

ORGANIC FARMING INSTITUTE OF BRITISH COLUMBIA

SURVEY OF FARMS - 2007

Survey Highlights

Based on a survey of 355 farms across four BC farming regions:

- ☞ 10% of farms are certified organic
- ☞ 37.7 % of conventional farmers said they are “likely” or “very likely” to switch to organic farming methods
- ☞ conventional farmers recognize the environmental benefits of organic farming about half as often as organic farmers; but conventional farmers are far less likely to see economic advantages of organic farming
- ☞ about one out of three farmers said they are “likely” or “very likely” to take at least one course, if offered according to the OFI model
- ☞ 63.8% of farmers said a field component is “very important” or “essential”.
- ☞ a significant segment of the potential market finds distance from the Institute a barrier to enrolment
- ☞ the cost and length of courses outlined in the OFI business plan are acceptable to a majority of farmers
- ☞ course credit and certification are not important to the majority of farmers.

Introduction, Purpose, Scope

The Organic Farming Institute of British Columbia (OFI) prepared a business plan in 2005 for the purpose of establishing an Institute for training farmers, householders and agricultural students in practical methods of organic farming. Among key client cohorts identified were the conventional and organic farmers of British Columbia. Financial forecasts, based on anticipated numbers of student farmers, were made. Nonetheless, the business plan called for a survey of farmers, in order to strengthen the reliability of enrolment and financial forecasts.

A second reason for conducting a survey emerged when the OFI applied for funding of curriculum development to the Organic Sector Development Program (OSDP). Directors of the OSDP requested that the OFI conduct a market survey prior to development funding being granted. The OSDP offered to fund 50% of the survey costs. Additional funding came from foundation grants.

The purposes of the survey were to:

1. provide market data for business planning;
2. determine potential market size by type of farm production;
3. determine potential market size in the conventional and organic sectors;
4. identify perceptions about the advantages and disadvantages of organic farming;
5. identify potential demand for specific course types;
6. determine level of satisfaction with the training delivery model;
7. test market the proposed course price point.

Rural Futures was contracted to conduct the survey. Logistical considerations and available funding (\$15,000) contributed to determining the scope of the survey. The OFI required a survey that extended across BC's major farming regions. Four farming regions were selected on the basis of high concentrations of farms and wide varieties of crops and livestock grown in those regions.

	<u>Region</u> ¹	Sample Numbers <u>Proposed</u>	Sample Numbers <u>Actual</u>
1	Vancouver Island	100	78
2	Fraser Valley	125	128
3	Okanagan –Similkameen	100	100
4	South Columbia Valley	<u>75</u>	<u>49</u>
	Total	400	355

On both Vancouver Island and in the South Columbia Valley, extensive efforts to administer surveys did not result in reaching target sample sizes. In both regions, many farms have gone out of production. Former farms are owned by re-located urbanites. Frequently, the new occupants raise horses. While it would have been possible to meet the sample size targets, the cost of doing so was very high. Importantly, the number of surveys gathered reflects the relative number of working farms in each region. Sample sizes are large enough to be representative of individual regions. A total of 355 randomly collected surveys is an adequate sample size to reliably represent farmers across southern British Columbia.

The main means of sampling was an on-farm interview. Farms were chosen randomly. Some surveys were obtained at the Okanagan's Spring Bloom and at farmer's markets on Vancouver Island, in the Fraser Valley and South Columbia Valley. Farmers at those survey points were selected randomly.

Surveyors followed a code of conduct that was designed to eliminate potential bias in the selection of respondents or in their responses. Respondents were not told what the survey was about prior to agreeing or refusing to participate. Surveyors were coached on how to avoid influencing responses.

In general, farmers were willing to complete the survey. In the Fraser Valley (where 93% of surveys were done at the farm), about 10% of farmers refused to participate.

¹ Vancouver Island region: Saanich Peninsula, Cowichan and Comox Valleys, Salt Spring Island. Fraser Valley Region: throughout. Okanagan – Similkameen Region: Vernon to Osoyoos with heaviest representation south of Kelowna; Lower Similkameen Valley. South Columbia Valley Region: 50 kilometre radius from Creston.

Survey Results

Table 1 shows the average farm size by region and type (organic and conventional). Organic farms are smaller than conventional farms on average in all regions, except the S. Columbia². Organic farms are largest in the Fraser Valley (when the 400 acre anomaly is removed from the S. Columbia) and smallest in the Okanagan – Similkameen.

Table 1: Average Farm Size (acres)

Region	Organic	Conventional	Combined	Total Farms
1	28.9	34.2	33.0	78
2	38.5	116.1	106.9	128
3	10.4	16.0	15.5	100
4	116.5	73.3	77.1	49
All Regions	37.7	63.6	60.7	355

Table 2 shows the number of farms by product type across the four regions and the average size of farms, by product grown, for each region. This table may be used to evaluate the number of potential clients for different course types, according to farm product. Most farms grow more than one crop type, and so total number of farms exceeds the sample size. The number of farms in each product category for each region can be calculated, if desired.

Table 2: Farms by Product and Size³

Product	Average Farm Size (acres)									
	Organic Farms					Conventional Farms				
	1	2	3	4	No.	1	2	3	4	No.
Ground Crops	58.3	84.6	75.0	75.0	27	45.5	61.3	16.9	26.8	124
Greenhouse for starting ground crops	33.3	46.2	37.5	50.0	15	30.3	2.7	5.6	9.8	32
Greenhouse production for market	41.7	23.1	12.5	0.0	9	22.7	5.4	2.2	4.9	25
Greenhouse prod. for farmers	0.0	0.0	12.5	0.0	1	1.5	0.0	0.0	0.0	1
Greenhouse prod. for gardeners	0.0	7.7	0.0	0.0	1	7.6	0.9	3.4	4.9	11
Tree fruit production	75.0	23.1	87.5	50.0	21	39.4	4.5	83.1	51.2	126
Livestock production	25.0	30.8	25.0	25.0	10	21.2	22.5	3.4	26.8	53
Grains	0.0	0.0	0.0	25.0	1	7.6	1.8	1.1	4.9	10
Grapes	0.0	0.0	12.5	0.0	1	12.1	0.9	14.6	17.1	29
Poultry (for meat)	8.3	0.0	12.5	0.0	2	12.1	6.3	0.0	2.4	16
Eggs	58.3	38.5	25.0	0.0	14	21.2	0.0	1.1	9.8	19
Berries	50.0	46.2	0.0	25.0	13	48.5	32.4	4.5	24.4	82
Back yard garden	8.3	7.7	25.0	25.0	5	27.3	4.5	7.9	12.2	35
Other	25.0	7.7	0.0	25.0	5	25.8	2.7	4.5	19.5	32

² A 400 acre organic grain and livestock farm skewed the result. The other organic farms in that region averaged 20.1 acres in size.

³ Numbers in this table will be checked by a second database technician. We do not have full confidence in them at this time.

Table 3 shows the number and percentage of organic versus conventional farms surveyed by region. The highest frequency of organic farms was found on Vancouver Island (15.8%). Across regions, 11% of farms were organic.

Table 3: Number and Percentage of Organic versus Conventional Farms

Region	# Organic	% Organic	# Conventional	% Conventional
1	12	15.4%	66	84.6%
2	13	10.2%	115	89.8%
3	10	10.0%	90	90.0%
4	4	8.2%	45	91.8%
Total	39	11.0%	316	89.0%

Table 4 shows the number of farmers who say they use organic methods but are not certified. Most used some feature of organic farming, often integrated pest management. A few claimed to be fully organic in operation. These data point to a market sector; farmers who are inclined to organic methods, but who have not achieved certification.

Table 4: Number of Farms That Use Organic Methods But Are Not Certified

Region	No. Organic – Not Certified	% of Farms Surveyed
1	46	69.7
2	24	21.6
3	25	28.1
4	14	34.1
Total	109	35.5

Table 5 indicates how likely the conventional farming community is to switch to organic farming methods. These data give an indication of the potential market size in the conventional farming sector. The percentage indicating they are likely or very likely to make the transition is over 40% for all regions, except the Fraser Valley, where it is 25.5%. Overall, 37.5% of farmers indicated a likelihood of making the transition. The absence of an “undecided” tally may indicate polarity in views of organic farming.

Table 5: Conventional Farms Likelihood Of Transitioning To Organic

Region	Very Unlikely	Unlikely	Undecided	Likely	Very Likely	Total Conv. Farms Surveyed
1	30.0%	23.3%	0.0%	33.3%	13.3%	66
2	65.5%	9.1%	0.0%	17.3%	8.2%	115
3	40.2%	14.6%	0.0%	40.2%	4.9%	90
4	20.5%	38.5%	0.0%	35.9%	5.1%	45
All	45.0%	17.5%	0.0%	29.6%	7.9%	316

Table 6 assesses farmers’ perceptions of the advantages of organic farming methods. The percentage of farmers holding listed perceptions is calculated for each region. The top four advantages listed have to do with environmental quality. Organic farmers are strong in their beliefs

about the environmental benefits of organic farming. Conventional farmers recognize environmental advantages, too, but only at about half the ratio of organic farmers.

Table 6: Perceived Organic Farming Advantages

Advantages	% Organic					% Conventional				
	1	2	3	4	All	1	2	3	4	All
Improves soil fertility and structure	91.7	69.2	100.0	100.0	86.5	69.7	30.6	22.5	41.5	38.1
Recycles products like manure	50.0	69.2	62.5	75.0	62.2	57.6	40.5	27.0	34.1	39.4
Reduce inputs of toxic materials	100.0	84.6	100.0	100.0	94.6	74.2	40.5	47.2	48.8	50.8
Cleaner environment for farm and public	83.3	84.6	100.0	100.0	89.2	74.2	35.1	48.3	51.2	49.5
Higher market value	50.0	61.5	75.0	75.0	62.2	39.4	15.3	37.1	36.6	29.6
Immunity against price fluctuations	16.7	23.1	0.0	0.0	13.5	9.1	5.4	3.4	2.4	5.2
Ease of sales	25.0	30.8	12.5	25.0	24.3	21.2	4.5	3.4	2.4	7.5
Increases market demand for locally grown products	58.3	46.2	62.5	50.0	54.1	36.4	9.0	24.7	26.8	21.8
lower costs of farm production	8.3	7.7	0.0	0.0	5.4	10.6	3.6	4.5	9.8	6.2
greater availability of farm labour	25.0	15.4	25.0	0.0	18.9	6.1	4.5	5.6	0.0	4.6
Other	0.0	7.7	25.0	25.0	10.8	10.6	4.5	21.3	9.8	11.4

Table 7 assesses farmer's perceptions of the disadvantages of organic farming methods. The percentage of farmers holding listed perceptions is calculated for each region. Approximately 1/3 of organic farmers list unavailability of training as a disadvantage; while only about 1/5 of conventional farmers do so. High cost of production is listed by more than half of organic and conventional farmers. Half of organic farmers list labour availability as a disadvantage. The percentage of organic (24.3) and conventional farmers (21.8) listing the requirements of certification are about the same.

Table 7: Perceived Organic Farming Disadvantages

Disadvantages	% Organic					% Conventional				
	1	2	3	4	All	1	2	3	4	All
Lack training/information on organic farming	41.7	23.1	25.0	50.0	32.4	19.7	14.4	30.3	34.1	22.8
Reduces environmental quality	0.0	0.0	0.0	0.0	0.0	1.5	2.7	5.6	7.3	3.9
No market value advantage	16.7	0.0	0.0	0.0	5.4	13.6	18.0	7.9	22.0	14.7
No immunity against price advantage fluctuations	0.0	23.1	12.5	0.0	10.8	10.6	7.2	9.0	14.6	9.4
Difficulty of sales	16.7	7.7	25.0	25.0	16.2	3.0	8.1	13.5	17.1	9.8
High cost of production	66.7	46.2	62.5	75.0	59.5	54.5	64.9	56.2	63.4	59.9
Lack of labour	75.0	30.8	37.5	50.0	48.6	33.3	12.6	18.0	41.5	22.5
Unavailability of inputs	16.7	23.1	25.0	25.0	21.6	6.1	0.9	4.5	17.1	5.2
Lack of buyers	16.7	7.7	0.0	0.0	8.1	3.0	16.2	4.5	14.6	9.8
Cost of certification	50.0	7.7	37.5	25.0	29.7	56.1	9.0	21.3	22.0	24.4
Requirements - certification	41.7	7.7	37.5	0.0	24.3	50.0	2.7	21.3	29.3	21.8

difficult										
-----------	--	--	--	--	--	--	--	--	--	--

Together, Table 6 and Table 7 show the pros and cons of organic farming in the perception of the overall farming sector. This information informs the OFI’s marketing initiatives. The information is of value to organic farming proponent organizations, agricultural and socio-geographic researchers and to agriculture industry suppliers.

Table 8 provides an answer to the key business planning question: how large is the potential market for OFI courses? The question is specific to the OFI product, because respondents were given a description of the OFI course product prior to completing the survey⁴ and the wording of the question (below) reinforces presumption of the OFI delivery model.

Presuming there was a reputable institution offering good quality training courses in organic methods that met your training needs and schedule, how likely are you to take at least one course in organic farming or to send someone working for you to a course?

Results show that 66.1% of organic farmers and 32.9% of conventional farmers are “somewhat likely” or “very likely” to take at least one course. The weighted ratio combining both indicates that 34.4% of farmers surveyed showed interest in taking a course. If that ratio (roughly 1/3) is extrapolated across the roughly 20,000 farms and hobby farms of southern BC, then the OFI has a potential first market of more than 6000 student farmers. Business planning should not accept this figure as indicating the actual number of students who *will* take a course. However, the potential student farmer client base is far higher than business plan projections, even if a fraction of the survey projection number is used.

The survey indicates that interest is very high in the organic farm community; a relatively small market. Interest is fairly high in the much larger (90%) conventional farm market. The survey reveals that interest is lowest in the Fraser Valley for both farm communities.

Table 8: Likelihood Of Taking At Least One Course

Likelihood	% Organic					% Conventional				
	1	2	3	4	All	1	2	3	4	All
Regions										
Very Unlikely	25.0	23.1	12.5	25.0	21.6	19.7	68.5	43.8	31.7	45.9
Somewhat Unlikely	0.0	0.0	0.0	0.0	0.0	10.6	3.6	4.5	7.3	5.9
Undecided	8.3	38.5	0.0	0.0	16.2	16.7	9.0	14.6	17.1	13.4
Somewhat Likely	16.7	23.1	0.0	25.0	16.2	25.8	11.7	14.6	29.3	17.9
Very Likely	50.0	15.4	87.5	50.0	45.9	25.8	5.4	19.1	14.6	15.0

Respondents who said they were very unlikely to take a course were not asked to answer additional questions. Hence, the number of respondents declines to 201.

⁴ See attached Survey Preamble

Table 9 identifies the courses farmers are interested in and can be used for curriculum design and course planning.

Table 9: Specific Course Interest (%)

Courses	Region 1	Region 2	Region 3	region 4	All Regions
Organic Soil Management	50.0	20.2	30.9	33.3	31.7
Organic Methods – Tree Fruit	33.3	5.6	36.1	31.1	23.8
Ground Crop and Fruit Pest	46.2	6.5	26.8	20.0	23.0
Composting	30.8	12.1	21.6	22.2	20.3
Transition to Organic Methods	24.4	5.6	26.8	15.6	17.2
Organic Methods – Field Crop	30.8	8.9	12.4	20.0	16.3
Organic Methods – Greenhouse	29.5	4.0	8.2	13.3	12.2
Organic Methods – Livestock	16.7	7.3	3.1	8.9	8.4
Organic Methods – Poultry and Egg	17.9	2.4	4.1	2.2	6.4
Maintaining Organic Integrity	11.5	3.2	5.2	8.9	6.4
Other	6.4	2.4	5.2	2.2	4.1

Table 10 asks how important the practical training component is . . .

Table 10: Practical Component Importance

	Region 1	Region 2	Region 3	Region 4	Total No, of Responses
Not Important At All	11.3%	6.3%	0.0%	6.3%	12
Not That Important	29.0%	39.6%	20.4%	34.4%	59
Very Important	37.1%	41.7%	55.6%	46.9%	88
Essential	22.6%	12.5%	24.1%	12.5%	37
Total responses					196

Table 11 identifies if distance from the training facility is a barrier to enrolment.

If field training required you to spend 3-5 days in the South Okanagan or Similkameen valleys, would that prevent you from taking a course?

Not surprisingly, distance was more often viewed as an obstacle the further away from the Similkameen the respondent resided.

Table 11: Distance Barrier

	Vancouver Island	Fraser Valley	Okanagan - Similkameen	South Columbia	Total No, of Responses
Definitely	35.5%	20.8%	5.7%	12.9%	39
Probably	25.8%	33.3%	13.2%	35.5%	50
Probably Not	27.4%	27.1%	34.0%	48.4%	63
Not At All	11.3%	18.8%	47.2%	3.2%	42
Total responses					194

Table 12 responds to a question that asks if having billeting provided would increase the likelihood of enrolling.

Table 12: Billeting Needs

	Region 1	Region 2	Region 3	Region 4	Total No, of Responses
Yes	46.8%	51.1%	58.5%	48.3%	101
No	53.2%	48.9%	41.5%	51.7%	96
Total responses					197

Table 13 shows responses to a question that asked if farmers would be more likely to take the training if it were offered within a 50 km radius of their farm.

Table 13: Local Availability of Training

	Region 1	Region 2	Region 3	Region 4	Total No, of Responses
No	3.2%	4.2%	15.1%	12.9%	16
Perhaps	25.4%	50.0%	34.0%	45.2%	72
Yes	71.4%	45.8%	50.9%	41.9%	107
Total responses					195

Together, tables 11, 12 and 13 give indicators of the limitations of having a single training location and of the potential for increased enrolment if training was offered at locations across the province. It is likely that distance from the institute is only one factor in responses listed in Table 13. Receiving training in similar climate and soil regimes is probably another factor.

Table 14 shows responses to the following question.

We are designing courses that, on average, require students to put in 30 hours of self-paced, in-home study and 20 hours of practical, field training. Does that amount of study and training time seem:

The question reflects the course model outlined in the business plan. Over 77% of farmers indicate that the length of training is appropriate.

Table 14: Length of Course

	Total	%
Too Short	19	10.3%
About Right	143	77.3%
Too Long	23	12.4%

In the business plan, \$500 is the approximate fee for a course. Table 15 assesses market willingness to pay that amount. Just over 50% of farmers are willing to pay \$500. Thirty percent

indicate \$500 is slightly more than they are willing to pay. Responses are not based on product knowledge or reputation. Given that perceptions of value influence willingness to pay, the OFI may interpret the results as indicating that 80% of BC farmers will pay a \$500 course fee. Or, the OFI might respond to Table 15 data by pricing courses slightly below \$500.

Table 15: Willingness to Pay

	Total	%
Much more than you are willing to pay	35	18.1%
Slightly more than you are willing to pay	59	30.6%
What you are willing to pay	93	48.2%
Less than what you are willing to pay	6	3.1%

Table 16 shows the importance of receiving course credit from a recognized post-secondary institution.

Table 16: Course Credit

	Total	%
Not Important	90	45.7%
Somewhat Important	58	29.4%
Important	49	24.9%

Table 17 shows the importance of receiving a certificate of training from a recognized post-secondary institution.

Table 17: Recognized Certificate

	Total	%
Not Important	53	27.7%
Somewhat Important	78	40.8%
Important	60	31.4%

The results in Table 16 and Table 17 indicate that course credit and certification are important to 25% and 31% of farmers, respectively. Those ratios increase to 55% and 72%, respectively, when the "somewhat important" response share is added.

Using the Survey

The tables in this report show results for specific questions. The value of the survey data goes much deeper. Correlations between responses to questions are infinitely possible. There are many questions planners of the OFIBC will want to make of the survey data. Other organizations will also find various correlations of interest and there is potential to sale survey information.

The survey results will be folded into the 2005 business plan. They give reliable information on the size of the farmer market for OFIBC courses. They provide details on which types of production will yield farmers interested in courses and which types of courses are likely to be most subscribed. Survey results indicate that the 2005 course design and delivery model meet the needs of farmers.

However, not all farmers indicated satisfaction, and so some adjusting of design and delivery, or the creation of options, may be considered.

Many respondents made notes on the surveys. It would likely be of value for OFIBC management to read these comments.

Survey results will be used to revise student numbers and projected revenues. This will enable the OFIBC to have more confidence in these projections.

Finally, the high interest shown by BC's farmers in the OFIBC product and the increased reliability of financial projections will assist in fund raising. Once the business plan is revised, an aggressive campaign of fund raising can begin.