

Indiana State Department of Agriculture 2008 Stakeholder Survey

Executive Summary

04-29-08



Research Objectives

- Identify awareness level of stakeholders in ISDA's priorities, past performance and future activities.
- Measure stakeholders perceived value in ISDA and its strategic plan?
- Capture issues and opportunities most important to key stakeholders?
- Evaluate past focus areas with stakeholders - on right issues?
- Identify future issues and opportunities
- Measure expected performance
- Identify issues needing most attention focus; either address or capitalize opportunity
- Perform quantitative analysis among key Indiana agriculture stakeholders to assess their perceptions against aforementioned points



Research Design

- **Target Audiences**
 - Large, medium and small sized farms
 - Industry association leadership
 - Agribusiness executives
- **Timeframe** – May 1
- **Information Usage**
 - Revise ISDA's operating mission and communications strategies as needed to better communicate the department's roles and functions.
 - Update the ISDA Strategic Plan as needed, potentially changing the level of investment

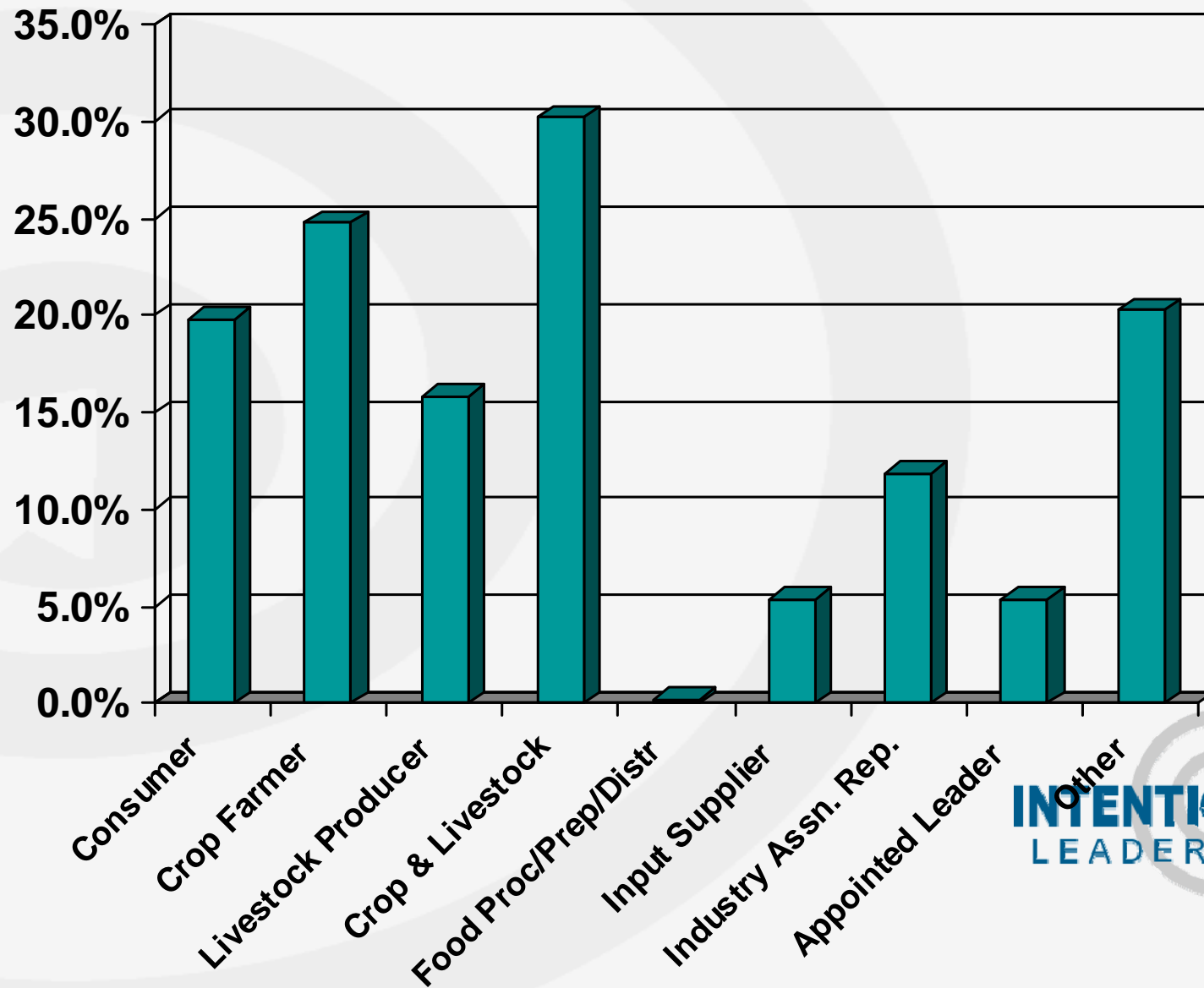


ISDA April 2008 Survey

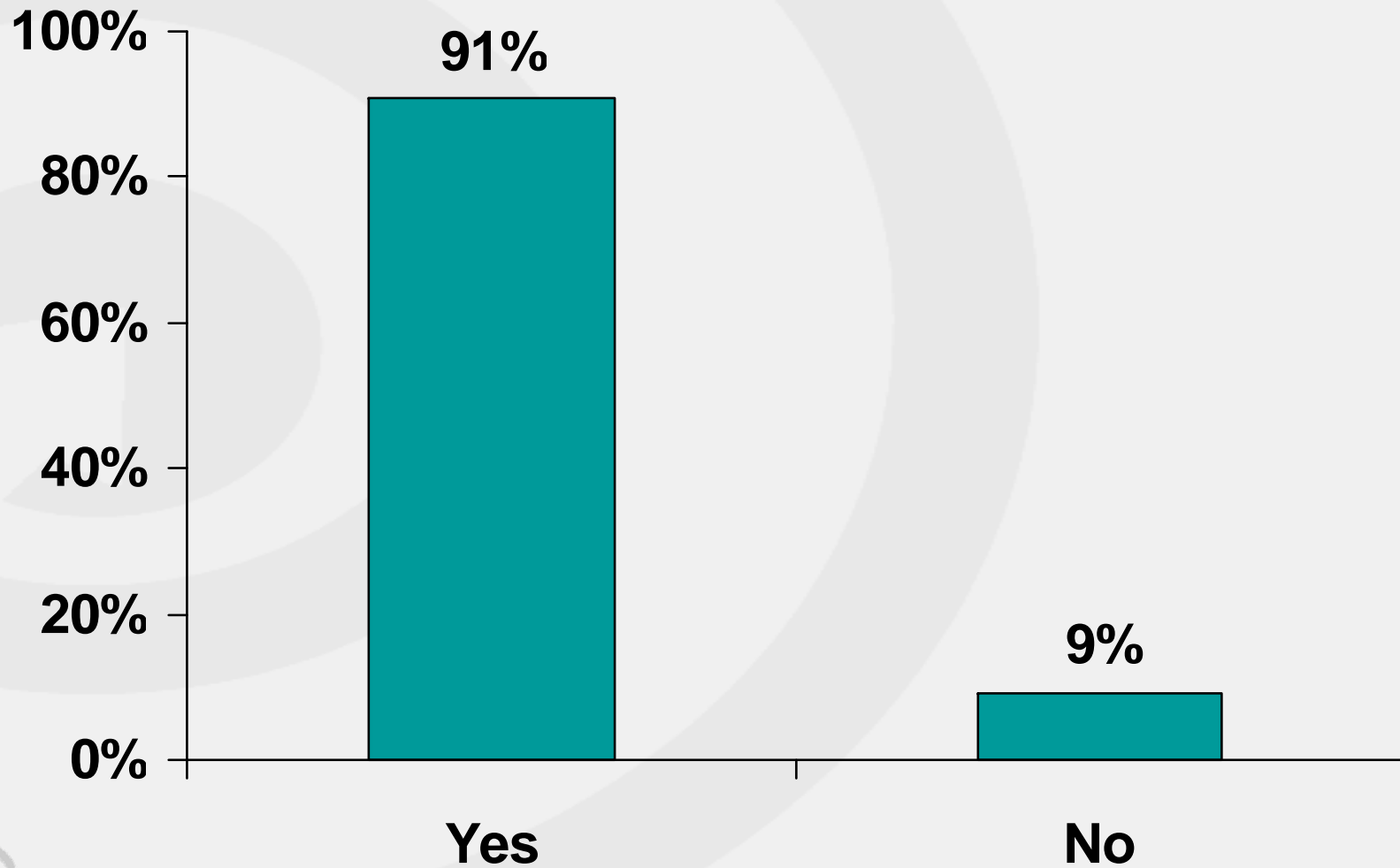
- Survey Facts
 - Conducted March-April 2008
 - 213 Responses
- Demographics (some multiple selections)
 - 30% Crop & Livestock (ave. 1,348 acres)
 - 24% Crop farmer (ave. 1,453 acres)
 - 20% Consumer
 - 16% Livestock
 - 12% Industry Association
 - 20% Other



1. I am

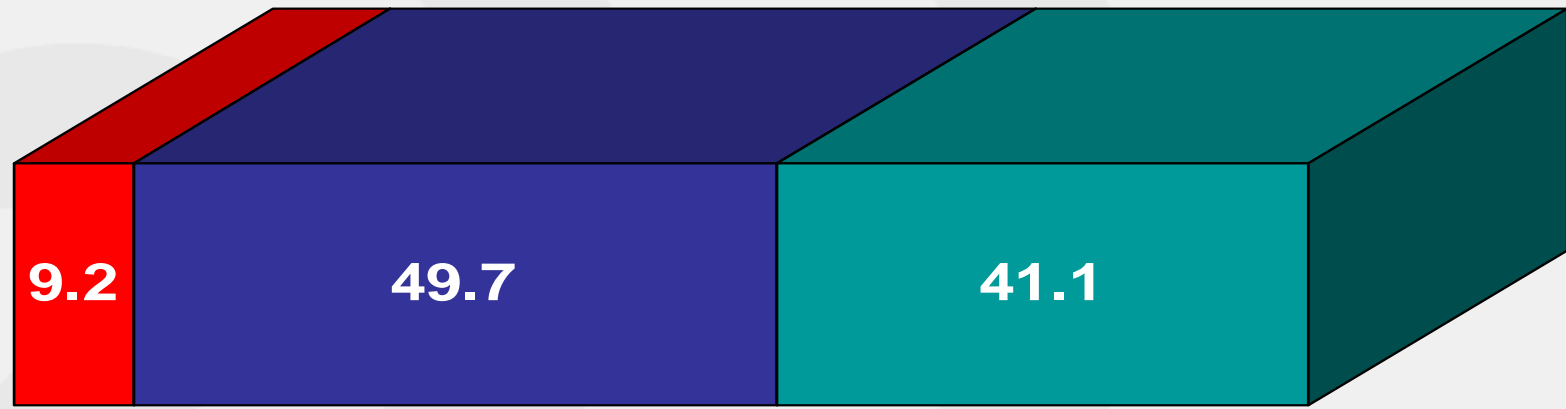


10. Are you aware that in 2005 Indiana state government created its first stand-alone department of agriculture?



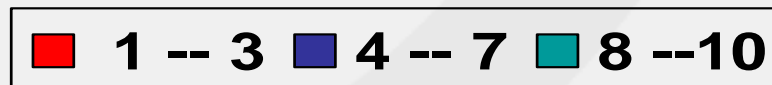
11-1. Please tell us how aware you are in the following aspects of the Indiana State Department of Agriculture.

The role of the ISDA



Unaware

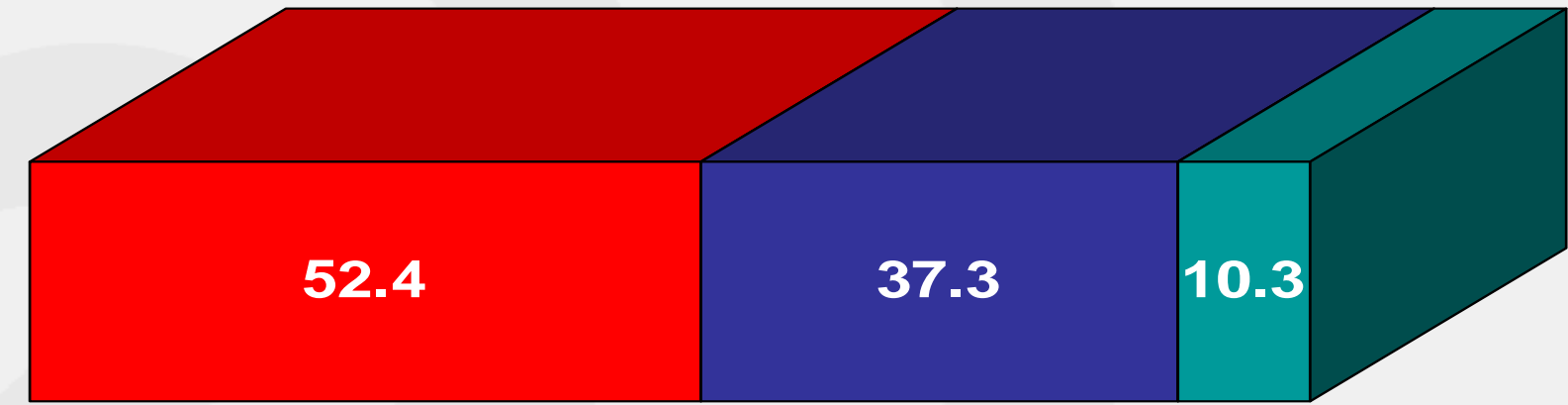
Aware



Average - 6.8

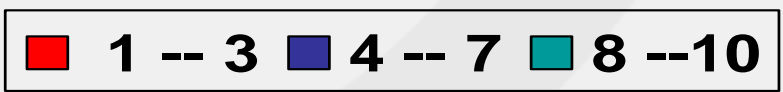
11-1. Please tell us how aware you are in the following aspects of the Indiana State Department of Agriculture.

The ISDA Budget



Unaware

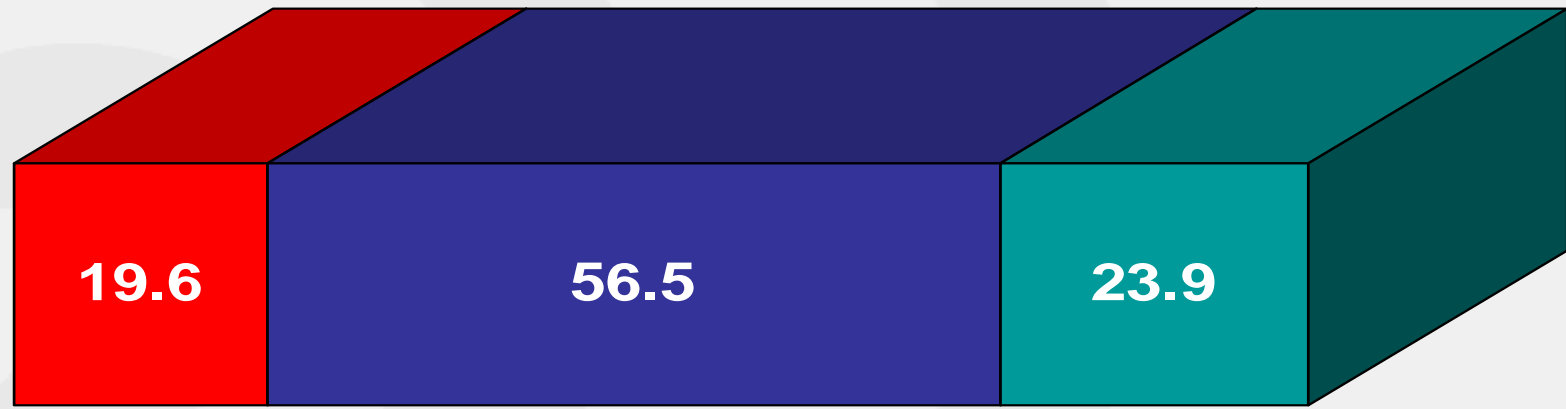
Aware



Average - 3.8

11-1. Please tell us how aware you are in the following aspects of the Indiana State Department of Agriculture.

The overall activities of the ISDA



Unaware

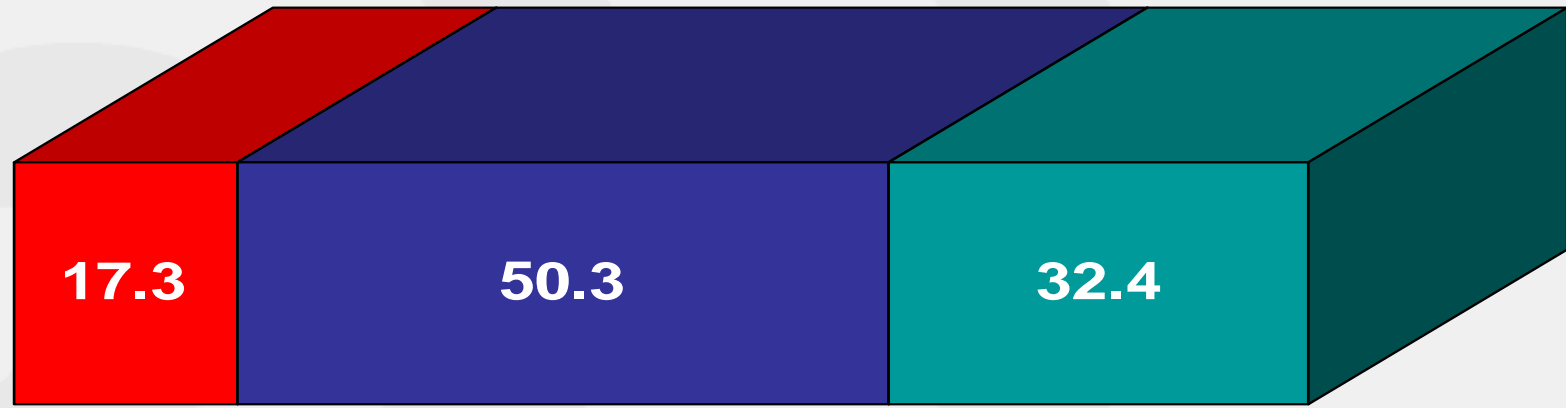
Aware



Average - 5.7

11-1. Please tell us how aware you are in the following aspects of the Indiana State Department of Agriculture.

ISDA's activities promoting economic development in Indiana agriculture



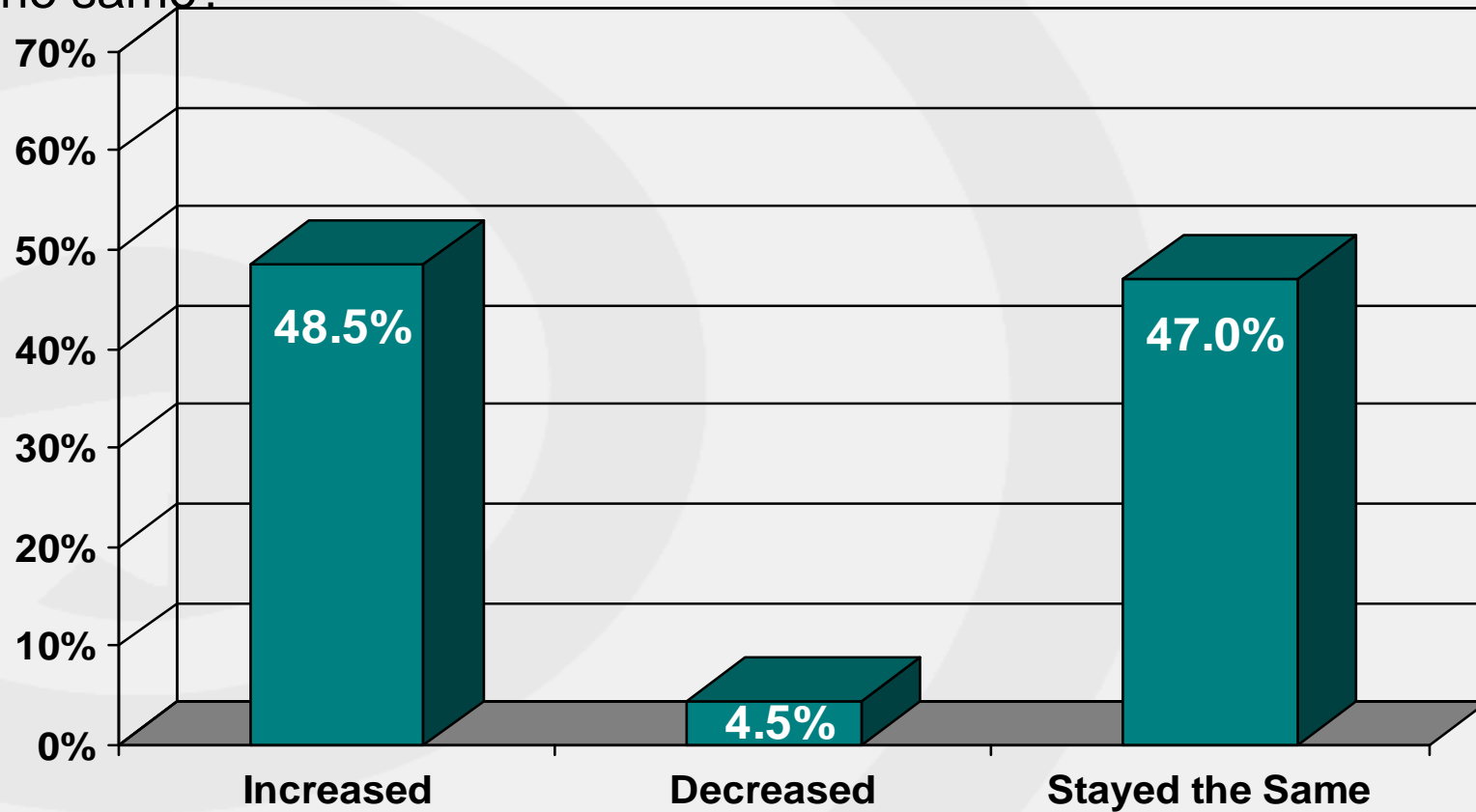
Unaware

Aware



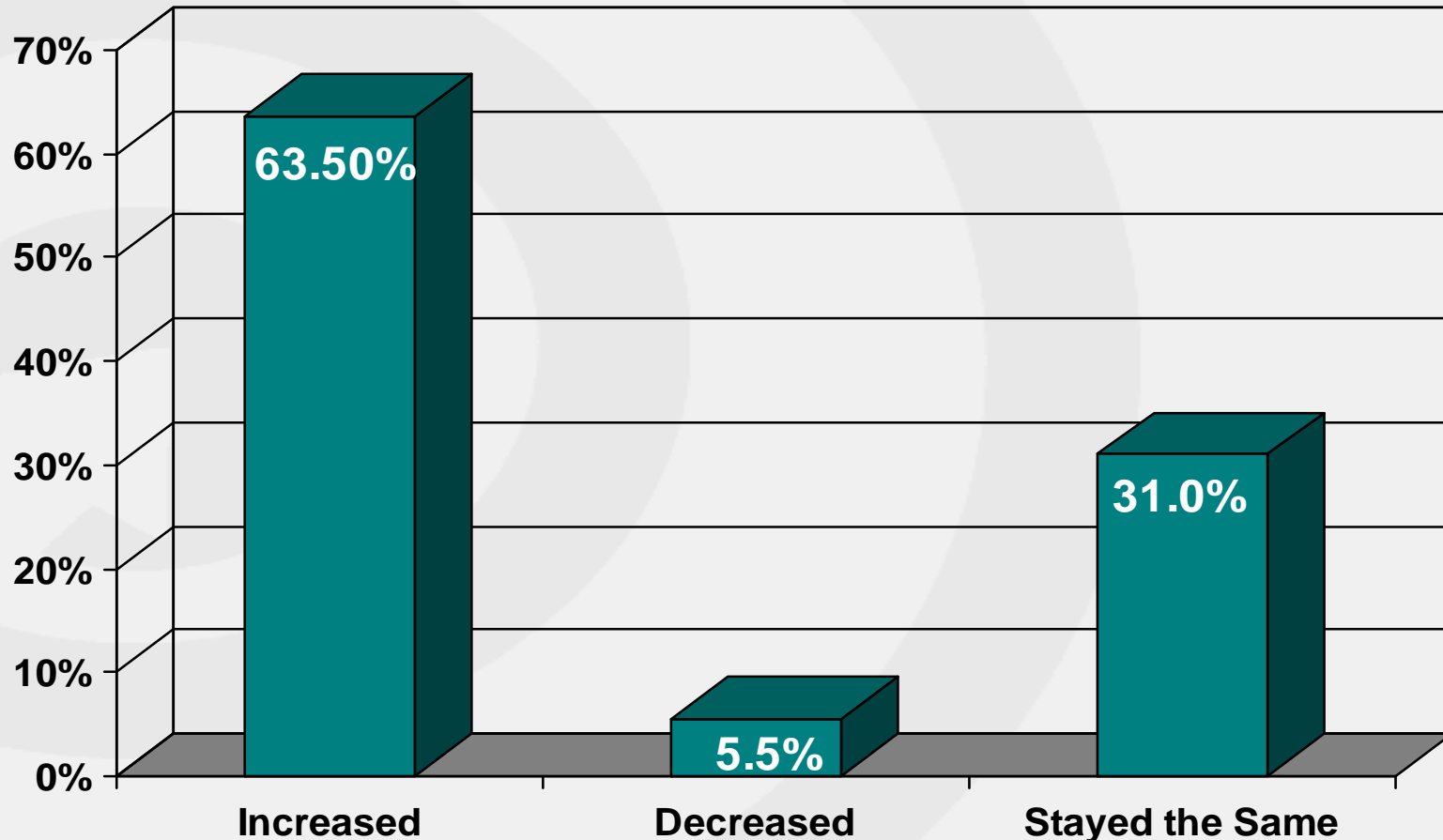
Average - 6.1

12-1. Please tell us your perception about the work of the Indiana State Department of Agriculture. Since its inception three (3) years ago, would you say the following increased, decreased or stayed the same?



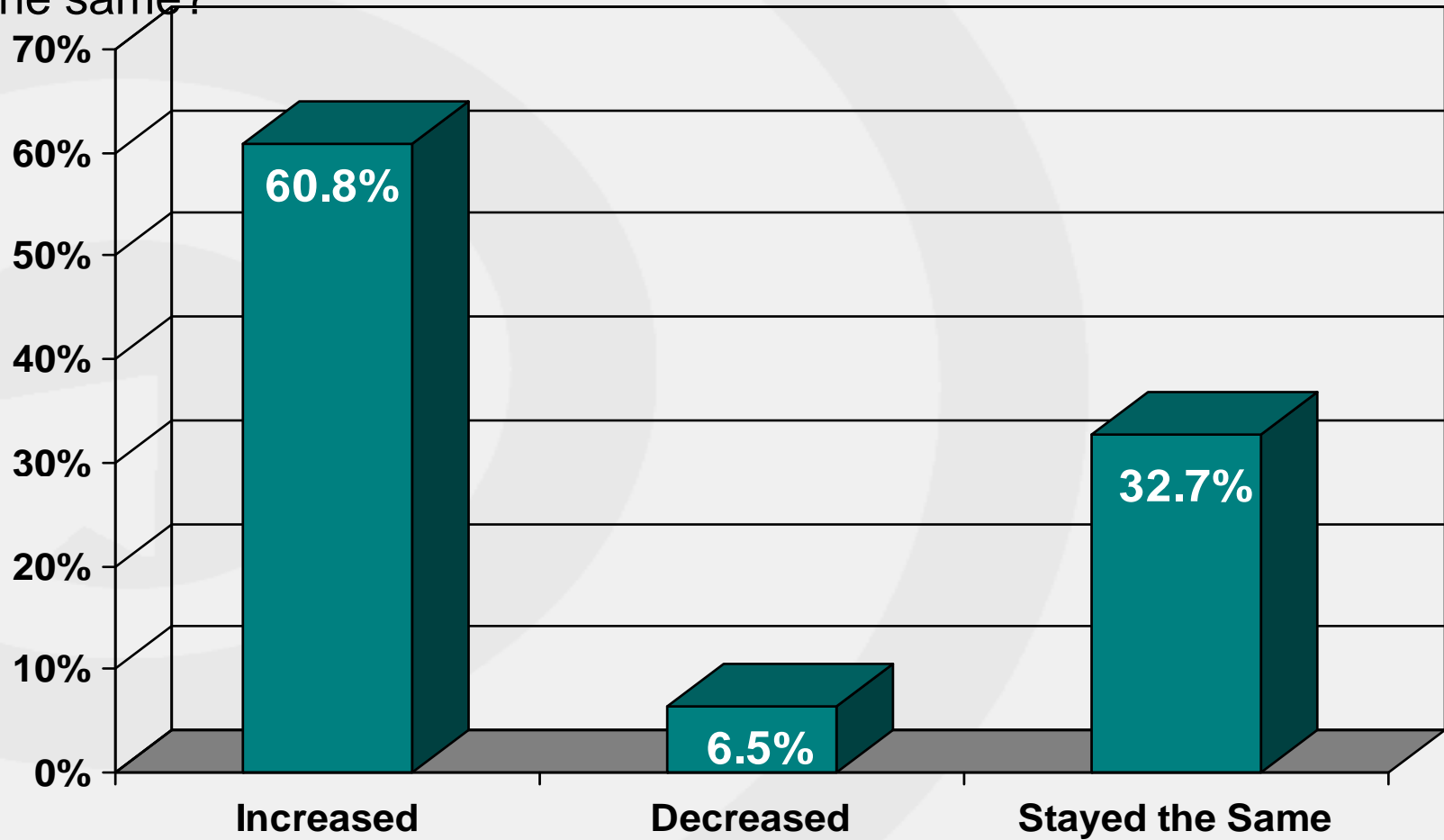
■ **1. Awareness and understanding of the Indiana general public on the importance of agriculture**

12-2. Please tell us your perception about the work of the Indiana State Department of Agriculture. Since its inception three (3) years ago, would you say the following increased, decreased or stayed the same?



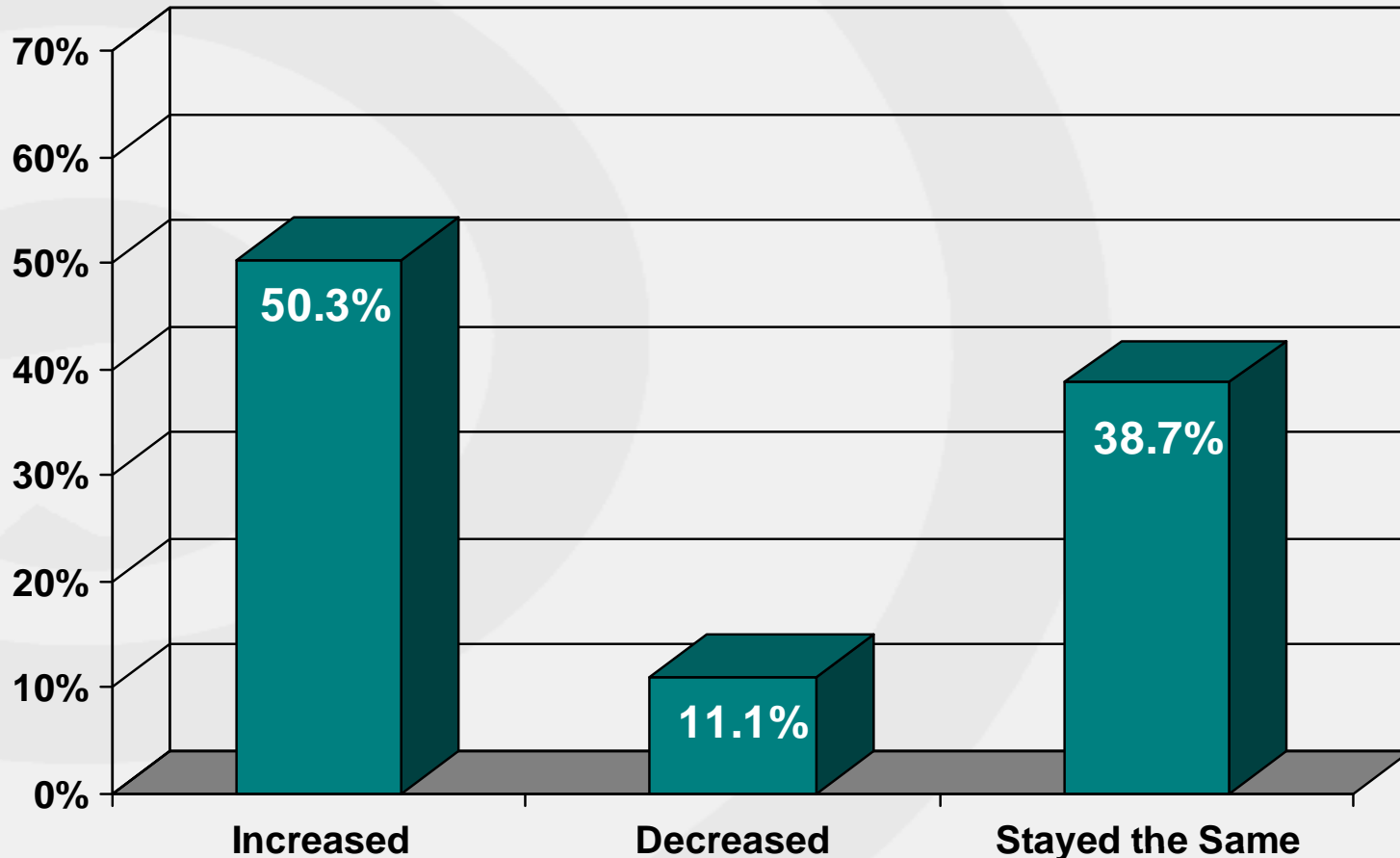
■ **2. Attention from state leaders to the agriculture sector**

12-3. Please tell us your perception about the work of the Indiana State Department of Agriculture. Since its inception three (3) years ago, would you say the following increased, decreased or stayed the same?



■ 3. Opportunities for growth in Indiana agriculture

12-4. Please tell us your perception about the work of the Indiana State Department of Agriculture. Since its inception three (3) years ago, would you say the following increased, decreased or stayed the same?



■ **4. Challenges or issues preventing growth of Indiana agriculture**

15. Of the issues and opportunities for growth listed above, what, in your opinion, are the three (3) most important?

| Issue | 1 | 2 | 3 | SUM |
|---|----|----|----|-----|
| Reform Property Tax Structure | 30 | 20 | 18 | 68 |
| Land use & zoning policies | 23 | 16 | 22 | 61 |
| Enhance soil & water conservation | 26 | 15 | 17 | 58 |
| Enhancing Public Understanding | 37 | 5 | 15 | 57 |
| Innovation & technology | 3 | 13 | 17 | 33 |
| Biofuel/energy Dev. | 11 | 11 | 3 | 25 |
| Transportation needs | 7 | 10 | 8 | 25 |
| Diversified Farming Ops. | 5 | 9 | 11 | 25 |
| Grow Food & livestock processing sector | 5 | 10 | 10 | 25 |
| State regulatory functions | 4 | 7 | 13 | 24 |
| Partipation in Fed. Soil Conservation Prog. | 3 | 14 | 6 | 23 |
| Improve regulatory sector | 6 | 13 | 3 | 22 |
| Int'l Ag Opportunities | 3 | 8 | 11 | 22 |
| Integrate Modern livestock farms | 2 | 6 | 9 | 17 |
| Grow Livestock Production | 8 | 4 | 4 | 16 |
| Hardwood Sector | 4 | 2 | 3 | 9 |

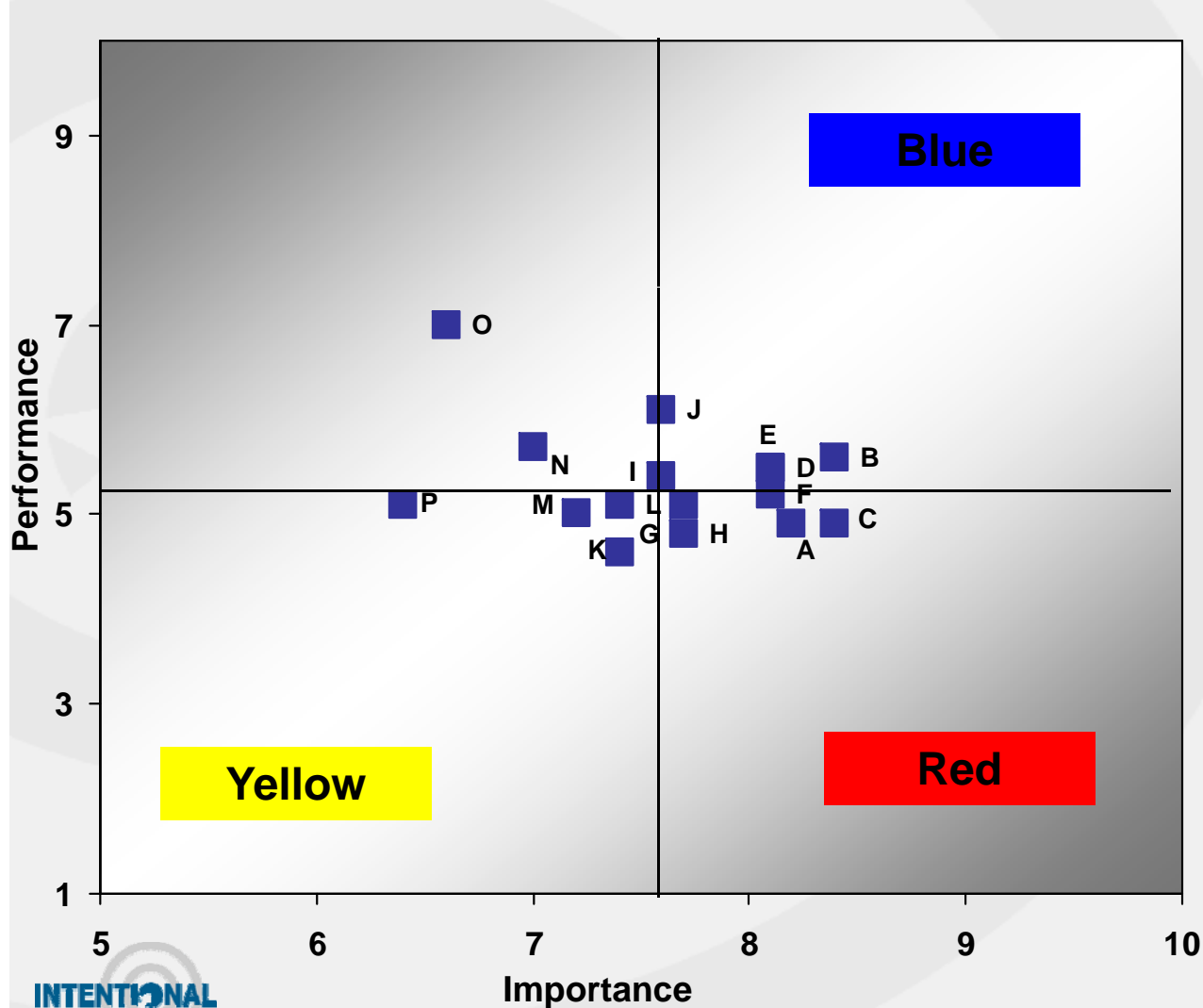
How Hoosiers See ISDA

| Issue | Awareness | Importance | Performance |
|---|-----------|------------|-------------|
| Reform Property Tax Structure | | 8.4 | 4.9 |
| Enhance public understanding of state ag | | 8.4 | 5.6 |
| Land use & zoning policies | | 8.2 | 4.9 |
| Enhance soil & water conservation | | 8.1 | 5.5 |
| Stimulate innovation & technology | | 8.1 | 5.5 |
| Help farmers work w/ state regulatory | 5.1 | 8.1 | 5.2 |
| Grow Food & livestock processing sector | 5.2 | 7.7 | 5.1 |
| Integrate modern livestock farms | 4.9 | 7.7 | 4.8 |
| Partipation in fed. soil conservation prog. | 4.9 | 7.6 | 5.4 |
| International trade opportunities | 5.4 | 7.6 | 6.1 |
| Address transportation needs | | 7.4 | 4.6 |
| Improve regulatory sector | | 7.4 | 5.1 |
| Increase diversified farming opportunities | 4.7 | 7.2 | 5.0 |
| Grow livestock production | 6.3 | 7.0 | 5.7 |
| Biofuel/energy development | 7.3 | 6.6 | 7.0 |
| Growing hardwood sector | 4.7 | 6.4 | 5.1 |
| Ave | 5.4 | 7.6 | 5.3 |

Importance : Performance

| | | |
|----|---|--|
| 10 | <p>Lower importance Higher performance Consider allocating resources to higher priority activities or increase awareness of it's importance</p> | <p>Higher importance Higher performance Good thing – keep doing what you are doing or do more of it</p> |
| 1 | <p>Lower importance Lower performance Keep on the path you are on</p> | <p>Higher importance Lower performance Opportunities – Start increasing performance and/or awareness</p> |

How Hoosiers See ISDA

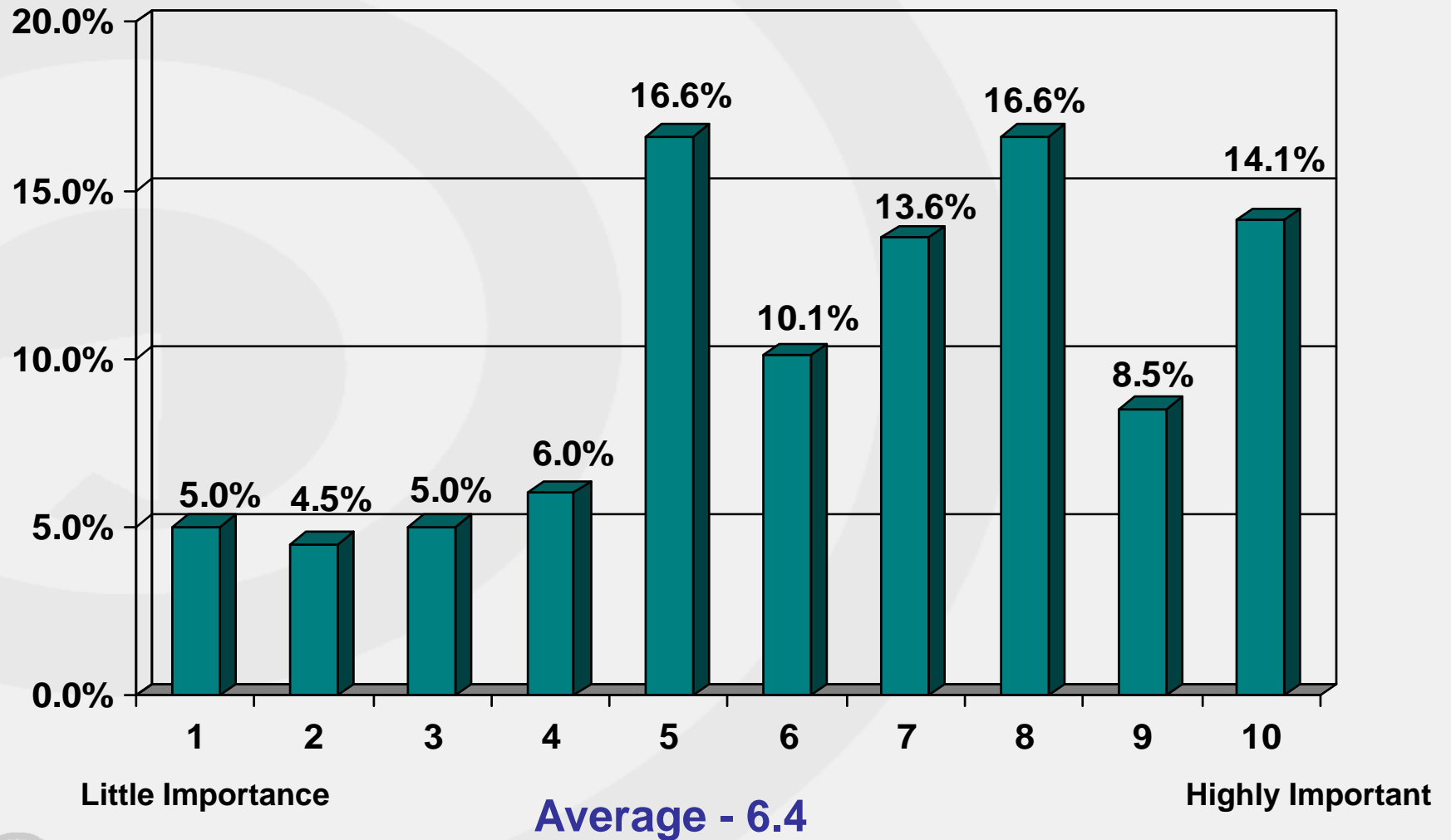


Ratings

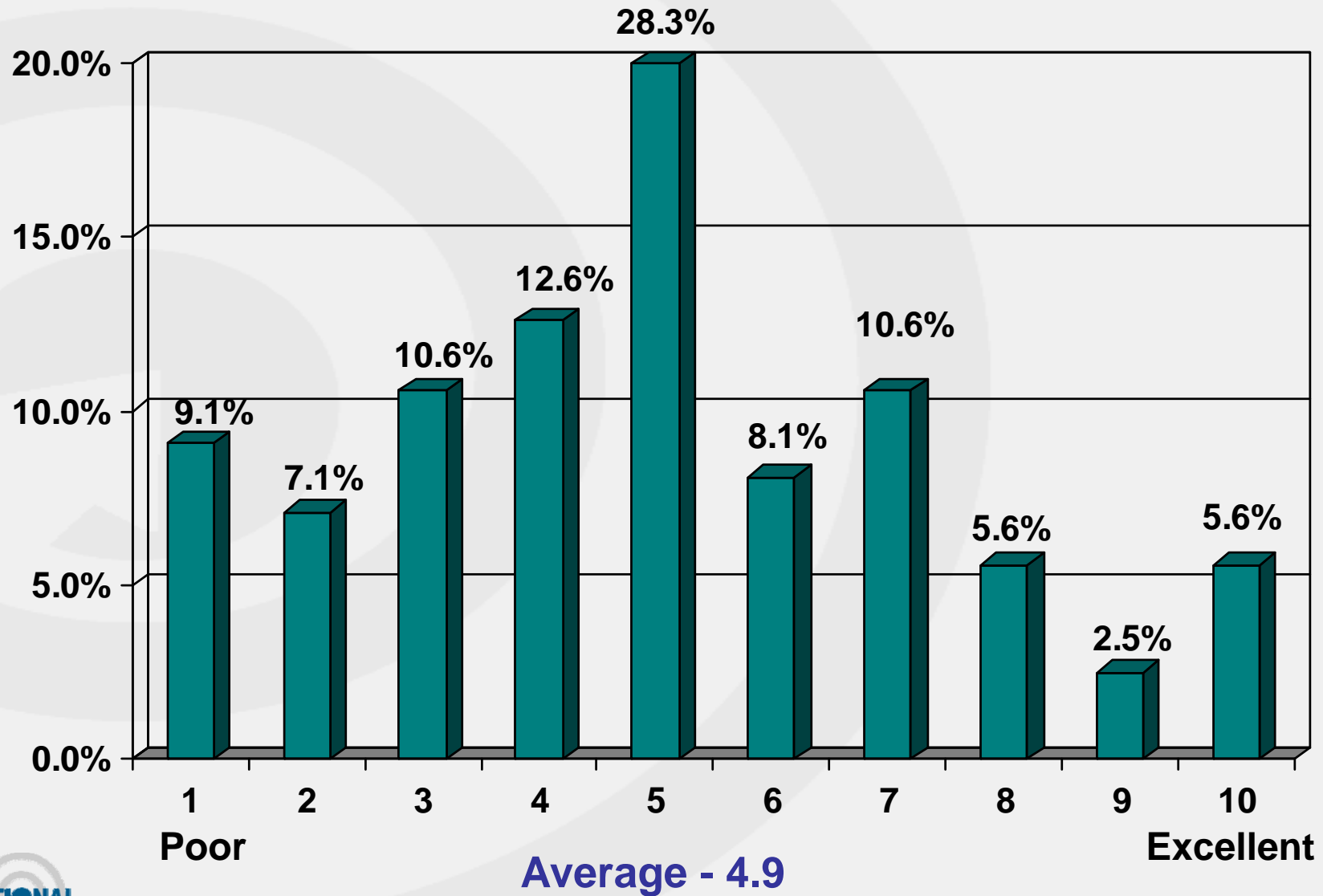
(Importance, Performance)

| | | |
|---|--------------------------|------------|
| A | Reform taxes | (8.4, 4.9) |
| B | Understanding of ag | (8.4, 5.6) |
| C | Zoning policies | (8.2, 4.9) |
| D | Conservation | (8.1, 5.5) |
| E | Innovation & technology | (8.1, 5.5) |
| F | Help Farmers w/ Reg | (8.1, 5.2) |
| G | Processing sector | (7.7, 5.1) |
| H | Integrate modern farms | (7.7, 4.8) |
| I | Fed. Conservation | (7.6, 5.4) |
| J | Int. trade | (7.6, 6.1) |
| K | Address transportation | (7.4, 4.6) |
| L | Improve State regulatory | (7.4, 5.1) |
| M | Diversified farming | (7.2, 5.0) |
| N | Livestock production | (7.0, 5.7) |
| O | Biofuel/energy dev. | (6.6, 7.0) |
| P | Hardwood sector | (6.4, 5.1) |
| | Average | (7.6, 5.3) |

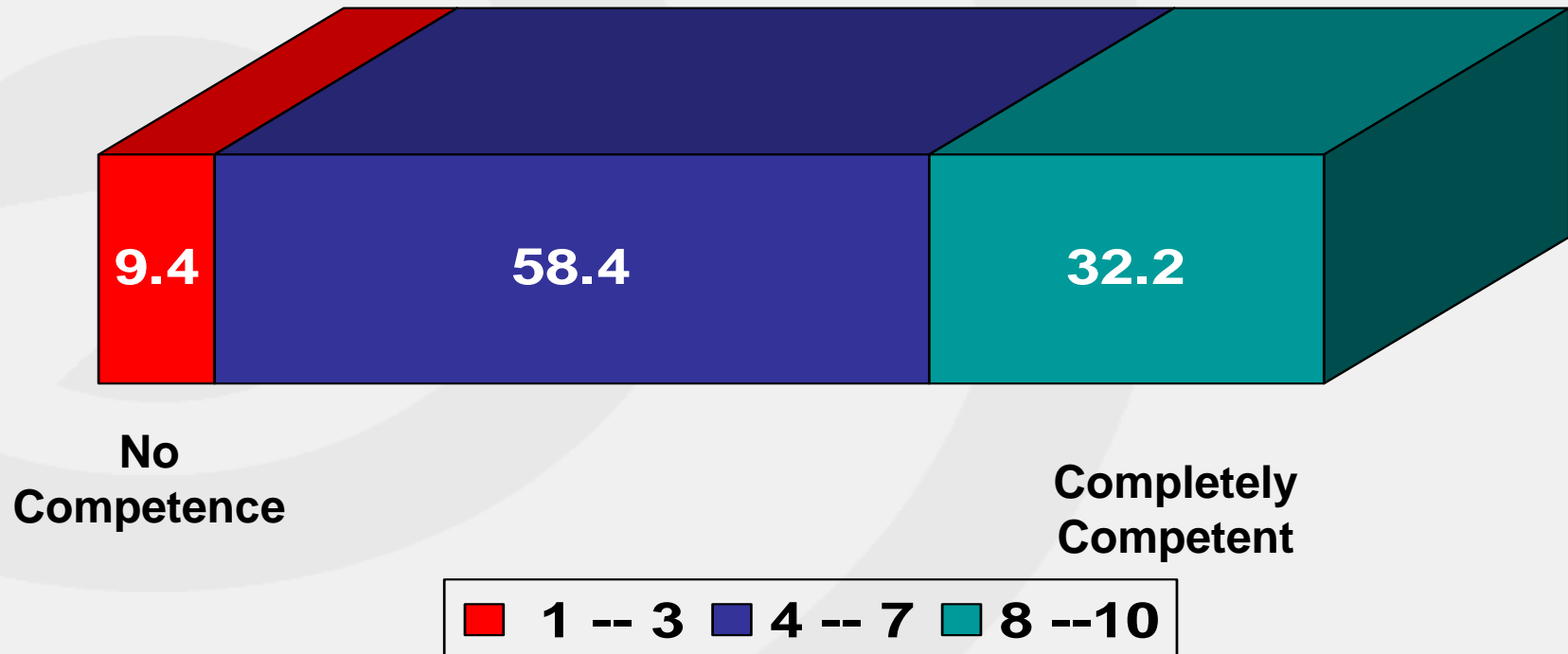
14-8. Growing Indiana's hardwood sector



16-4. Improving local land use and zoning policies

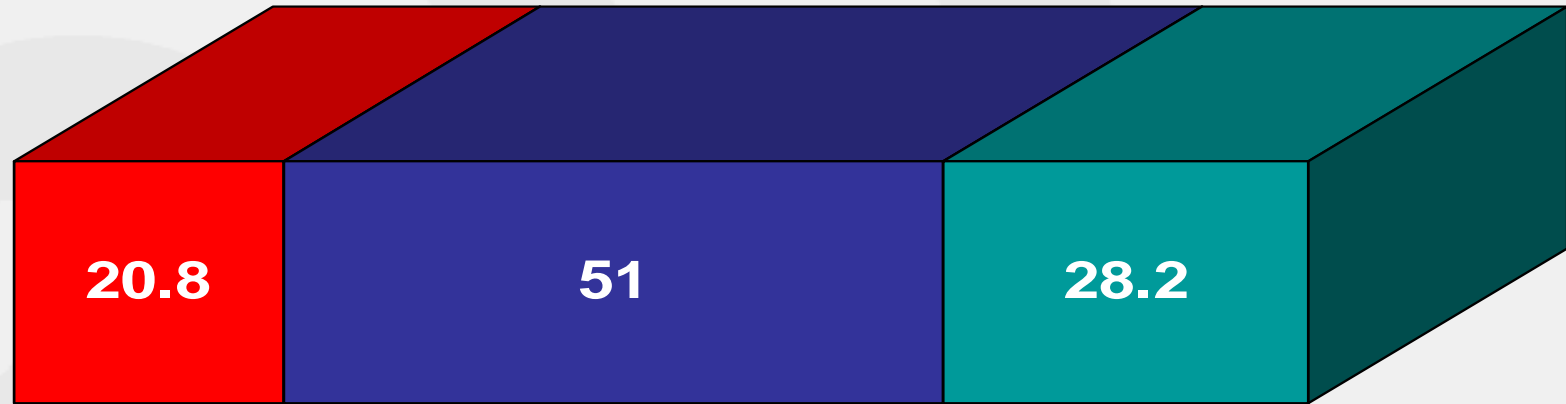


18. Please tell us how competent you believe the Indiana State Department of Agriculture staff is.



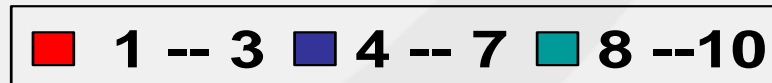
Average - 6.4

19. Please tell us how confident you are that the Indiana State Department of Agriculture staff shares your values and is willing to do what is right.



No
Confidence

Complete
Confidence



Average - 5.9

Opportunities

- Increase awareness of
 - Role ISDA plays and activities
 - Growing hardwoods sector
 - Diversified farming opportunity
 - Modern livestock farms
 - Federal soil conservation programs

Opportunities (continued)

- Hoosiers have a high desire for you to...
 - Reform property tax structure
 - Reform land use & zoning policies
 - Enhance public understanding of IN Ag
 - Enhance soil and water conservation
 - Address transportation needs
 - Integrate modern livestock farms

Threats

- Expectations of the stakeholders may be disproportionate to current ISDA budget and sphere of influence
- A lack of understanding of the importance that biofuels/energy and livestock play in the state

Strengths

- Increasing awareness of importance of agriculture
- Increased attention paid by state leadership

Keep Doing

- Making people aware of the work you do regarding international trade
- Growing awareness of the importance of biofuel/energy and livestock production
- Developing Indiana ag opportunities
- Promoting soil conservation practices

Start or Increase

- Communicate your position regarding
 - Reform property tax structure and land use & zoning policies
- Enhancing public understanding of IN Ag
- The role you play in...
 - Addressing transportation needs
 - Enhancing soil and water conservation
 - Integrate modern livestock farms
 - Increasing innovation and technology
 - Increasing food and livestock processing in state
- Consider evaluation of your messaging on biofuels/energy and livestock as they have a relatively high awareness but relatively low importance

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