vancouver Island (85%), as compared to the North (75%), Southern Interior (74%) and Lower Mainland (72%).

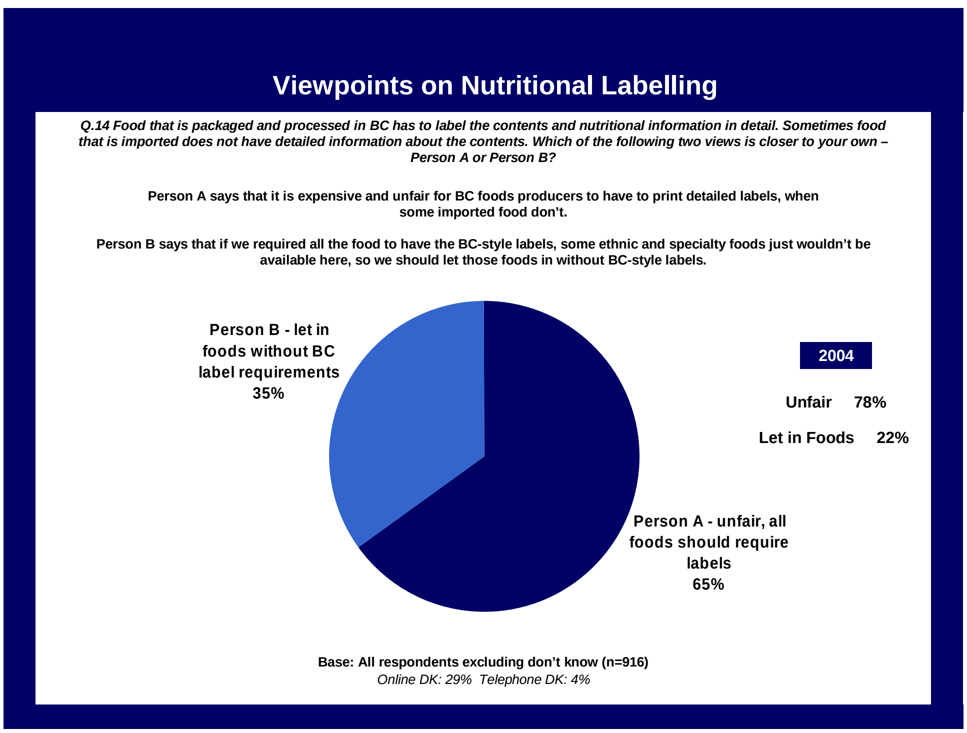
Was certified organic

- A willingness to pay more for certified organic food is strongest on Vancouver Island (73%), especially compared to the North (61%) and Southern Interior (61%). Older residents are *less* willing to pay more for certified organic food (58% among 55+ years vs. 70% among 18-34 years, 71% among 35-54 years).

Viewpoints on Nutritional Labelling

When it comes to nutritional labelling for imported foods, two-thirds (65%) of British Columbians side with the viewpoint that "*it is expensive and unfair for BC foods producers to have to print detailed labels, when some imported food don't.*" One-third (35%) of residents agree more with the alternative view that *"if we required all the food to have the BC-style labels, some ethnic and specialty foods just wouldn't be available here, so we should let those foods in without BC-style labels."* These results exclude the 29% of online respondents and 4% of telephone respondents who provided no response to this question. The high level of online "don't know" responses is indicative that the BC public does not have a high level of knowledge of this particular issue.

While a majority of the public sides with the viewpoint that imported foods should meet the same labelling requirements as local foods, the size of the majority has been reduced from the 2004 survey. In 2004, nearly eight-in-ten (78%) residents said that differing requirements for imported foods are unfair, 13 points higher than today.



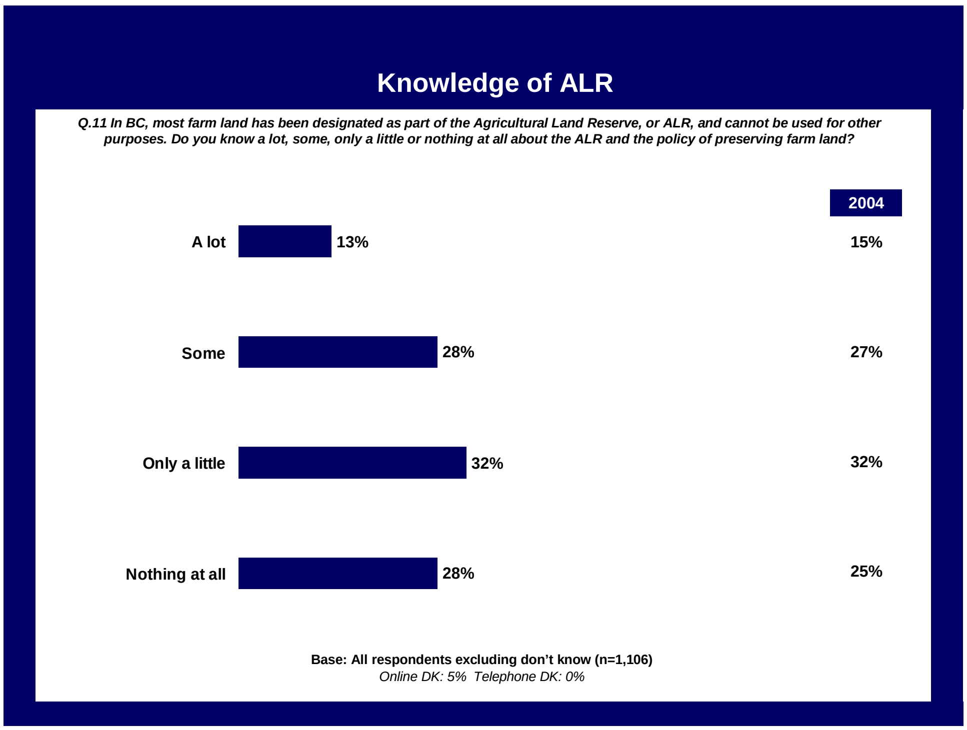
Notable Differences

- A view that differing label requirement is expensive and unfair is higher among older residents (73% among 55+ years vs. 64% among 35-54 years, 57% among 18-34 years) and also higher among residents of the Southern Interior (74%) and North (72%), compared to residents of the Lower Mainland (62%) and Vancouver Island (64%).

Knowledge of ALR

Most British Columbians admit their knowledge of the Agricultural Land Reserve (ALR) is limited. Only 13% of residents say they know "a lot" about the ALR, with a further three-in-ten (28%) saying they know "some". Six-in-ten (59%) residents say they know either "only a little" (32%) or "nothing at all" (28%) about the ALR.

These results are consistent with the 2004 survey.



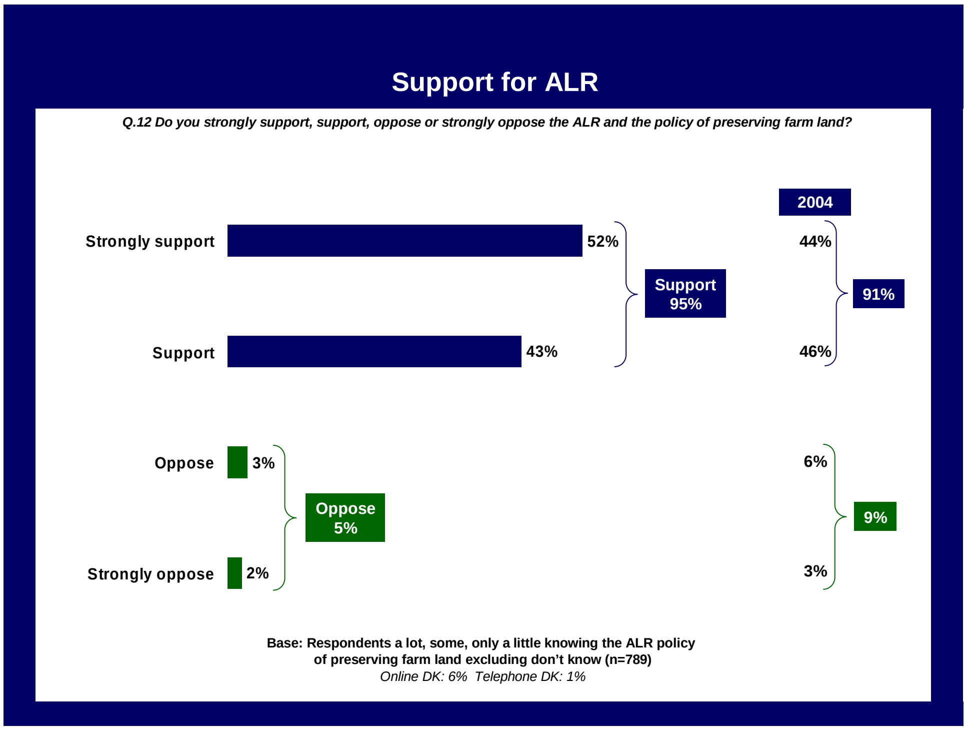
Notable Differences

- Overall, four-in-ten (41%) residents say they know "a lot" or "some" about the ALR. This knowledge is higher among Southern Interior (49%) and Vancouver Island (45%) residents than among Lower Mainland (38%) or Northern (31%) residents. It is also higher among men (47% vs. 35% among women), older residents (55% among 55+ years vs. 38% among 18-34 years, 39% among 35-54 years), rural residents (57% vs. 41% overall) and those who live in a farming/processing household (56% vs. 40% among those who do not).

Support for ALR

British Columbians may not know a lot about ALR, but they do support the concept of preserving farm land. Among British Columbians with at least a little knowledge of ALR, the vast majority (95%) say they support the ALR and the policy of preserving farm land, including 52% who "strongly support" this concept.

Overall support for ALR is up a slight 4 points from 2004 (95% today vs. 91% in 2004).



Notable Differences

- None

Agreement with ALR Statements

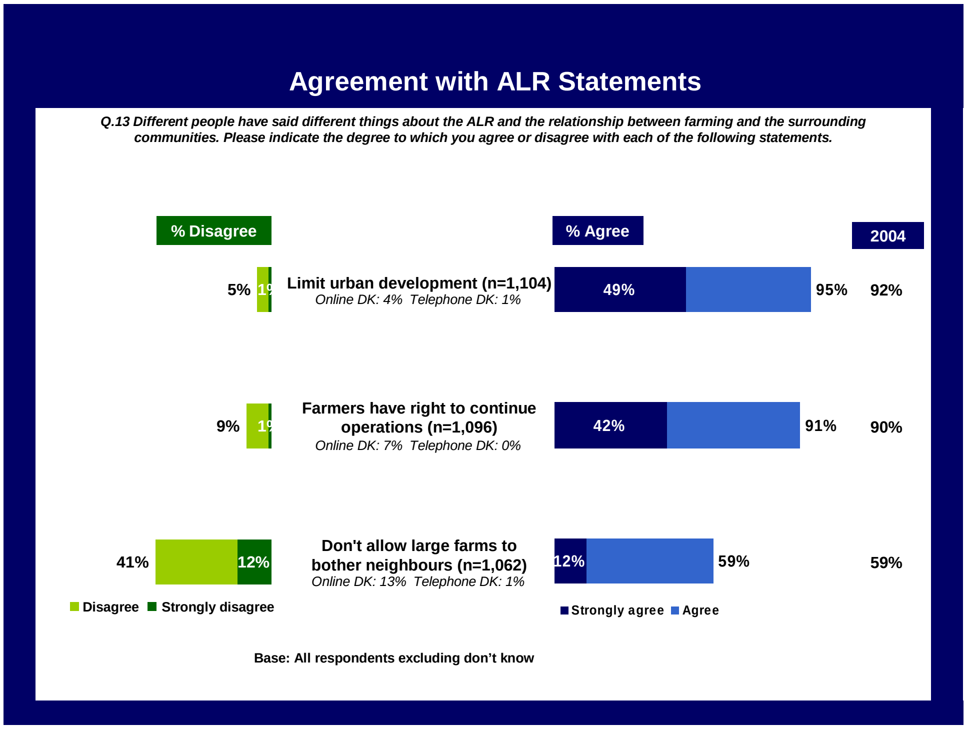
All survey respondents were asked to agree or disagree with a series of three statements about the ALR and the relationship between farming and surrounding communities. Please note that the statement text shown in the chart has been abbreviated. The full text is shown in the analysis after the chart, as well as in the questionnaire included as an appendix to this report.

Nearly all British Columbians think it is okay to limit development in order to protect agricultural land. Ninety-five percent of residents say they agree*"the government should limit urban development in farm areas to protect farmers and agricultural land,*" including half (49%) who "strongly agree" with this statement.

Most British Columbians also believe that farmers should have a right to continue their operations even if it impacts new neighbourhoods built around farmland. Nine-in-ten (91%) residents agree that *"as neighbourhoods are built around farmland, farmers have a right to continue using reasonable farm practices, even if the new neighbours oppose the odours or other impacts that sometimes come with farming,*" including four-in-ten (42%) who "strongly agree".

British Columbians are more split on the issue of whether there is a difference between small family farms and large-scale farming operations when it comes to bothering their neighbours. Six-in-ten (59%) residents agree "*it's okay to have small family farms near housing and urban areas, but we shouldn't allow large-scale farming operations that bother their neighbours,*" while four-in-ten (41%) disagree.

The results for all statements are consistent with the 2004 survey.



Notable Differences

"The government should limit urban development in farm areas to protect farmers and agricultural land."

- None

"As neighbourhoods are built around farmland, farmers have a right to continue using reasonable farm practices, even if the new neighbours oppose the odours or other impacts that sometimes come with farming."

- None

"It's okay to have small family farms near housing and urban areas, but we shouldn't allow large-scale farming operations that bother their neighbours."

- None

Sample Characteristics

Sample Characteristics

	Total (n=1,142) %	Online (n=642) %	Telephone (n=500) %
Gender:			
Male	49	49	49
Female	51	51	51
Age:			
18–34	29	29	28
35–54	39	39	39
55+	32	32	32
Average Age	*47 years*	*47 years*	*47 years*
Type of Community Live In:			
A city	49	50	48
A suburban area	23	24	22
A town	14	14	14
A rural area	14	11	17
Work Directly/Indirectly in Farming/Food Processing Industries:			
Yes	7	6	8
No	93	93	92

Sample Characteristics

	Total (n=1,142) %	Online (n=642) %	Telephone (n=500) %
Education:			
High school or less	25	25	25
Some post-secondary	35	35	35
University grads	39	39	39
Household Income:			
Less than $40K	24	28	18
$40K–less than $75K	32	32	31
$75K or more	40	40	39
Not stated	5	0	11
Residence:			
Lower Mainland	58	58	58
Southern Interior	16	16	16
North	7	7	7
Vancouver Island	19	19	19

APPENDIX: QUESTIONNAIRE

Investment Agriculture Foundation
Agriculture Issues Opinion Poll
Final Telephone Questionnaire
Revised September 25, 2008

Introduction

Hello, this is ________ calling from Ipsos Reid. We're a professional public opinion research company. Today we're talking to a random sample of British Columbians about their views on some industries that operate in BC. The survey will take about 10 minutes of your time. Let me assure you I'm not trying to sell you anything. I'd like to speak to the person in your household who is 18 years of age or older and who had their birthday last. Is that you?

Yes (CONTINUE)
Don't Know (ASK AGAIN, IF STILL DK/REF THEN THANK AND TERMINATE)
No - May I speak to that person? (IF "YES": RE-READ INTRODUCTION, IF NOT AT HOME, SCHEDULE A CALLBACK)

Perceptions of Agriculture in BC

1. To begin, when I mention agriculture and farming in BC, what is the first thing that you think of?

RECORD OPEN-ENDED

[ROTATE Q2 AND Q3]

2. And when you think of agriculture in BC, do you think of it as large-scale farming operations or as smaller, local farms?

Large-scale farming operations
Smaller, local farms
Both (DO NOT READ)

3. And when you think of agriculture in BC, do you think of it as using the latest farming techniques and research or as being more traditional in its products and farming techniques?

Using the latest farming techniques and research
Being more traditional in its products and farming techniques
Both (DO NOT READ)

4. Overall, would you say that the agriculture industry in BC is in excellent shape, good shape, only fair shape, poor shape or very poor shape?

Excellent shape
Good shape
Only fair shape
Poor shape
Very poor shape

5. Would you say that you know a lot, a fair amount, not very much, or little about farming in BC?

A lot
A fair amount
Not very much
Little

6. Where do you get most of your information about agriculture in BC from? Anywhere else? [PROBE FOR UP TO THREE RESPONSES]

RECORD OPEN-ENDED

General Attitude Statements

7. Different people have said different things about BC's agriculture. For each of the following statements, I would like you to tell me whether you strongly agree, agree, disagree or strongly disagree with each. Let's begin … do you strongly agree, agree, disagree or strongly disagree with the statement that [INSERT RANDOM]? How about [INSERT RANDOM]?

Agriculture is important to my part of the province.
Farmers are doing pretty well financially.
I never worry about the safety of anything that comes from a BC farm.
BC farmers receive a fair share of the money made on the foods they produce.
It is important that BC produce enough food so we don't have to depend on imports from other places.
Farmers don't seem to care much about the impact their operations have on their neighbours.
One of the important things agriculture does in BC is protect our green areas near cities so that we don't have as much urban sprawl.
I am concerned that some farm workers are exploited in BC.
I like to go out to farms and farmers markets where I can buy food directly from the farmer.
BC farmers take good care of the environment.

BC farmers take good care of their animals.
Agriculture is a significant contributor to BC's greenhouse gas emissions.
Agriculture should be the top priority for water use in BC wherever water resources are limited.
Agriculture is an important contributor to the BC economy.

Answer Choices
Strongly Agree
Agree
Disagree
Strongly Disagree

Attitude Statements – Food Processing

8. Now I have some other statements about the food processing industry here in BC. By food processing I mean those who process and package foods for the consumer market here in BC. Let's begin … do you strongly agree, agree, disagree or strongly disagree with the statement that [INSERT RANDOM]? How about [INSERT RANDOM]?

I'm confident that food products processed here in BC are safe.
I find it easy to find a wide variety of food products processed here in BC.
Food processors in BC operate in an environmentally responsible manner.

Answer Choices
Strongly Agree
Agree
Disagree
Strongly Disagree

Trust – People Involved in Industry

9. There are many people involved in BC's Agriculture and Food Industry. For each of the following groups of people, I want you to tell me how much you trust that they are acting in the best interests of BC consumers. Do you trust them completely, mostly, a fair amount, not very much, or not at all. How much do you trust that [INSERT RANDOM] are acting in the best interests of BC consumers? (READ LIST) How about [INSERT RANDOM]? (READ LIST AS NECESSARY)

Farmers
Food processors that prepare and package food
Your elected politicians
Government regulators and safety inspectors
The media
Retailers and grocers who sell food to you

Answer Choices
Completely
Mostly
A fair amount
Not very much
Not at all

Willingness to Pay More for Food

10. There are many different things that people care about when they buy food. Would you pay a lot more, somewhat more, only a bit more or would you not pay more if the food [INSERT RANDOM]? How about if the food [INSERT RANDOM]? (READ LIST AS NECESSARY)

Was produced in BC
Was fresher
Was produced with less use of pesticides or chemicals
Was produced in your region of the province
Was certified organic
Was sold directly to you by the farmer

Answer Choices
Pay a lot more
Somewhat more
Only a bit more
Not pay more

Agricultural Land Reserve (ALR)

11. In BC, most farm land has been designated as part of the Agricultural Land Reserve, or ALR, and cannot be used for other purposes. Do you know a lot, some, only a little or nothing at all about the ALR and the policy of preserving farm land?

A lot
Some
Only a little
Nothing at all

[IF NOTHING AT ALL/DK/REF, SKIP TO Q13 – ELSE, CONTINUE]

12. Do you strongly support, support, oppose or strongly oppose the ALR and the policy of preserving farm land?

Strongly support
Support
Oppose
Strongly oppose

13. Different people have said different things about [IF ASKED Q12, INSERT "the ALR" – IF NOT ASKED Q12, INSERT "the relationship between farming and the surrounding communities"]. For each of the following statements, I would like you to tell me whether you strongly agree, agree, disagree or strongly disagree with each. Let's begin ... do you strongly agree, agree, disagree or strongly disagree with the statement that [INSERT RANDOM]? How about [INSERT RANDOM]?

The government should limit urban development in farm areas to protect farmers and agricultural land.
As neighbourhoods are built around farmland, farmers have a right to continue using reasonable farm practices, even if the new neighbours oppose the odours or other impacts that sometimes come with farming.
It's okay to have small family farms near housing and urban areas, but we shouldn't allow large-scale farming operations that bother their neighbours.

Answer Choices
Strongly Agree
Agree
Disagree
Strongly Disagree

Labelling

14. Food that is packaged and processed in BC has to label the contents and nutritional information in detail. Sometimes food that is imported does not have detailed information about the contents. Which of the following two views is closer to your own – Person A or Person B?

Person A says that it is expensive and unfair for BC foods producers to have to print detailed labels, when some imported foods don't.

Person B says that if we required all the food to have the BC-style labels, some ethnic and specialty foods just wouldn't be available here, so we should let those foods in without BC-style labels.

(DO NOT READ ANSWER CHOICES)

Person A – unfair, all foods should require labels
Person B – let in foods without BC label requirements

Demographics

Now, I have a few final questions for statistical purposes only...

15. In what year were you born?

RECORD YEAR [1900-1990]

16. Do you or anyone in your household work directly or indirectly in farming or food processing industries?

Yes
No

17. Which of the following best describes the community in which you live? (READ LIST)

A city
A suburban area
A town
A rural area

18. What is the highest level of formal education that you yourself have completed? (READ LIST – STOP READING LIST WHEN ANSWER PROVIDED)

Primary School or less
Some High School
High School
Some Community College or Trade School
Completed Community College or Trade School
Some University
University Undergraduate degree
University Graduate degree

19. And finally, in which of the following categories does your household income before taxes fall? (READ LIST – STOP READING LIST WHEN ANSWER PROVIDED)

Less than $30,000
$30,000 to just under $40,000
$40,000 to just under $50,000
$50,000 to just under $60,000
$60,000 to just under $75,000
$75,000 to just under $100,000
$100,000 or more

20. Record Gender (Do Not Read)

Male
Female

Thank you for taking part in this survey!