Ontario Farm Animal Council
Canadian Food & Farm Issues Study 2009
OFAC Strategy – Coles Notes

• Coalition for animal agriculture proactively working together ~ addressing questions to ensure consumer confidence.

1. Identify, monitor and respond to issues.

2. Work with industry partners to do the right thing.

3. Tell people about it.
Overall Purpose of Study

- Understand consumer attitudes toward food and farming overall and livestock farming specifically
- To identify and track issues of concern for the agri-food sector to develop effective strategies and communications.
- The study was fielded between February 20th and February 26th, 2009.
- Based on the total sample of 1,194, maximum statistical margin of error is +/- 2.84% at the 95% confidence interval.

Understanding to what extent these three core issues influence consumer perceptions:
When consumers are asked for their own personal concerns relating to farming, specific responses are fragmented. When we analyze the fragments by theme, the predominant concerns of the Canadian public are:

- Related to the Economy
- Food Safety

### Economic Issues

- **Sustainability and Profitability of Farming**: 24%
- **Cost to the Consumer**: 18%
- **Food Safety**: 17%
- **Environment**: 6%
- **Diseases**: 2%
- **Government Regulations**: 2%
- **Animal Welfare**: 2%

Base: All respondents: n=1194

Q2. Still thinking about Canadian farming overall, what things, if any, are of concern to you personally?
Overall Impression of Canadian Agriculture
Non-farming Canadian Adults

Q3. What would you say is your overall impression of Canadian agriculture today? Would you say your impression is...

- Very positive: 10%
- Somewhat positive: 42%
- Neither positive nor negative: 29%
- Somewhat negative: 13%
- Very negative: 2%
- Don't Know: 4%

52% of non-farming adults have a positive impression of Canadian agriculture.

- 42% in 2006
- Those more likely to have a positive impression of agriculture include:
  - Men
  - Higher Socio-economic Status

Base: All respondents: n=1180
When asked to identify the “most important” issue to them personally, consumers overwhelmingly select “the safety of meat, milk and eggs”.

- The safety of Canadian meat (including poultry), milk and eggs: 57%
- The care and treatment of animals on farms: 14%
- Maintaining a financially healthy livestock farming industry in Canada: 11%
- The use of antibiotics in animals raised for food: 7%
- Genetic engineering in livestock farming: 6%
- The environmental impact of livestock farming: 5%

Base: All respondents: n=1194
<table>
<thead>
<tr>
<th>Statement</th>
<th>2006</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Believe there are enviro rules in place for Canadian livestock farms</td>
<td>67%</td>
<td>70%</td>
</tr>
<tr>
<td>Personally concerned about water contamination risks from livestock</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>farms</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Believe Canadian livestock farming industry is actively looking to</td>
<td>59%</td>
<td>58%</td>
</tr>
<tr>
<td>improve enviro practices</td>
<td>59%</td>
<td>59%</td>
</tr>
<tr>
<td>Livestock farmers adhere to enviro rules set by the govt/industry</td>
<td>45%</td>
<td>41%</td>
</tr>
<tr>
<td>regulators</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Canadian livestock farming is more enviro friendly than livestock</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>farming in other countries</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Personally concerned about the strong/ unpleasant odour produced by</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>livestock farms</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>Believe farmers should be able to use manure as fertilizer for crops</td>
<td>16%</td>
<td>65%</td>
</tr>
<tr>
<td>Larger livestock farms are more enviro responsible than smaller farms</td>
<td>16%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Although in 2009 Canadians are less likely to believe there are environmental rules in place for Canadian farms, concern regarding water contamination and odour has declined significantly.

Q20. Please indicate your level of agreement with each of the statements listed below. Base: All Respondents – 2009 n=1194; 2006 n=1180 (Agree Summary – Top 2 Box)
Summary of Key Findings
- Communications & Spokespeople
Only 6% of non-farming Canadians indicate they feel they know a lot about Canadian farming practices. While 42% indicate they “know a little”, 52% indicate they know “very little” or “nothing”.

Base: All respondents: n=1194
For consumers, traditional media is the primary conduit for information related to these topics.

- Television: 71%
- Newspaper: 57%
- Internet: 43%
- Radio: 40%
- Friends/Family/Word of Mouth: 36%
- Grocery store/food retailer: 32%
- Magazines: 31%
- Government or Government Agencies: 24%

Base: All respondents: n=1194

Q15. Listed below are a number of potential sources for information. Please indicate from which of the following sources, if any, you have read, seen or heard information about food safety, environmental issues and/or animal welfare during the past 12 months.
50% of Canadians have a “warm/favourable impression” of farmers or ranchers, higher than any other group or individual tested. Given the branding of several key animal rights groups, it is important to note that “Humane Societies” are also generally regarded with a “warm/favourable impression”.

<table>
<thead>
<tr>
<th>Group</th>
<th>2009</th>
<th>2006</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmers or ranchers</td>
<td>51%</td>
<td>50%</td>
<td>1%</td>
</tr>
<tr>
<td>University scientists working to improve food/farming</td>
<td>48%</td>
<td>47%</td>
<td>1%</td>
</tr>
<tr>
<td>Humane Societies</td>
<td>47%</td>
<td>48%</td>
<td>1%</td>
</tr>
<tr>
<td>Environmentalists</td>
<td>35%</td>
<td>32%</td>
<td>-3%</td>
</tr>
<tr>
<td>Animal rights activists</td>
<td>21%</td>
<td>22%</td>
<td>1%</td>
</tr>
<tr>
<td>Meat and poultry processors</td>
<td>18%</td>
<td>18%</td>
<td>0%</td>
</tr>
<tr>
<td>Government agencies related to food/farming</td>
<td>18%</td>
<td>16%</td>
<td>-2%</td>
</tr>
<tr>
<td>Medical researchers who use animals to develop medical procedures/drugs</td>
<td>14%</td>
<td>17%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Believability of Spokespeople on Environmental Issues
Non-Farming Canadian Adults

Al Gore
Very/Somewhat Believable: 37%
Very/Somewhat Unbelievable: 25%

A Farmer or Rancher
Very/Somewhat Believable: 52%
Very/Somewhat Unbelievable: 9%

David Suzuki
Very/Somewhat Believable: 63%
Very/Somewhat Unbelievable: 11%

A key asset of agriculture!
So What?
Canadians want to know about food & farming

• **Strengths & Opportunities:**

  • Most Canadians have a positive impression of farming and trust farmers.
  
  • Almost all Canadians trust their food is safe.
  
  • Canadians trust the government.

  • The interest in knowing more about food and farming is at an all time high.
Canadians want to know more about food and farming

Our challenges:

• Safe food is still THE most important issue.

• Popular media is the main source of information.
  • What makes the news?
  • It takes money to have a strong media presence.

• Internet growing in popularity – are we there yet?

Where is the agri-food sector’s voice?
The Executive Summary of the study is available. Contact OFAC for a copy.

Phone: (519) 837-1326
Email: info@ofac.org

www.ofac.org