# Colorado Attitudes about Agriculture and Food

2016 Executive Summary

A STUDY BY THE COLORADO DEPARTMENT OF AGRICULTURE
IN COOPERATION WITH THE COLORADO STATE UNIVERSITY DEPARTMENT OF AGRICULTURAL AND RESOURCE ECONOMICS

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# Colorado Attitudes about Agriculture and Food

## Highlights from 2016 Update

This summary highlights some key findings of the 2016 Survey on Public Attitudes about Colorado Agriculture, conducted by the Colorado Department of Agriculture in collaboration with Colorado State University. The study's figures, tables and discussions are based on the responses of 1000 Coloradans who participated in an online survey in August/September 2016. What is most suprising and of note for this survey are the consistent and persistent attitudes about Colorado agriculture over the years, even though different Coloradans are surveyed at each five-year interval. This is important to note in an era where the visibility, conversations and perceptions of so many topics (food systems, natural resources) are seemingly dynamic. The highlights in this executive summary demonstrate persistently positive attitudes to the agriculture sector, as well as issues where new questions shed light on changing dynamics.

There are several categories of questions in this study, including:

- The role of agriculture as an economic driver and contributor to quality of life, and impressions that respondents had when asked to define agriculture in Colorado;

- A variety of issues exploring the interface between agriculture and natural resources, including wildlife, water, outdoor recreation, animal welfare, and land use planning and conservation;

- Various attitudes on production practices including necessity of and perceived safety associated with pesticide use, animal welfare, genetically engineered foods and alternative markets;

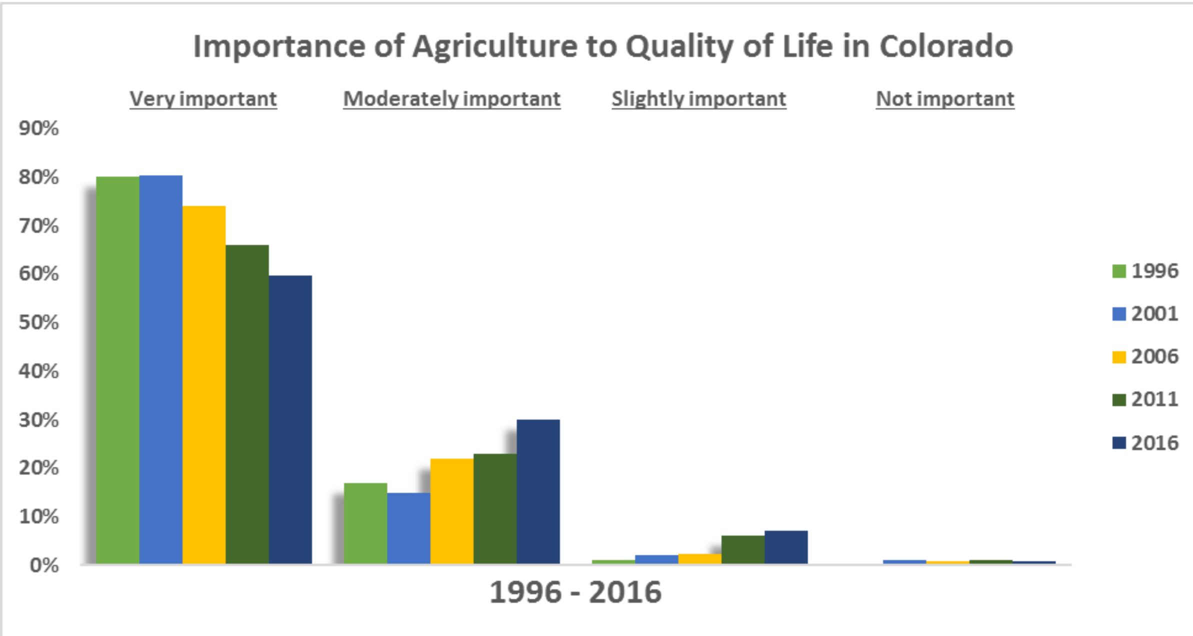
- Consumer purchasing behavior and preferences for a variety of products and food attributes, respondents' frequency of shopping at different food retail and restaurant venues, as well as awareness and interest in local and Colorado Proud food products;

- Opinions of Coloradans about a variety of food system stakeholders, including perceptions about the credibility of information on agriculture and food from these sources.

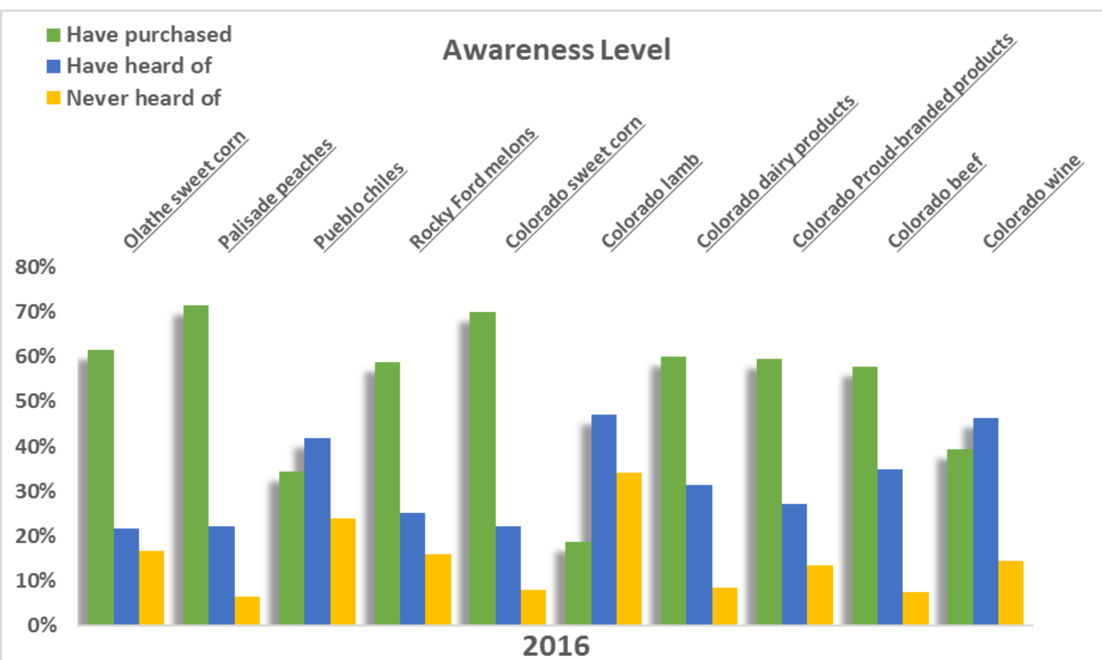
This report focuses on the current opinions and attitudes and, in the majority of cases, how these vary from past surveys conducted in 1996, 2001, 2006 and 2011. Complete results are available at www.coloradoagriculture.com.

In this report overview, we will focus on several highlights from each section of the full report.

1) It appears that agriculture is a key element of the quality of life respondents experience in Colorado. Overwhelmingly (90%), respondents indicated that the presence of ranches, farms and agriculture was either moderately to very important to the quality of life in Colorado. However, this does represent a slight decrease from previous years, particularly the share rating it as very important.




2) In recent years, agricultural producer groups have sought to increase brand awareness and sales of a wide range of Colorado products. These efforts appear to be successful as awareness and trial of branded products are high among Coloradans.



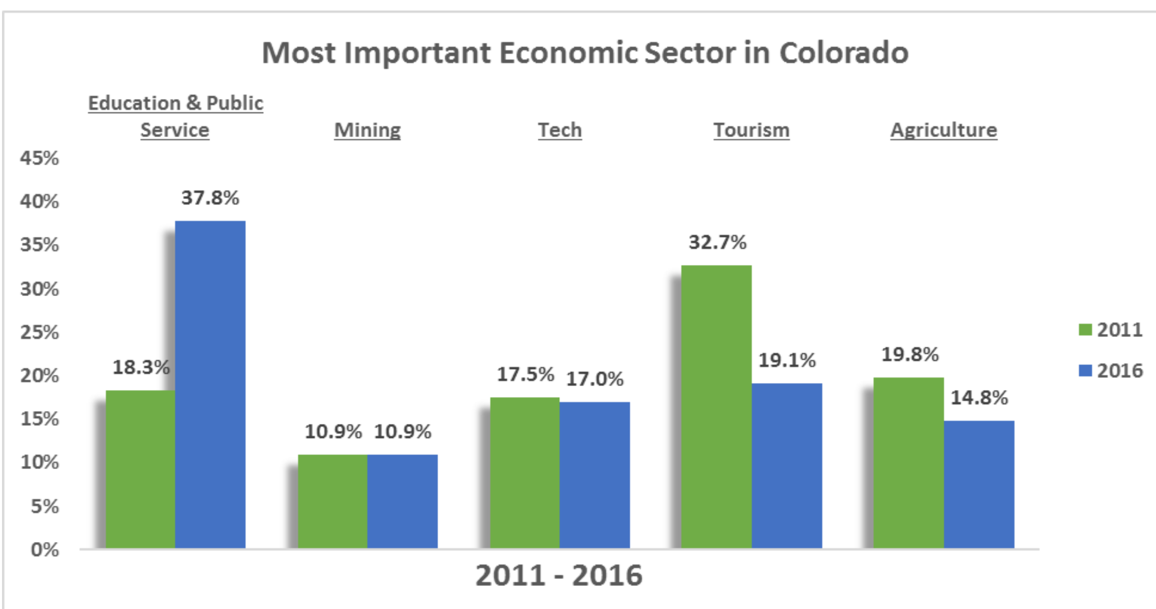
3) When Coloradans were asked what agricultural product had the most economic significance, they saw an increasingly diverse set of sectors as important to the state. As was the case in 2011, corn was most commonly mentioned (17% of all respondents), followed by cattle/beef (15%), and wheat (10%). This varied from earlier years when beef/cattle was most commonly mentioned, and is a particularly interesting change given that cattle and calves generate about half of Colorado farm and ranch cash receipts.

**Agricultural product with the most economic importance for Colorado**
**(Frequency of answers and share of total responses by year)**

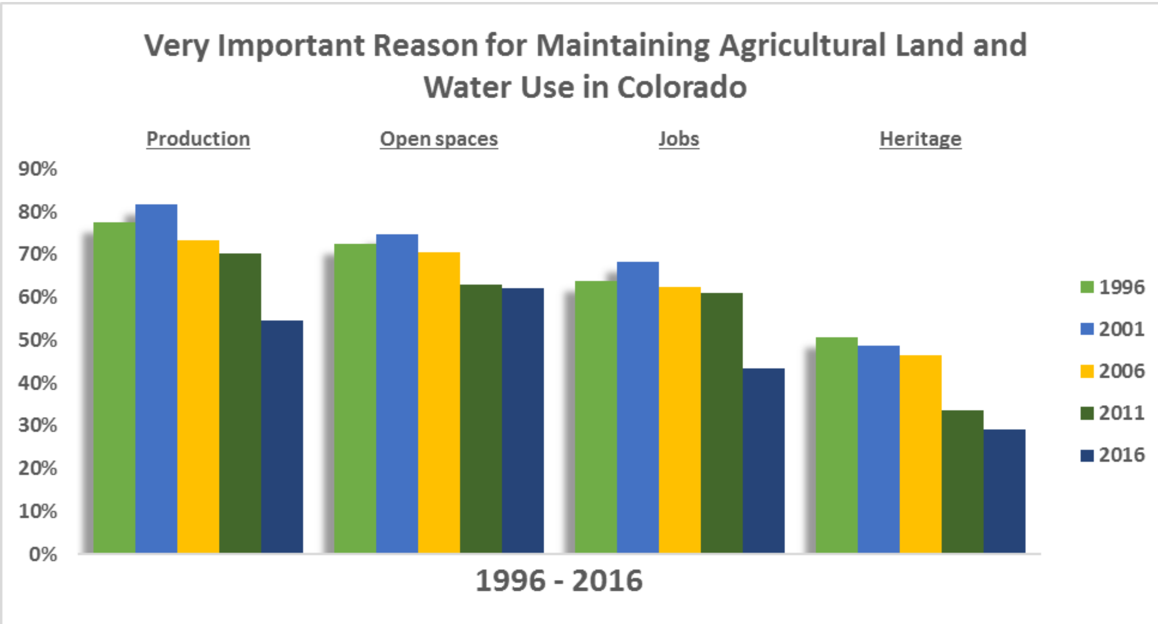
| | 1996 | 2001 | 2006 | 2011 | 2016 |
|---|---|---|---|---|---|
| **Corn** | 10% | 9% | 13% | 22% | 17% |
| **Cattle or Beef** | 22% | 22% | 17% | 16% | 15% |
| **Wheat** | 29% | 18% | 15% | 13% | 10% |
| **Marijuana*** | NA | NA | NA | NA | 8% |
| **Peaches** | 1% | 2% | 2% | 5% | 8% |
| **Vegetables** | 1% | 1% | 2% | 2% | 3% |
| **Melons & Fruit*** | NA | NA | NA | 5% | 3% |
| **Alfalfa Hay** | 2% | 2% | 2% | 2% | 2% |
| **Potatoes** | 3% | 3% | 3% | 3% | 2% |
| **Beets** | 4% | 5% | 4% | 2% | 2% |

*Included in 2011 and 2016 list because of increased frequency of responses.

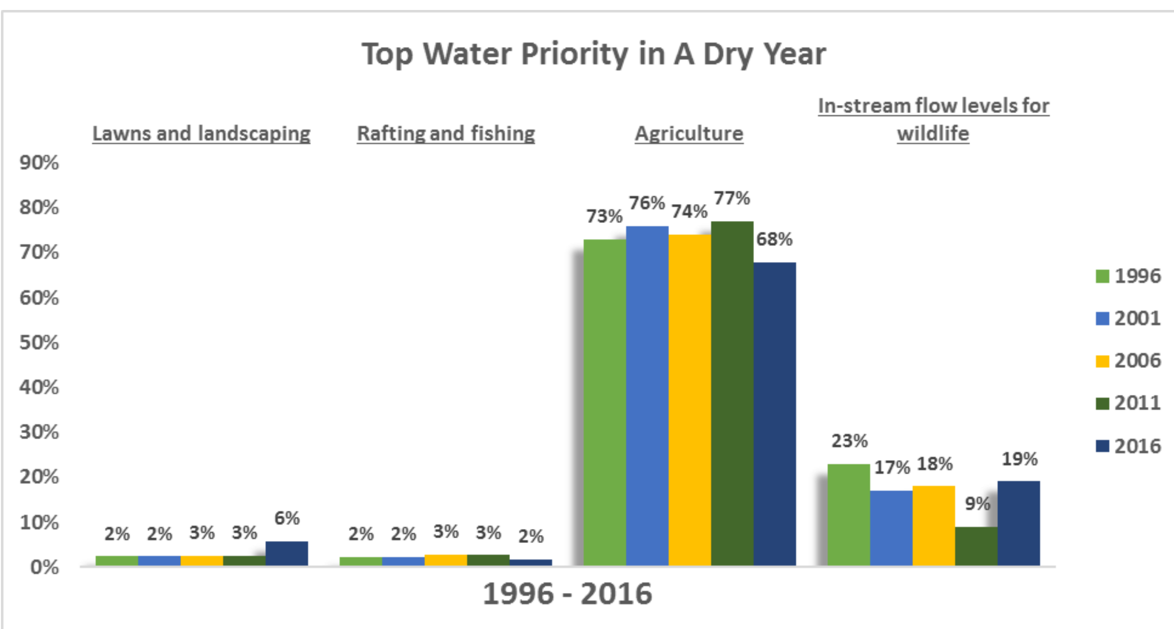
4) We also asked how important agriculture was relative to other economic sectors in Colorado, and while agriculture (14.8%) is still notable to some, more visible sectors such as education, public service and tourism are perceived as more important to Coloradans. It should be noted that education and public service were added in 2011 based on increased mentions in the "other" write-in responses, so comparisons to earlier years is not appropriate for periods earlier than 2011.



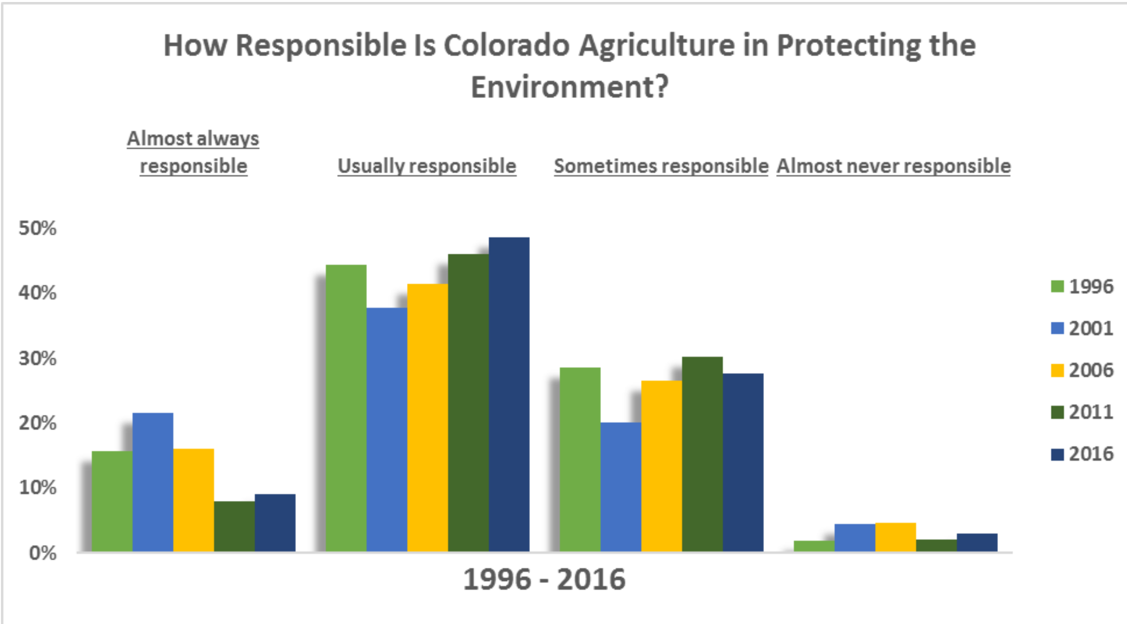
5) Consistently over the last 25 years (and across different respondents), almost 95% of Coloradans felt that maintaining land and water in agricultural production was very or somewhat important and 83% would support purchasing development rights to maintain those lands. Open spaces and food production appear to have the most broad-based value to respondents (over 50% rated as very important).



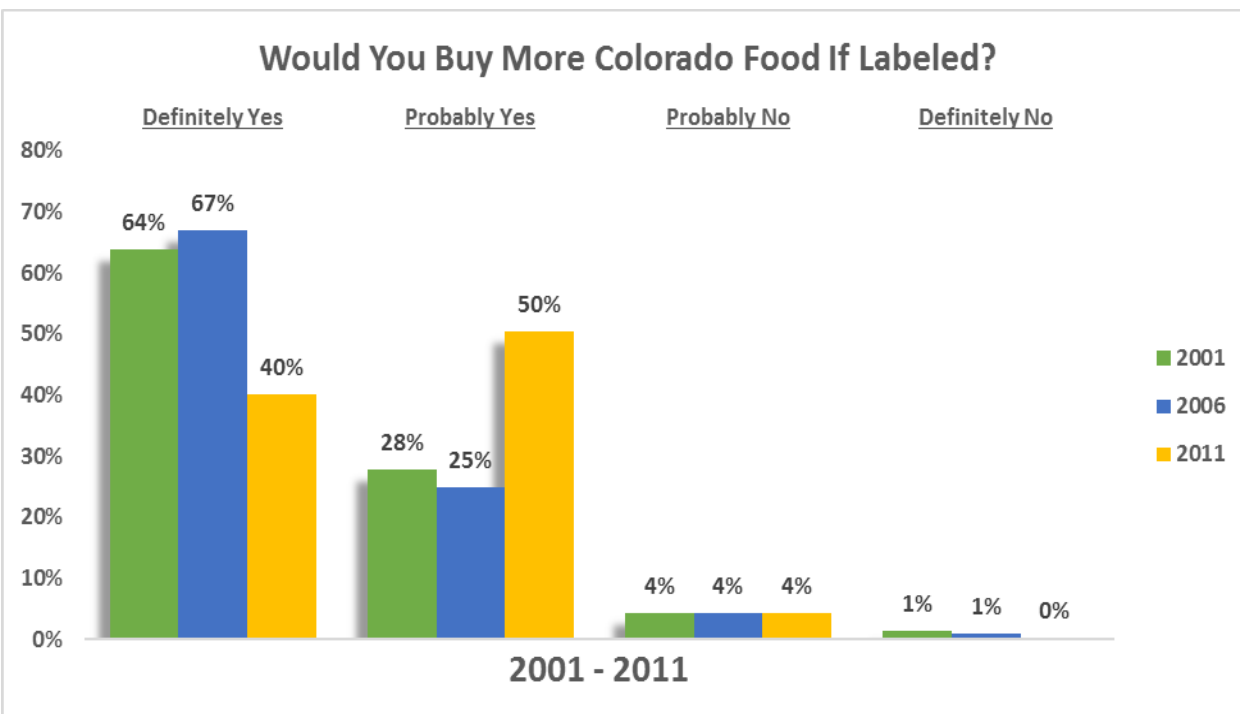

6) Further, since providing water to agriculture can mean constraints on other uses of water, respondents were asked which uses of water would be their top priority in a dry year. A substantial majority of respondents (68%) indicated that agriculture should be the top priority for water allocation in a dry year. This number declined from 2011 while in-stream flow levels and lawns/landscaping both increased as a priority.



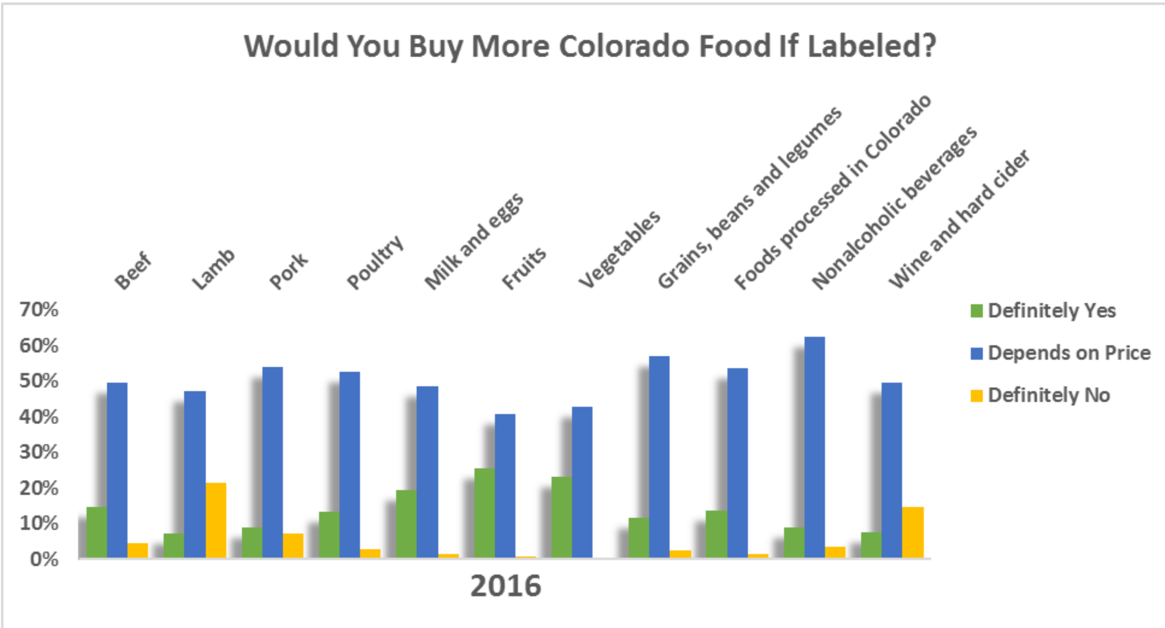
7) Over half of the respondents (58%) felt agriculture was almost always (9%) or usually (49%) environmentally responsible. When combined, these answers return to confidence shared in 1996 (60%), 2001 (59%) and 2006 (57%), which is an improvement in confidence from the 54% in 2011.



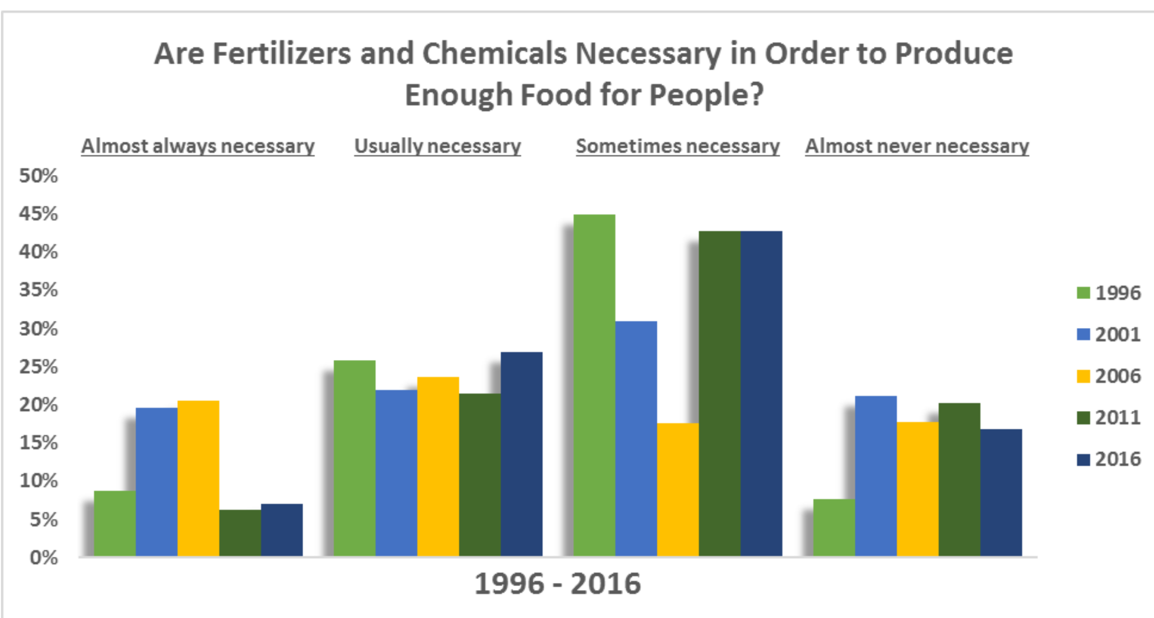

8) Coloradans' support for agriculture continues to be strong. In 2011 when the question was still asked broadly about all food, 90% of Coloradans would definitely or probably buy more Colorado products if they were available and labeled as being from Colorado.



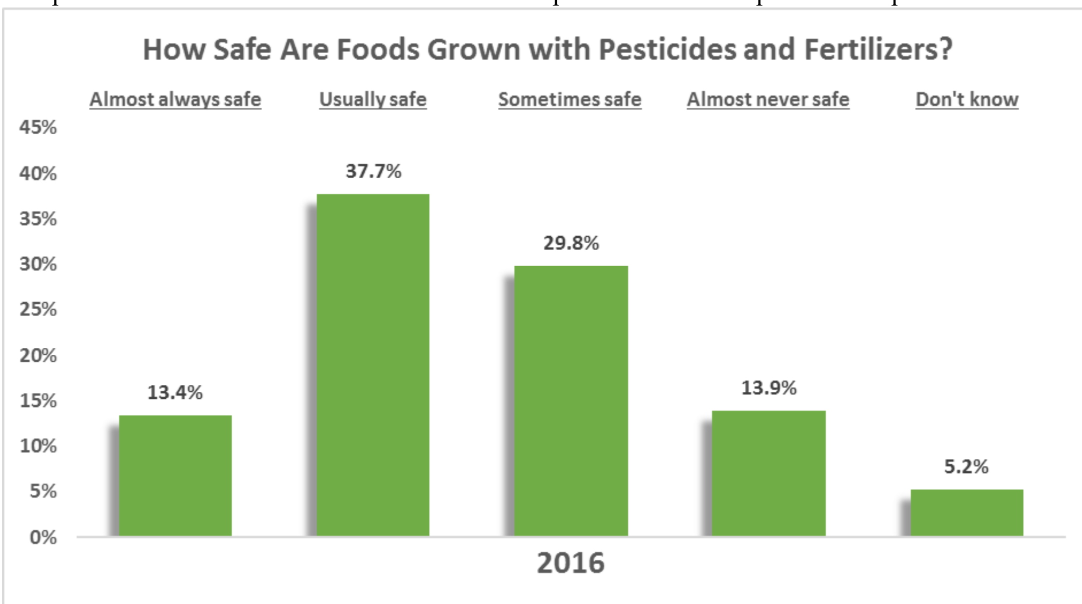
9) In a new 2016 question about buying specific Colorado foods, price was important to a large share of respondents (40-62% depending on product), as would be expected. Still, there was a high share of respondents who definitely seek out the state's fruits, vegetables, milk, eggs and other food products, perhaps even at a premium. Together with the 25% responding that Colorado Proud labels are important when deciding what food to buy, we can infer that there is buyer loyalty in support of Colorado food companies.



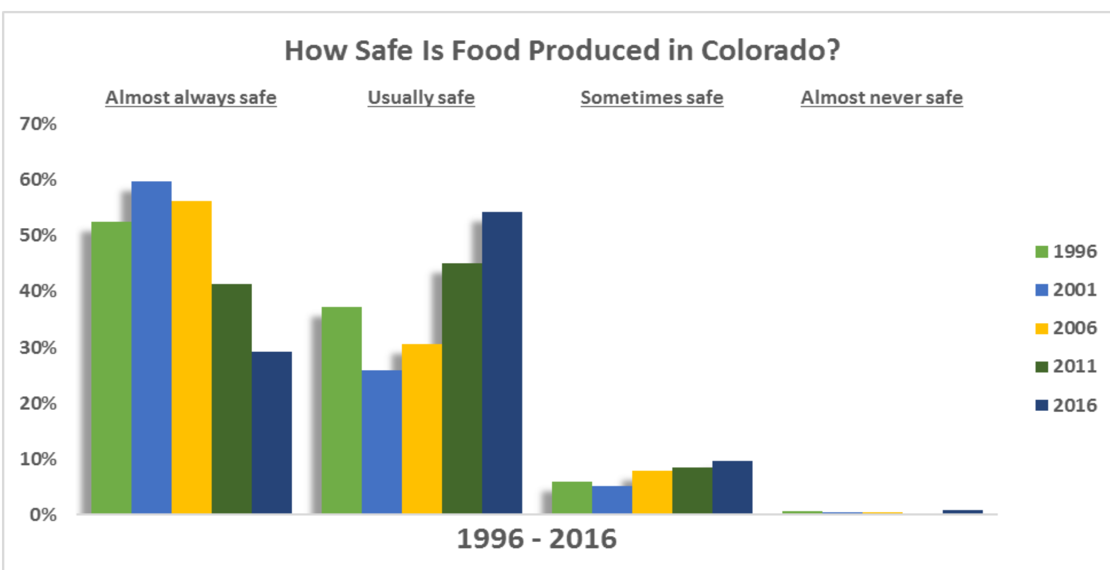

10) In 2016, questions about perceptions of production practices were altered a bit, so that we could explore both whether Coloradans thought such practices were safe, and also whether they felt they may be necessary for food security (needed to produce enough food for people). In 2016, we continued to see most Coloradans found fertilizer and chemical inputs at least somewhat necessary to produce enough food (77% compared to 70% in 2011), but only 7% found it almost always necessary.



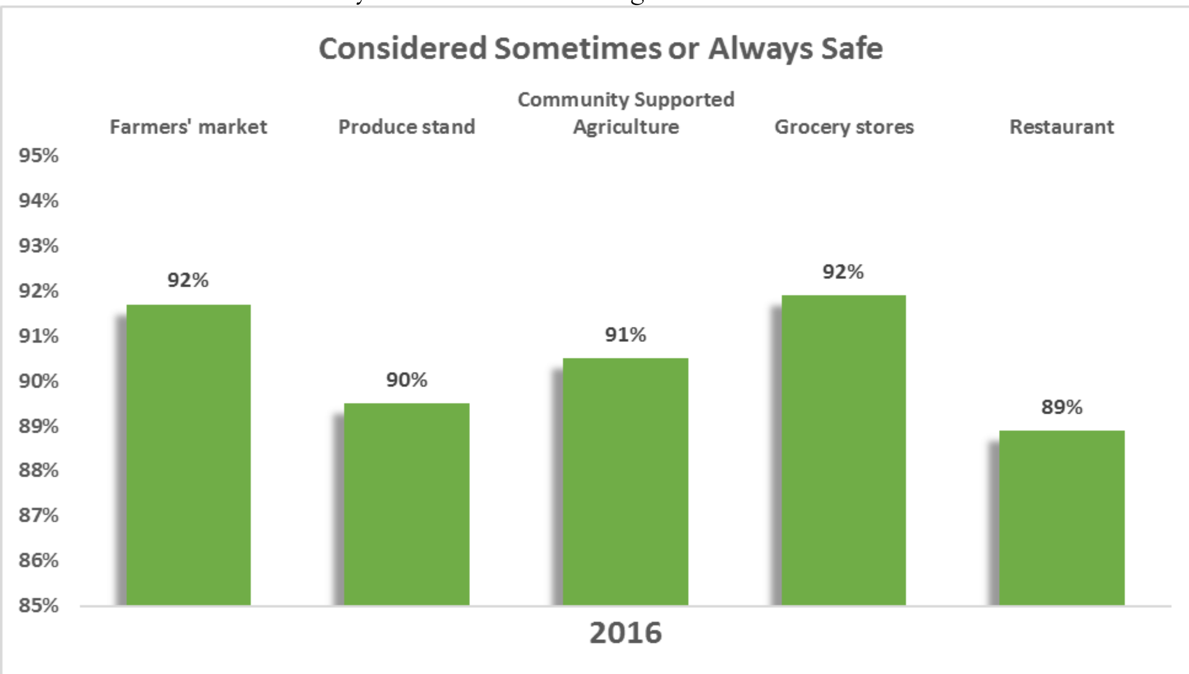
11) In 2016, respondents were then asked a follow-up question on the safety of foods grown with pesticides and fertilizers and over 80% felt they were at least sometimes safe. The smaller share who felt they were almost always safe (13.4%) and the share who felt they were almost never safe (13.9%) show some polarization around acceptability of production practices. And, there was similar dissension about genetically engineered foods, antibiotics and hormone usage. It is interesting to note that we found mostly common ground among Coloradans as they supported agriculture in the state: these questions were an exception where there was some difference of opinion on certain production practices.



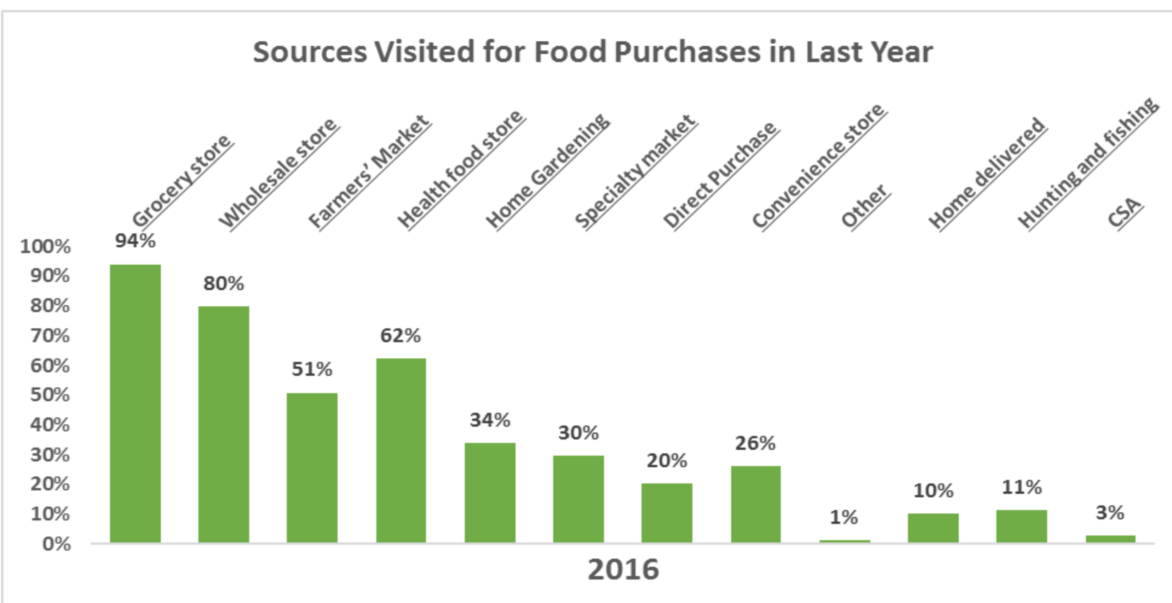

12) Given the visibility of food safety outbreaks over the past decade, it is not surprising that perceptions of safety have changed. 29% of respondents said that food produced by Colorado farmers and ranchers was almost always safe, while 54% said it was usually safe. This is a decrease in confidence over the decade since 2006 where 56% said their food was almost always safe; however, over 80% choosing usually safe or higher is still encouraging news for the industry, particularly in an era where news on outbreaks and public critique of oversight can be escalated by social media and online news.



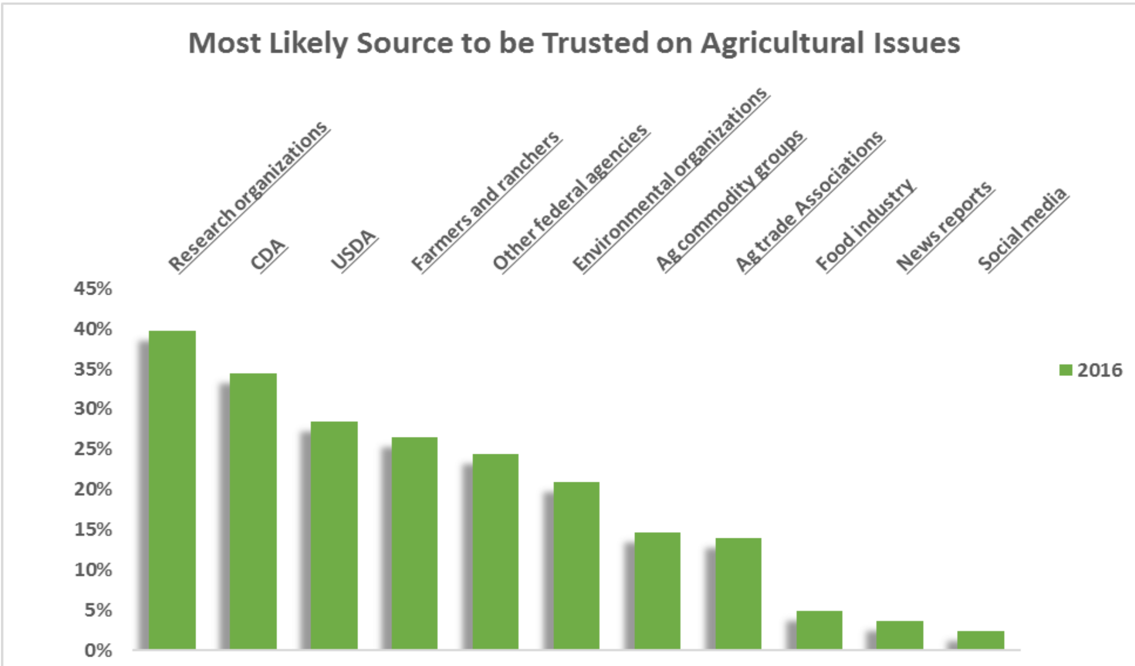
13) To help determine the level of confidence Colorado citizens have in key food system players, we asked perceptions of the following food establishments in terms of the potential for human, food-borne illness. Confidence about the safety of these outlets was high.




14) To see how access to Colorado food products influenced attitudes, this survey explored the popularity of different food markets and away-from-home food businesses among Coloradans. It should be noted that grocery and wholesale stores are still the dominant source of food purchases, but specialty markets, health food stores and home deliveries are making inroads. Plus, many survey respondents are engaging in direct market purchases of food. For example, 51% have purchased food from a farmers' market, and 23% have made food purchases directly from a farm or ranch (direct purchase and CSA shares). Another interesting change the survey began to track in 2016 is the share of Colorado households gardening (34%) and/or hunting/fishing (11%) for some of their own food.



15) When given a list of sources where they might receive information about agriculture, respondents indicated that they were most likely to trust information from university and research organizations, followed by the Colorado Department of Agriculture, United States Department of Agriculture (USDA), and then farmers and ranchers themselves. Given the increased scrutiny of food systems and policy alternatives, this confidence may be an important consideration of the role which these institutions and organizations play in shaping future discussions related to ag literacy, policy and public relations.




16) An opportunity for education on agricultural issues is agritourism. When asked about agritourism visits, 14% had participated in the past year, and 24% intended to in the future. When asked about the motivation for participating in farm education activities, direct purchases were the most common response, but unique aspects of agriculture and support for its farmers were also noted by many.