



A healthy and prosperous economy depends on sustainable, profitable agriculture. It is Maryland's largest commercial industry, supporting 84,000 jobs and generating \$19.4 billion annually.

In 2018, the Hughes Center conducted research to measure consumer behavior and attitudes towards agriculture. The research found the public has many connections to farming and favorable views of farmers, but little understanding of forestry and how wood is grown and managed.

By raising agricultural literacy levels, we can strengthen and sustain vibrant farms and forests.

Many Marylanders Feel Connected to Agriculture

Whether living in metropolitan areas, growing exurbs, or the rural reaches of the state, Marylanders value farming and fresh food. Farm stands, pick-your-own fields, vineyards and farmers markets create consumer experiences positively associated with good, fresh food.

IN THE PAST YEAR



45% OF CITIZENS VISITED A FOOD PROCESSING FARM IN MARYLAND



Above average income consumers are **more likely** to have recently visited a farm



Residents of the state's rural areas are **no more likely** to have visited a farm

Marylanders Value Farmers & Farming

Maryland consumers have favorable impressions of agriculture and its producers. They understand farming is a business requiring savvy and innovation. They believe farmers are "hard-working" and "dedicated." Yet, they are concerned forces outside of farmers' control could drive them out of business.



78% AGREE, "AGRICULTURE IS VITAL TO MARYLAND'S ECONOMY," WITH A 51% MAJORITY AGREEING STRONGLY.

TWO-THIRDS (66%) OF MARYLANDERS FEEL FARMERS ARE GOOD LAND STEWARDS



66% BELIEVE WHEN FARMERS ARE ECONOMICALLY SUCCESSFUL, THE ENVIRONMENT BENEFITS.

MORE THAN HALF OF CONSUMERS



SHOP AT A FARMERS' MARKET / FARM STAND



22% OF CITIZENS HAVE RECENTLY SPOKEN WITH A



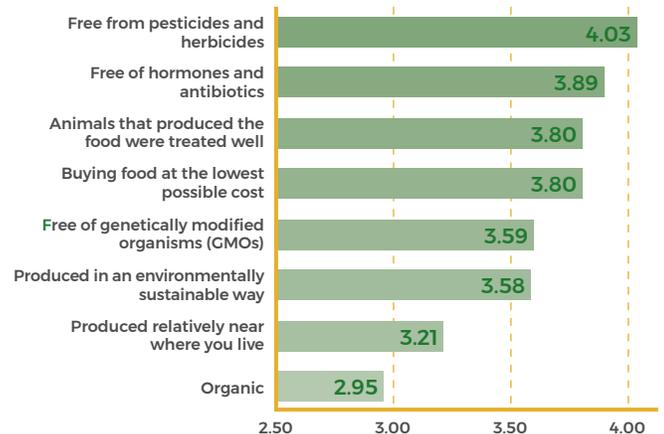
MARYLAND FARMER

27%

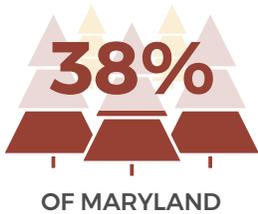
Know a farmer personally

Marylanders Value Fresh, Local Food

Marylanders put thought into the foods they select and the source of their food. They select food based on priorities related to health such as knowing food is free of pesticides, herbicides, hormones and antibiotics.



FORESTS COVER



FORESTRY IN MARYLAND PRODUCES WOOD FOR



PAPER, FURNITURE, BIOFUELS
AND HOME BUILDING

Forestry is Undefined & Unknown

Forestry is much less defined in people's minds than farming. The public has a difficult time picturing forestry professionals. They also don't understand that wood products are grown in Maryland.

- 1 Marylanders are typically at a loss to describe or picture the forest industry or imagine the type of people who work in it.
- 2 If they have a picture, they described park rangers, rather than commercial or state foresters.
- 3 Favorability ratings for Maryland's forestry - which includes growers, loggers, and mills - was lower than farming.
- 4 The difference was not due to negativity, instead, people were "neutral" or not sure about what defines the industry.
- 5 The lack of definition and awareness around forestry was also evident in the analysis of consumer decision-making.

HARVESTING

66% AGREE "RESPONSIBLE
HARVESTING OF
FORESTS IS VITAL TO
THE ECONOMY."

45% AGREE "FORESTS
WOULD BE HEALTHIER
IF ACTIVELY THINNED
AND MANAGED."

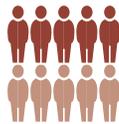
In Maryland Forestry is Associated with Development

For consumers in the populous Central Maryland region, harvesting trees creates the specter that animals and birds are losing habitat or that woodlands are being replaced for development. When asked, most are not aware trees are a renewable resource, requiring management for pests and invasive species, and growing wood for consumer products.

LOGGING



4 IN 10 MARYLANDERS
WOULD PREFER
THERE BE NO
LOGGING IN FORESTS.



HALF ARE NEUTRAL
OR NOT SURE.

Marylanders are Surprised by Agriculture's Size and Scope

Most people are unaware of agriculture's economic and employment impact of the state's agriculture and forestry industries. Knowing this positively influences their opinion of farming and forestry.

86% ARE SURPRISED:



**74% ARE SURPRISED
FORESTRY CONTRIBUTES:**

**\$4 BILLION
TO STATE'S
ECONOMY**

**EMPLOYS
10,000
PEOPLE**

**GENERATES
\$26M
IN TAXES
PER YEAR**

A Snapshot of Maryland's Farm & Forest Stewards

MARYLAND FARMERS:

Planted
500,000+ acres of
cover crops in 2017



for nutrient
management*

Implement plans*
to fertilize crops and
manage animal waste



to keep excess
nutrients out of
waterways

Plant forest and
grass buffers along
streams



to prevent erosion
and protect the
Chesapeake Bay

Lead the nation
in practicing
conservation farming



highest portion of
non-till fields and
cover crops

MARYLAND FORESTERS MANAGE WOODLANDS FOR:



CLEAN AIR



CLEAN WATER



HEALTHY WILDLIFE
HABITAT

SURVEY METHOD

This research was coordinated by OpinionWorks. A statewide survey of 813 adults was conducted online and four focus groups held in Central Maryland in summer, 2018. Survey participants were drawn randomly from two online consumer panels and a cross-section of household decision-makers invited to participate, which caused the sample to skew somewhat more female than the general population. In most other demographic and socio-economic respects, the sample was reflective of Maryland's population.

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