

2018 Colorado Department of Agriculture Stakeholder Survey



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Survey Overview

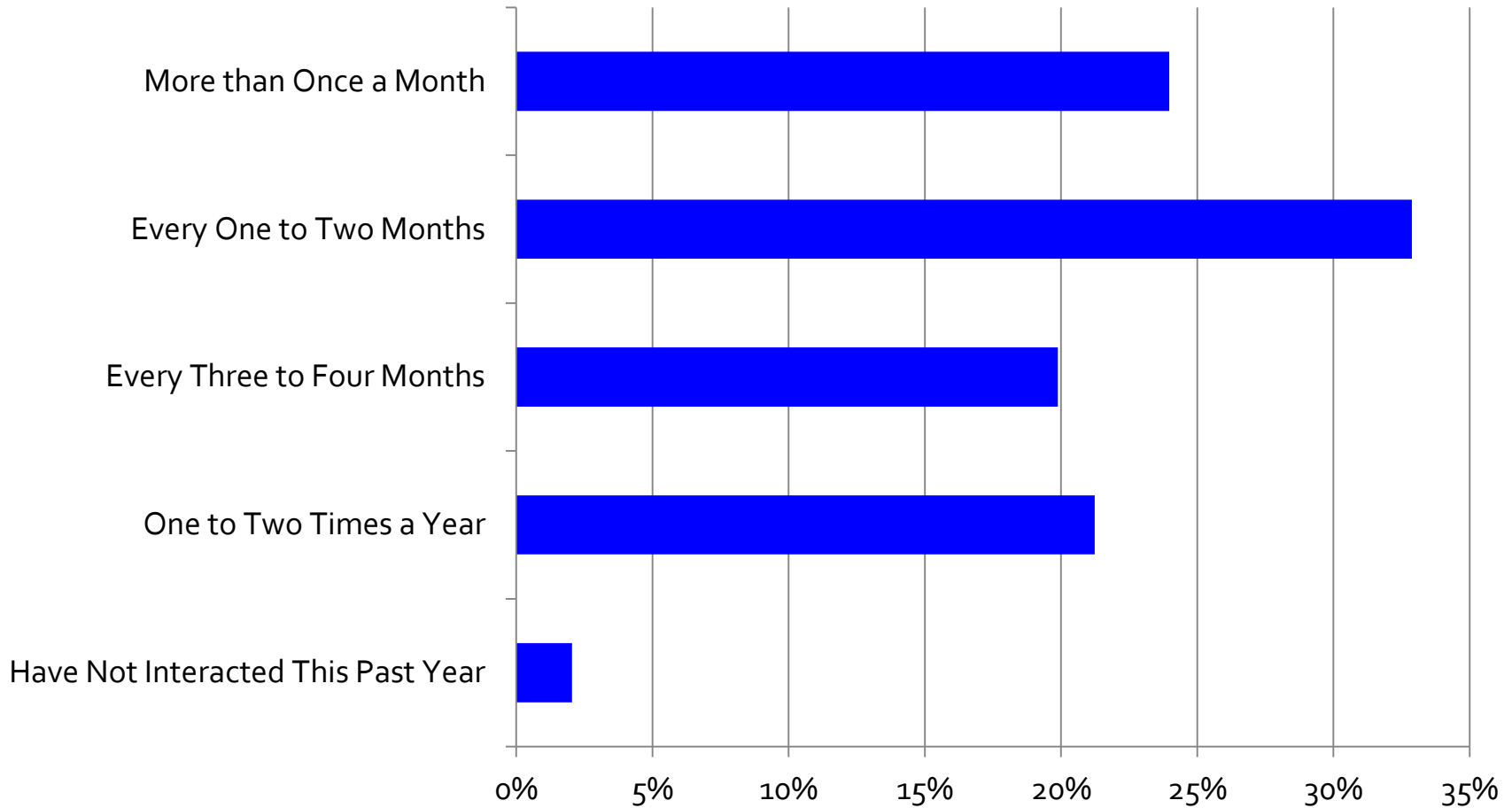
- The online survey was conducted by CDA between January 11 – 31, 2018 and generally replicated surveys conducted in 2011, 2012, 2014, and 2016.
- Survey population consisted of 406 agriculture leaders including ...
 - Members of CDA Boards, Commissions, and Advisory Committees
 - Volunteer and staff leadership of industry associations and organizations
 - CSU leadership, USDA partners, and other industry leaders
- Responses were recorded from 144 surveys
- 36% response rate.
- Margin of error is roughly 5%.

Respondents

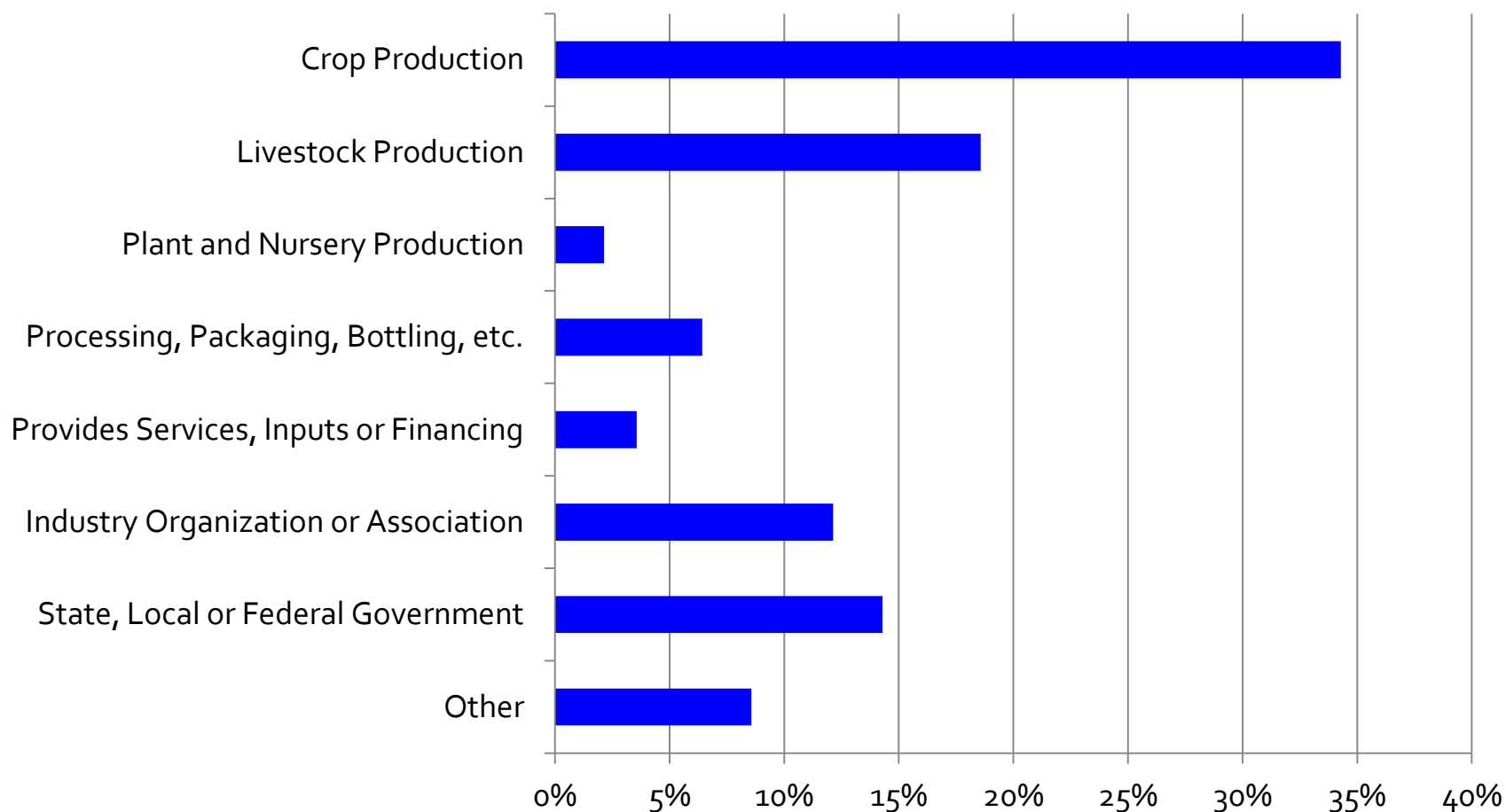


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How often the survey respondents interacted with CDA during the past year?

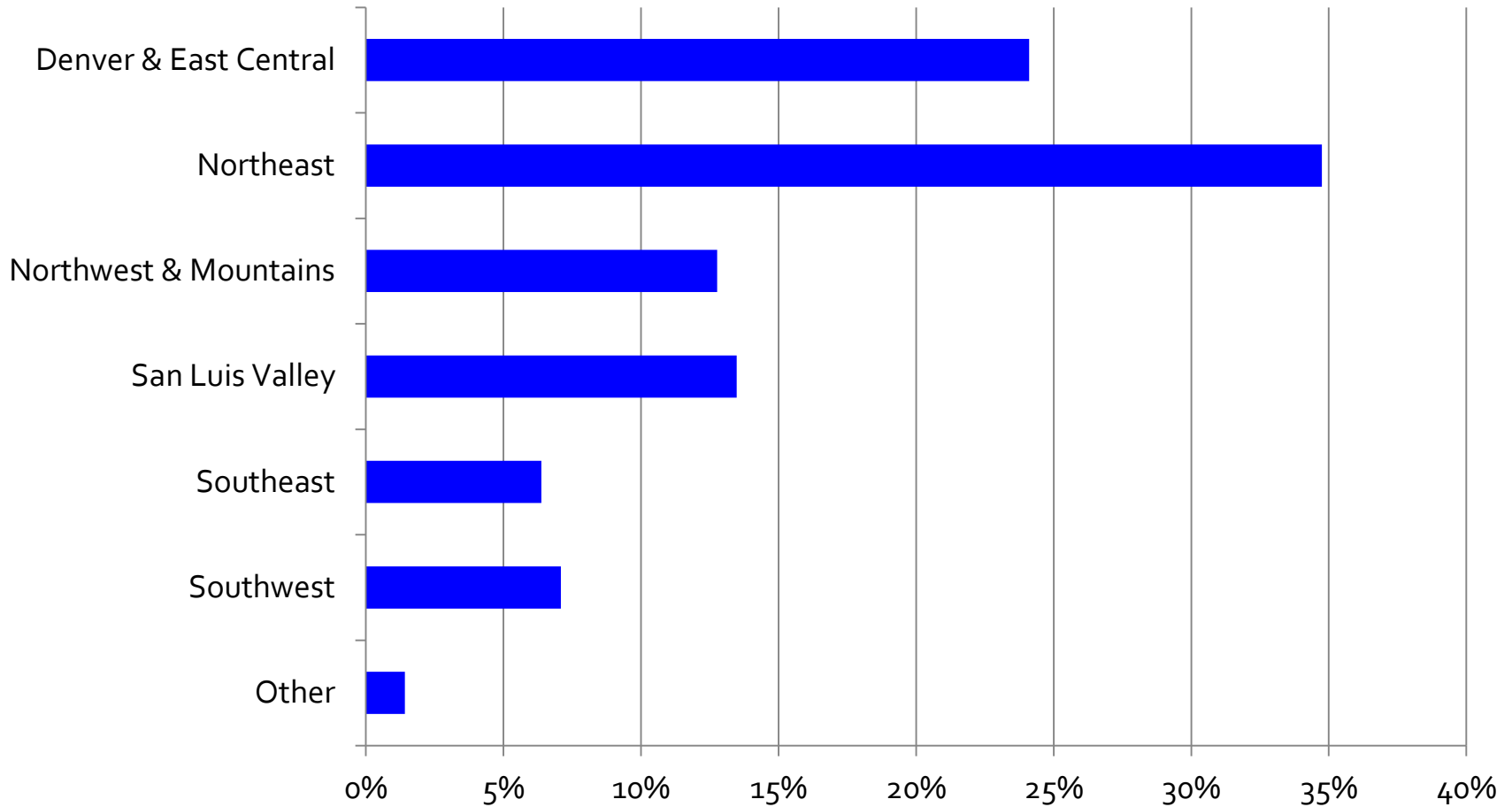


The primary source of income or work of the survey respondents?



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Where the survey respondents live?



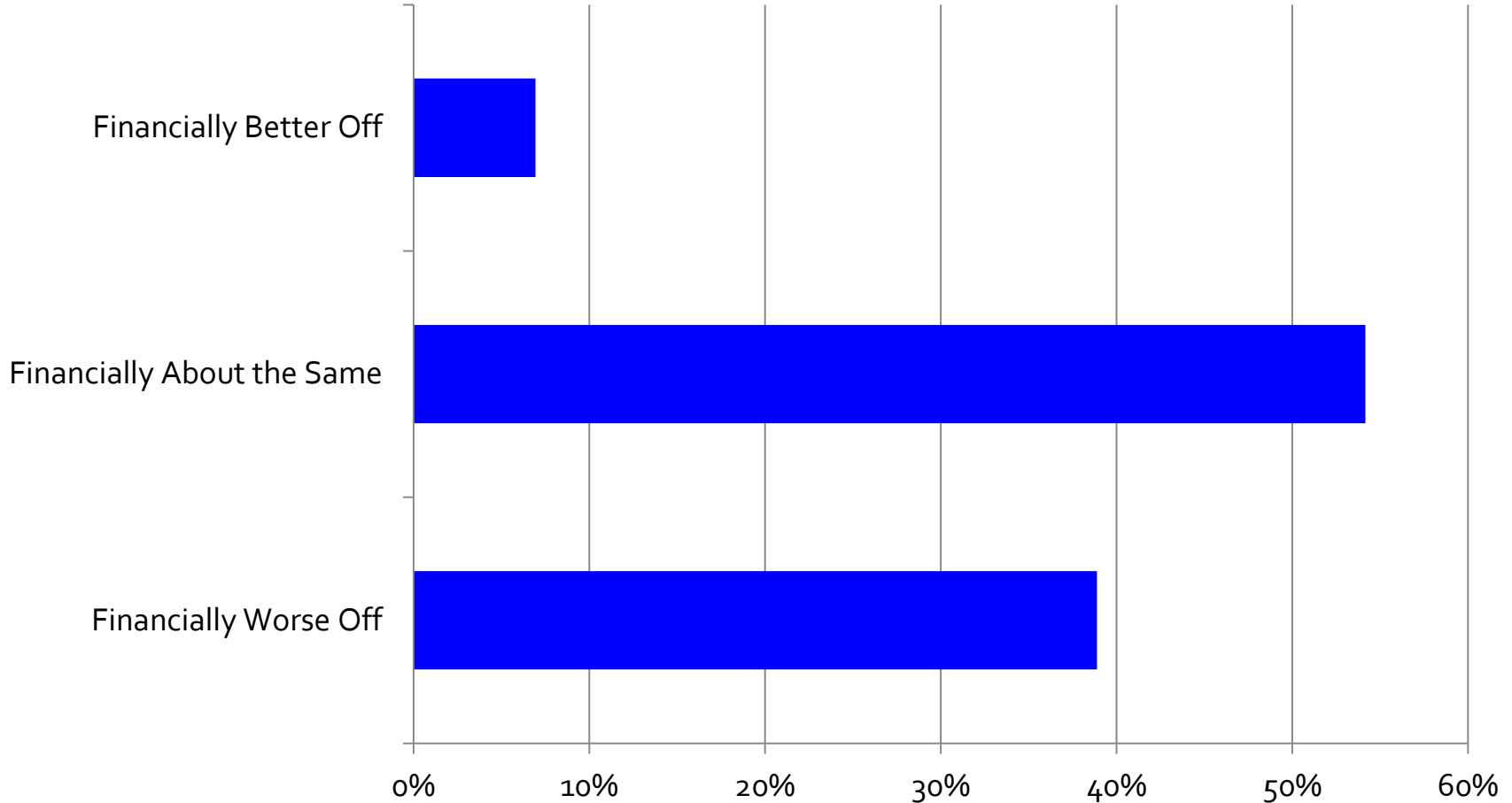
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General Outlook on Agriculture, Challenges & Opportunities, and Public Policy

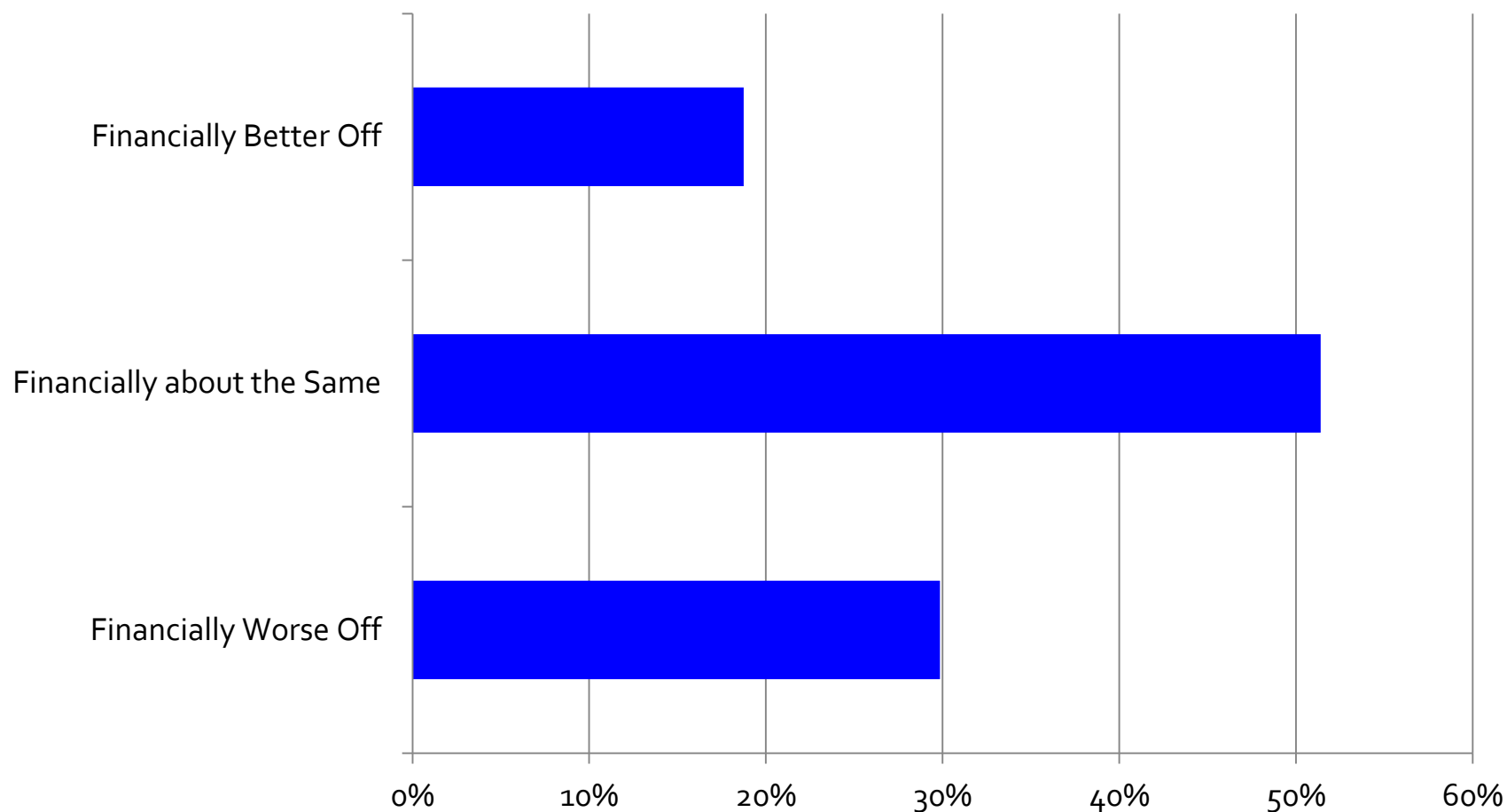


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Compared to a year ago, would you say that Colorado agriculture is ...

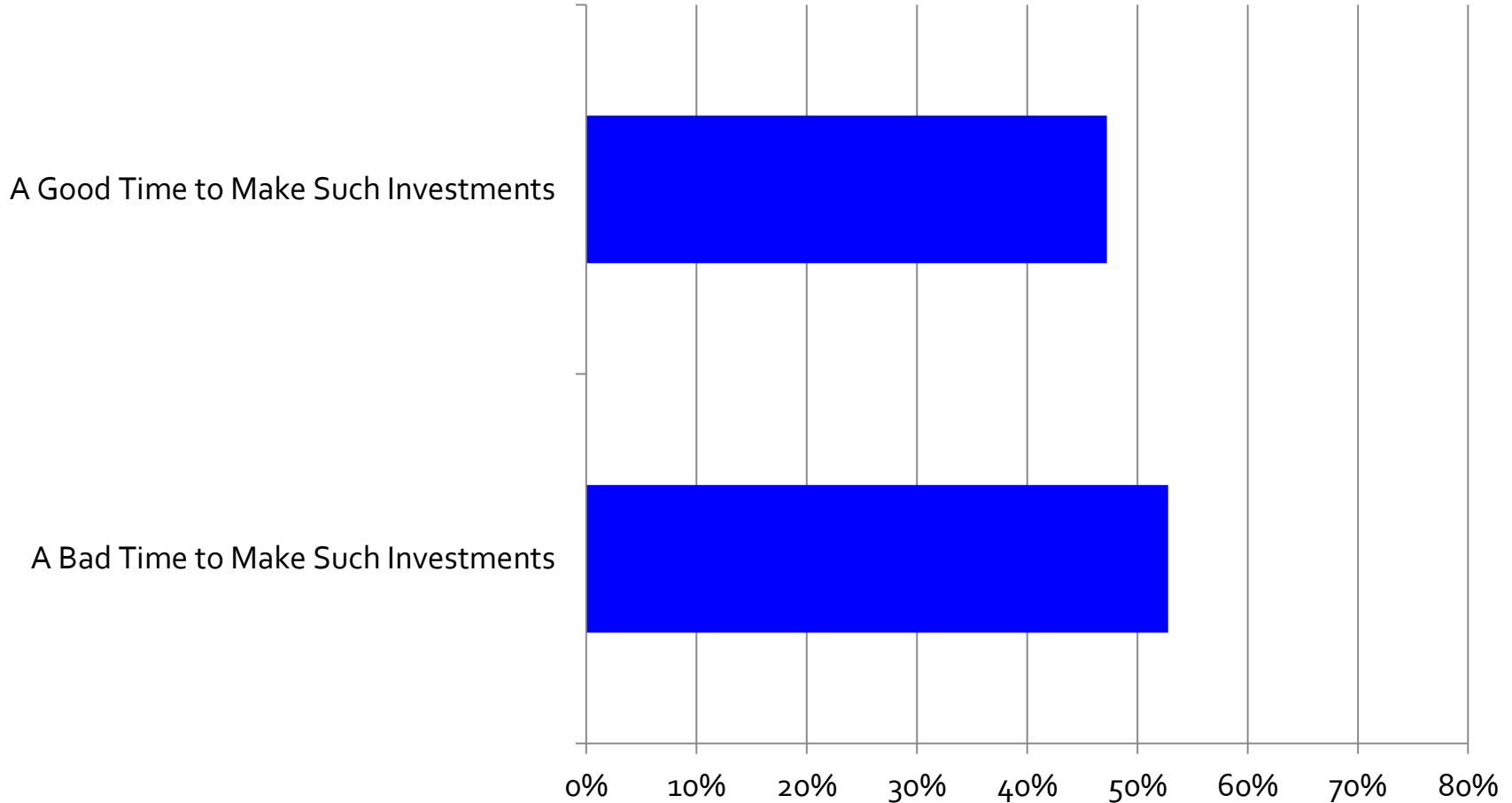


A year from now, do you think Colorado's agriculture industry will be ...



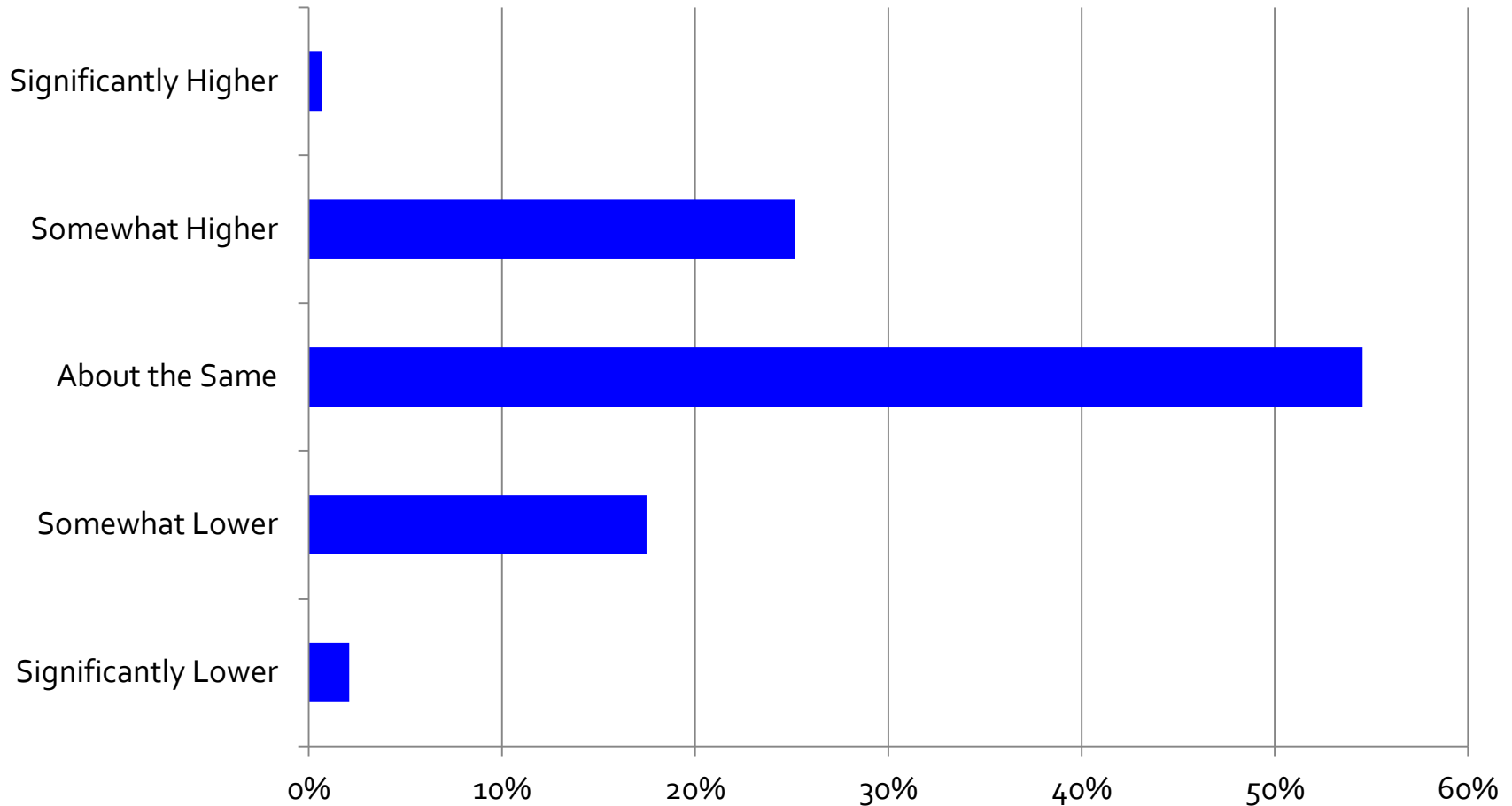
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Is now a good or bad time to make large agricultural investments such as land, buildings and machinery?



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About this same time next year, what is your expectation for prices received by Colorado farmers and ranchers?



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What issue affecting Colorado's food and agriculture industry most often keeps you up at night?

Most Mentioned Issues	# of Mentions (Unaided Response)
Farm and ranch economics (low prices, high input costs, shrinking margins, ability to get credit, etc.)	45
Water (availability, buy and dry, loss to municipalities, etc.)	36
Government (increasing regulation, public lands issues, taxes, etc.)	21
Labor (lack of workers, immigration policy, higher costs, etc.)	18
Weather (climate change, variability in weather, drought, etc.)	15
Loss of agricultural land (development, etc.)	10
Global trade (uncertainty surrounding trade agreements and impact on markets, imports, etc.)	10
Activism (anti-GMO, non-ag interests trying to drive ag policy, etc.)	8
Lack of public understanding of agriculture	7



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Top 10 challenges/threats to the long-term sustainability and profitability of Colorado's food and agriculture value chain?

Challenge/Threat	Rating (4 = Very Significant)
Availability of Water/Loss of Use	3.88
General Farm Economics	3.66
Labor	3.59
Lack of Connection to and Understanding of Agriculture by the General Public	3.58
Regulatory & Environmental Policies Impacting Agriculture	3.52
International Trade Policy	3.44
Development and Loss of Agricultural Lands	3.36
Lack of Public Investment in Ag Sciences and Applied Research	3.35
State/U.S./Global Economy	3.31
Lack of Investment in Rural Infrastructure	3.30



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Others included: Ag Credit (3.21); Food & Ag Imports from Other Countries (3.19); Food Safety (3.16); Activism (3.10); Food Security (3.05); Climate Change (2.70); and Federal Lands Ownership (2.69)

Where do you currently see the greatest opportunity for Colorado's food and agriculture industry?

Most Mentioned Issues	# of Mentions (Unaided Response)
Development of new, alternative, and specialty crops	25
Development and promotion of local markets, more direct to consumer marketing, local food systems, etc.	23
Global trade and growth of exports	19
Innovation, new technology, R&D, and value-added development	16
No opportunities exist	8
Development and growth of industrial hemp and cannabis sectors	8
Public education (tell our story, ag literacy, where our food comes from, role ag plays in economy, etc.)	7



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Top 10 opportunities to enhance the long-term sustainability and profitability of Colorado's food and agriculture value chain?

Opportunity	Rating (4 = Very Significant)
Additional/New Water Storage	3.68
Consumer and Public Education about Agriculture and Food	3.53
Development of More Water-Efficient/Drought Tolerant Crops	3.50
Trade Development and Export Promotion	3.46
Precision Agriculture/New Technologies	3.31
Development of Value-Added Agricultural Business Ventures	3.30
Natural Resources Conservation	3.13
Promotion of Local Foods and Local Food Systems	3.12
Advancement of New and Alternative Crops	3.08
Biotechnology/GMOs	3.08



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Others include: Advancement of Ag-Based Energy Efficiency and Renewable Energy Technologies (3.06); Promotion of Animal Health and Livestock Disease Traceability (3.03); and Organic Production (2.45)

What new programs, policies or initiatives should be enacted at the State level to help advance Colorado's rural communities and food and agriculture industry?

Most Mentioned Programs, Policies or Initiatives	# of Mentions (Unaided Response)
Less government regulation	22
Public education about agriculture	12
Support for new and beginning farmers and ranchers	10
Economic development (business recruitment, incentives for youth and veterinarians to return/locate in rural areas, technical support, etc.)	10
Rural infrastructure development (roads, bridges, broadband, etc.)	7
Water (new storage, agreements so Colorado keeps more water, etc.)	6
Trade development and export promotion	5
Political support/advocacy of agriculture industry	5
Immigration policy reform and help to secure labor needs	4
Public investment in land grant universities and public research	4



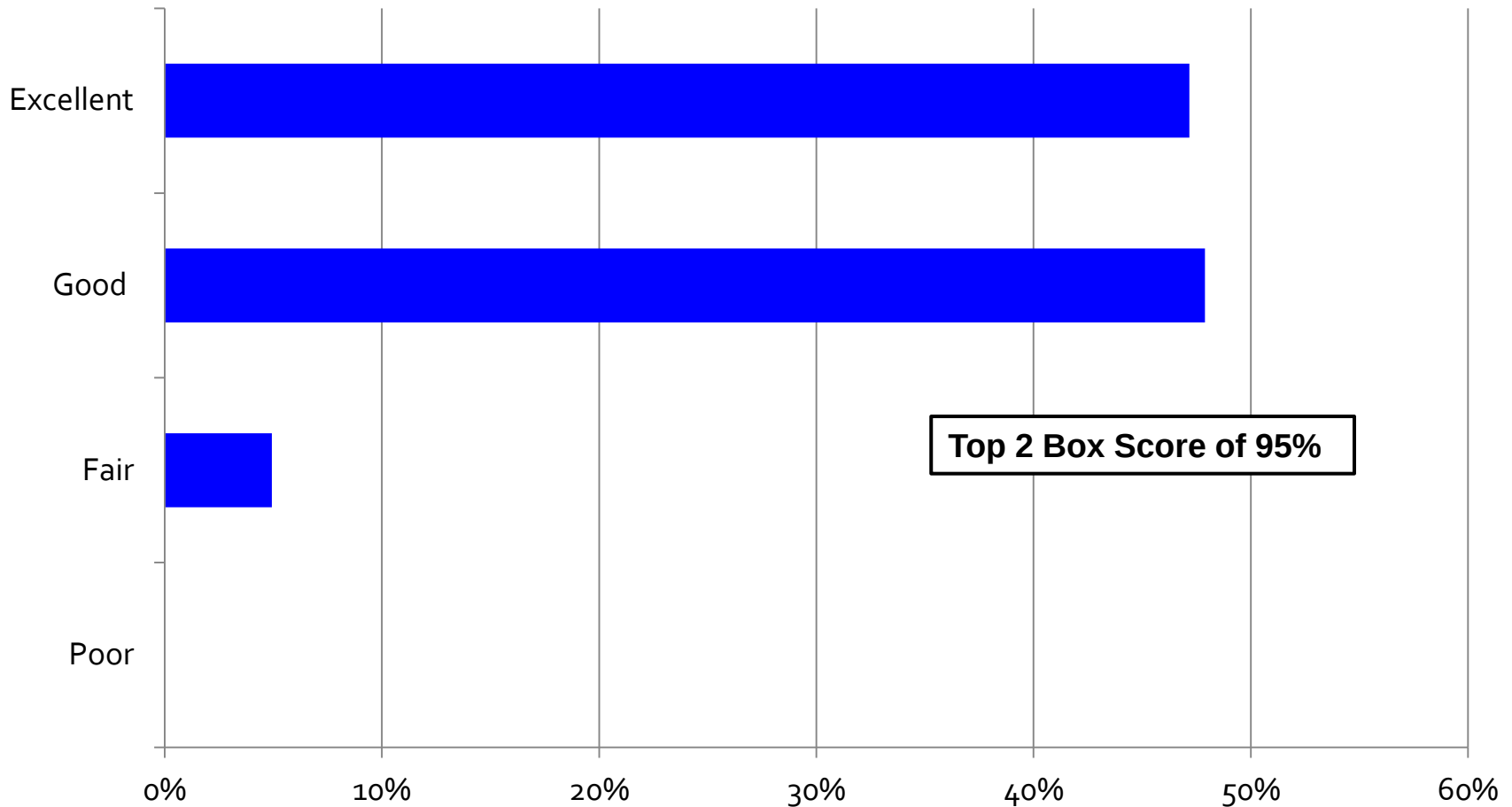
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Stakeholder Experience



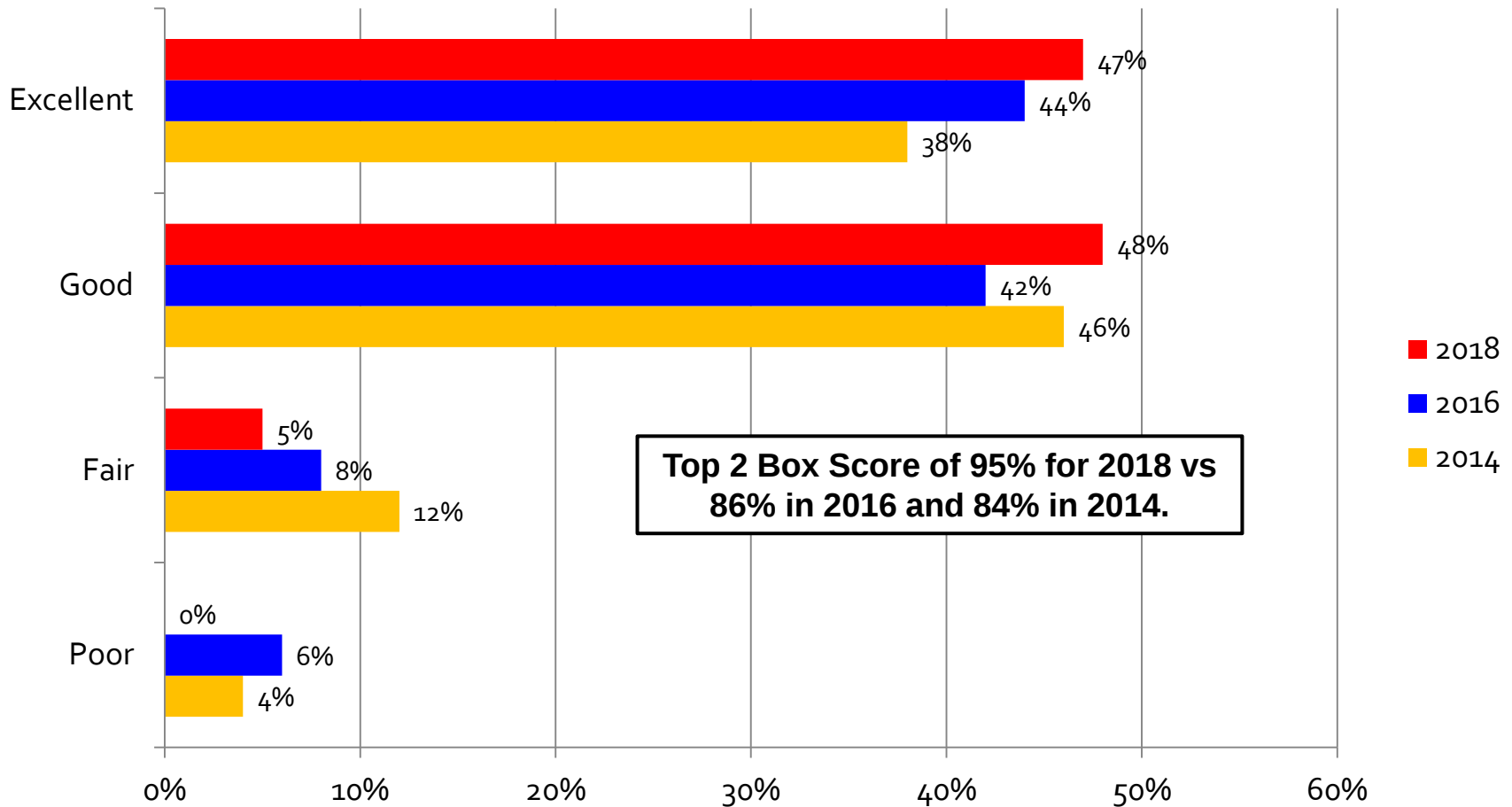
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How would you rate your overall experience interacting with CDA?



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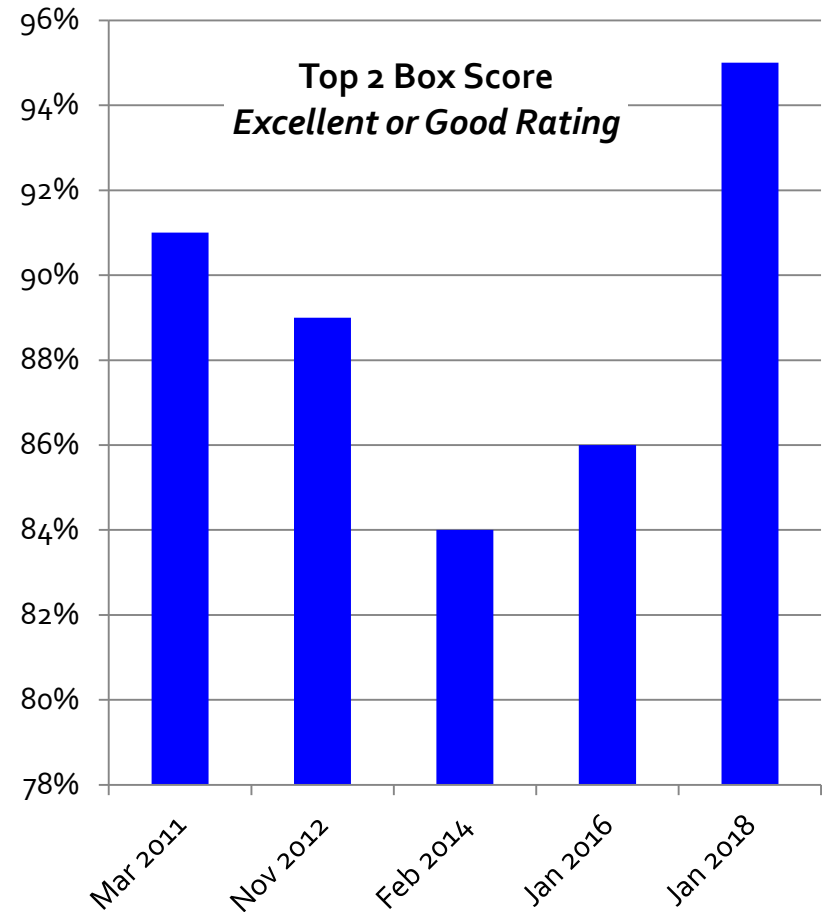


Customer Satisfaction

-- A Comparison to Prior Years --

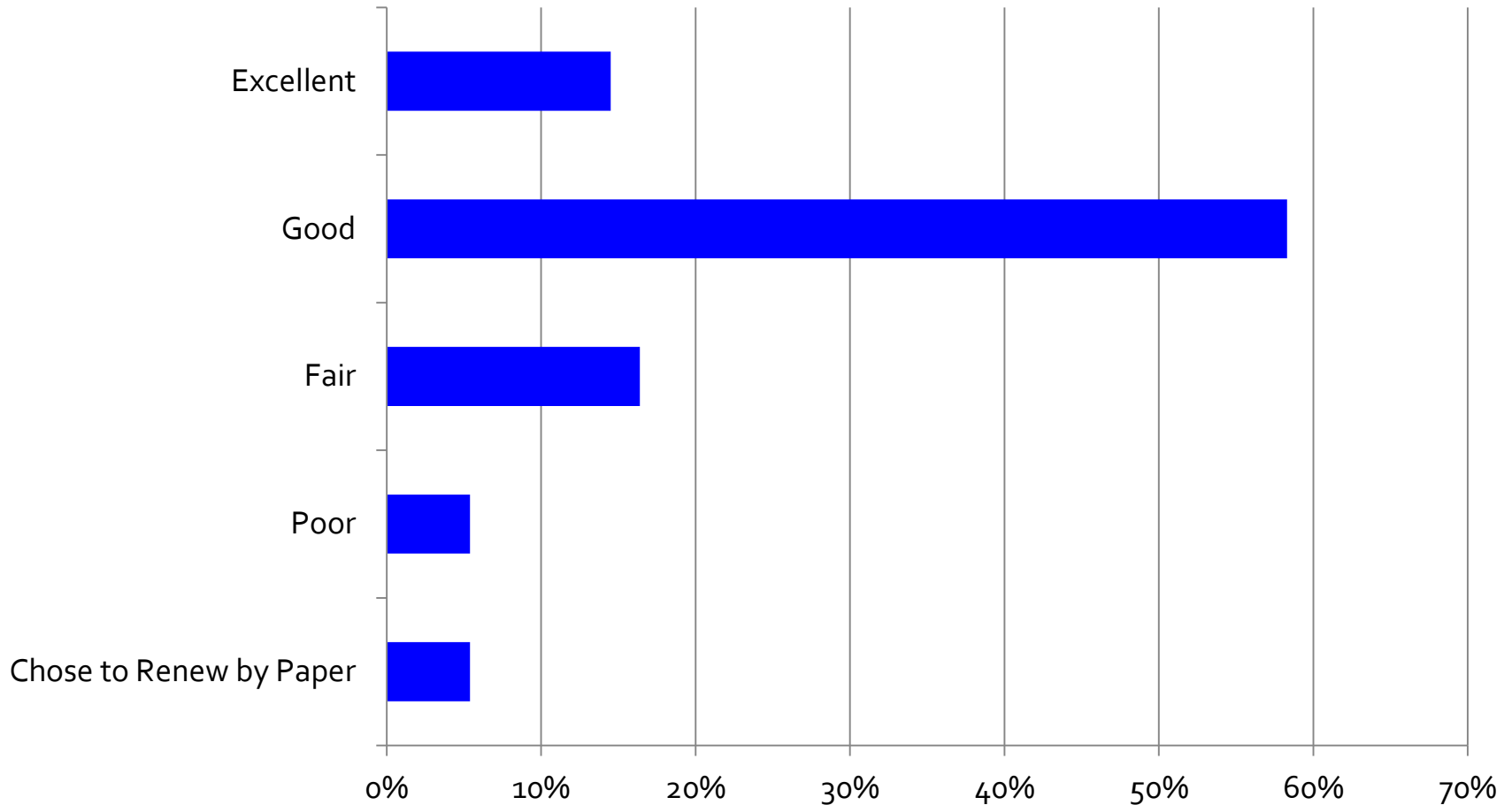
Survey Date	Sample Size	Total Responses	Response Rate	Top 2 Box Score
Mar 2011	345	150	44%	91%
Nov 2012	353	118	33%	89%
Feb 2014	347	121	35%	84%*
Jan 2016	424	155	36%	86%
Jan 2018	406	144	36%	95%*

* Denotes statistical significance from the previous data point.



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Rating of respondents reporting experience with AgLicense

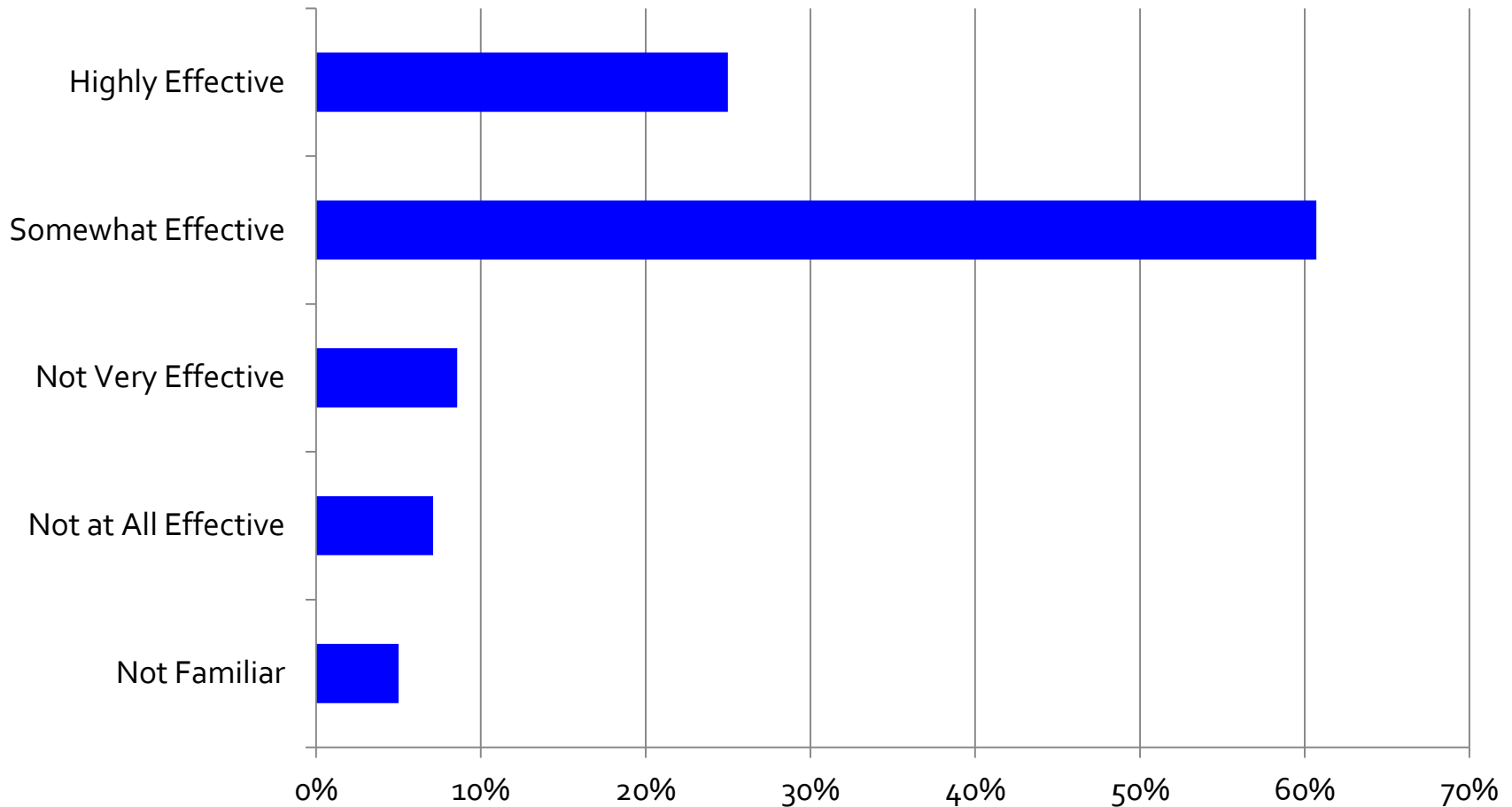


Colorado Proud



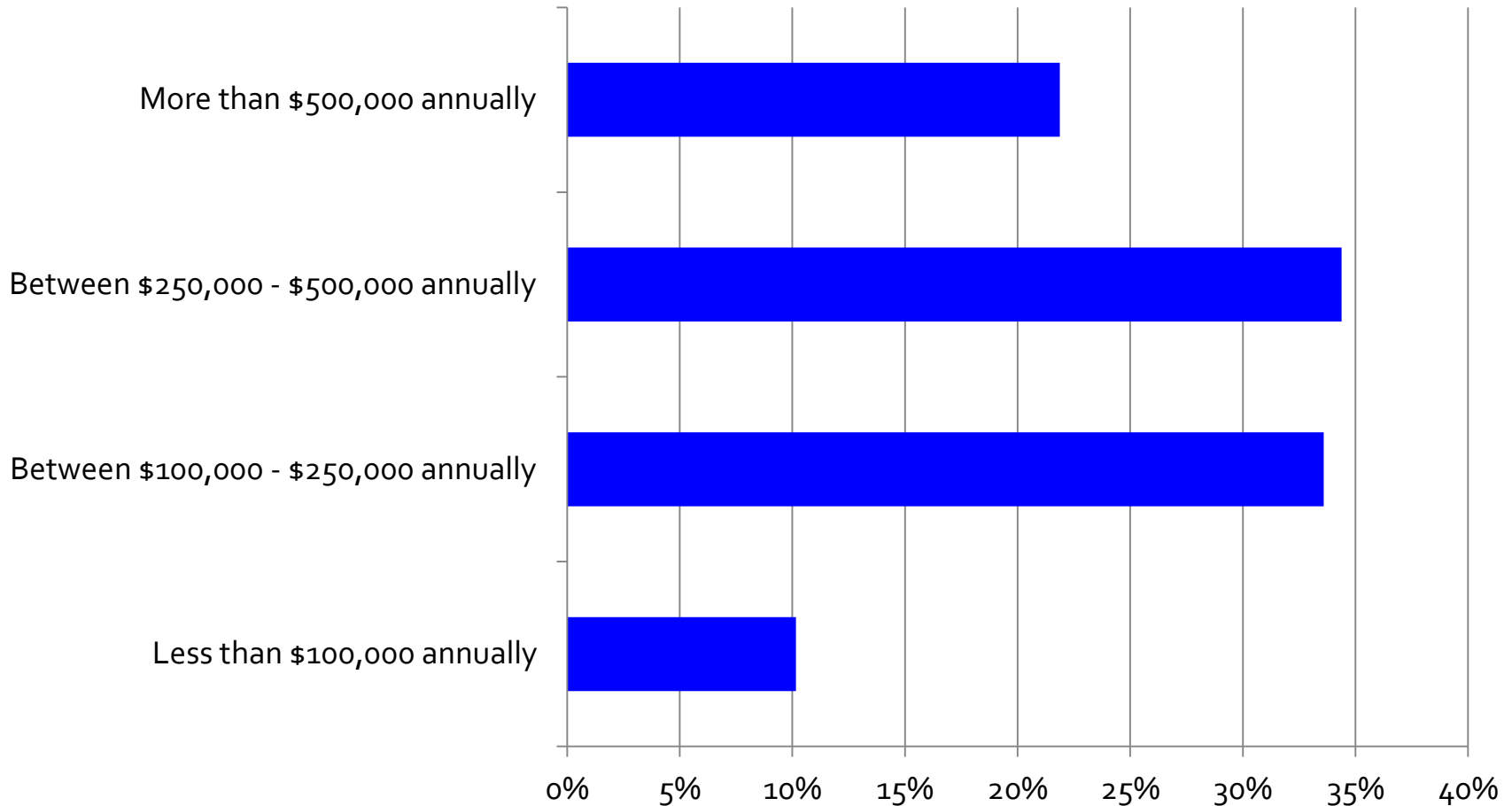
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How do you rate the effectiveness of “Colorado Proud” in informing consumers about agriculture and the food and ag products grown, raised or processed in Colorado?



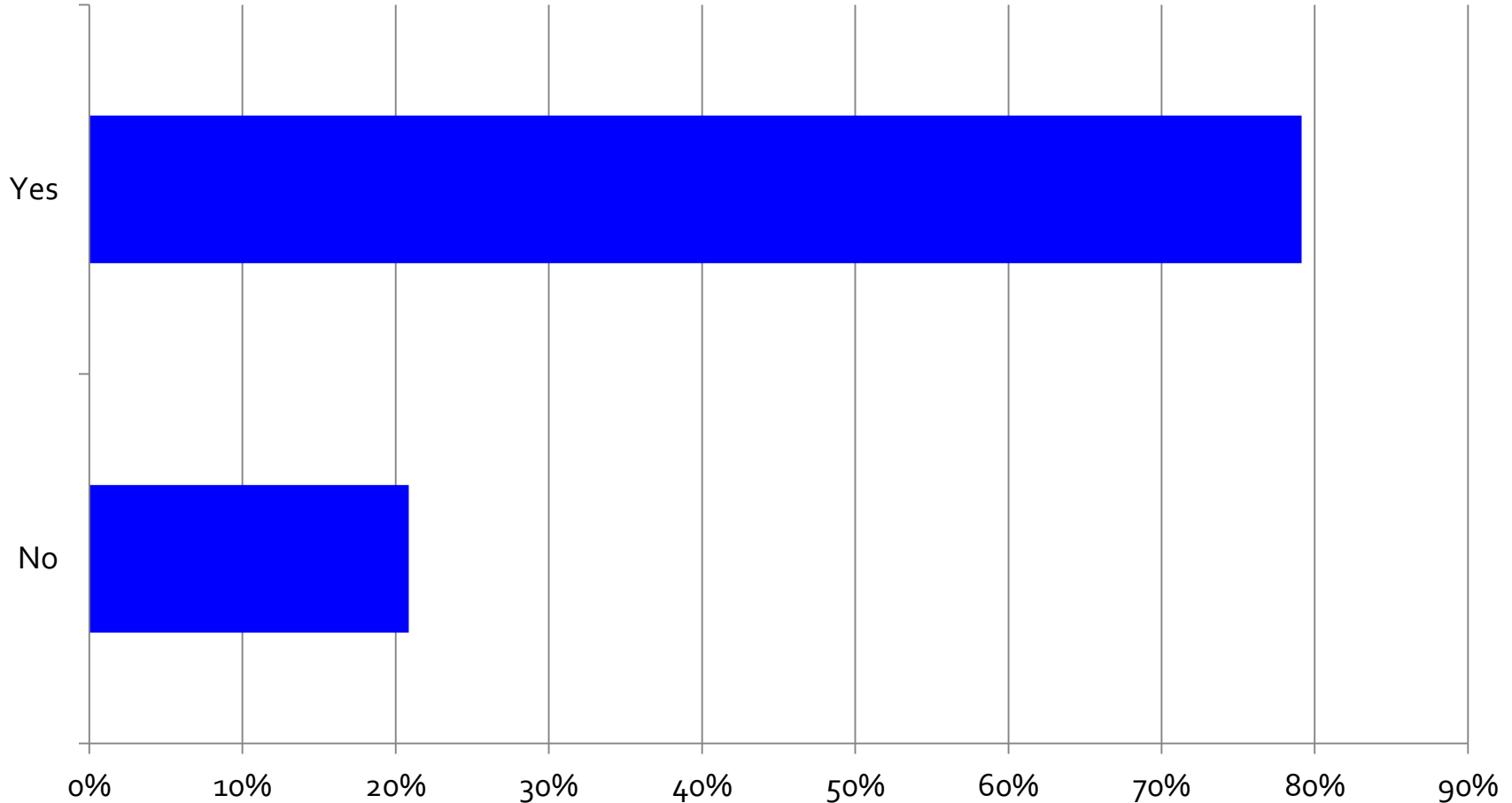
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What do you generally expect the advertising and promotion budget for a statewide program like “Colorado Proud” to be?



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Should there be a state General Fund appropriation for the “Colorado Proud” program?



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For More Information:

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Photo courtesy of Dee Jensen & 2016 AgInsights Photo Contest



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