FOODROUTES NETWORK

Report

Building Support for Buying Local

**FoodRoutes Network**

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## Introduction

As FoodRoutes Network moves towards creating a national framework for buy local campaigns, there clearly is great potential to increase the number of consumers buying locally produced and grown food. Across a diverse range of regions in the country, a majority of shoppers say they purchase locally produced and grown food, and most of them think it is important to do so. Consumers believe that locally produced and grown food is fresher and of better quality, but also that it is an important part of supporting and sustaining their communities and local economies.

As consumers learn about the various reasons to buy local, they become even more supportive of the idea. People, especially the primary shoppers in the household, are willing to be more thoughtful and intentional about their food purchasing decisions when they hear about the benefits to the local economy and local farmers and about the freshness and superior quality of locally grown food.

Changing purchasing behavior, however, is more difficult than changing attitudes. While people say that they buy locally produced and grown food in high numbers, they are not especially intentional about buying local. Consumers tend to shop in big grocery stores where they are looking for quality and price, rather than the label that indicates the food is produced or grown locally. Moreover, people's interest in locally produced and grown food is largely limited to fruits and vegetables, mainly because they are looking for food that is fresh, and therefore, of better quality.

Inconvenience and ignorance are the biggest barriers to building support for locally produced and grown food. A minority of consumers frequently looks at labels to see where food is grown, and few people shop in the kinds of locations that sell predominately locally grown food (e.g., farmers' markets or community supported agricultural farms). Even though people are sensitive to price, they do not cite cost as a primary obstacle to buying local.

Increasing consumption of locally grown food is predicated on a three-step process: raising awareness about where to find and how to identify locally grown food, communicating a message about why it is important to buy local, and removing the obstacles to buying local. In order to build support for buy local efforts, we make the following recommendations:

- **Tap into existing values.** People buy local because they want fresh food and want to support their communities. The most persuasive buy local arguments in the surveys, unsurprisingly, invoke freshness and the need to support the local economy and endangered family farms. The family farm can take on a couple of different dimensions. First, the family farm contributes to the local economy and represents an important American institution that must be preserved. Second, the family farm contributes to the local economy, in contrast to corporate farms. The latter formulation is slightly less compelling, but generates support, nevertheless.

- **Make the link to food safety.** People express great concern about food safety, particularly the presence of chemicals, pesticides and hormones in their food. Food safety concern is a strong predictor of support for buying locally produced and grown food. The challenge for buy local campaigns is that local, family farms often use the very chemicals and pesticides that worry people.

- **Go where you find the consumers.** People shop most frequently in large grocery stores and rarely in places where locally produced and grown food predominate. Moreover, few people frequently look at labels to see where food is grown, which makes identifying local food even more challenging, given the wide array of choices in supermarkets. Any educational campaign will need to go where the consumers are, even if ultimately the goal is to persuade other institutions to buy local or to encourage people to shop in farmers' markets and community supported farms.

- **Target groups.** While the campaign should be broad in its focus, there are "target" shoppers who are more likely to support buy local food and are open to buy local messages. Women who tend to be the primary shoppers in the household, particularly older women (defined as women 50+), are likely to be more thoughtful shoppers and more open to the importance of buying local. In some areas, married women with children and senior citizens are also key targets for similar reasons.

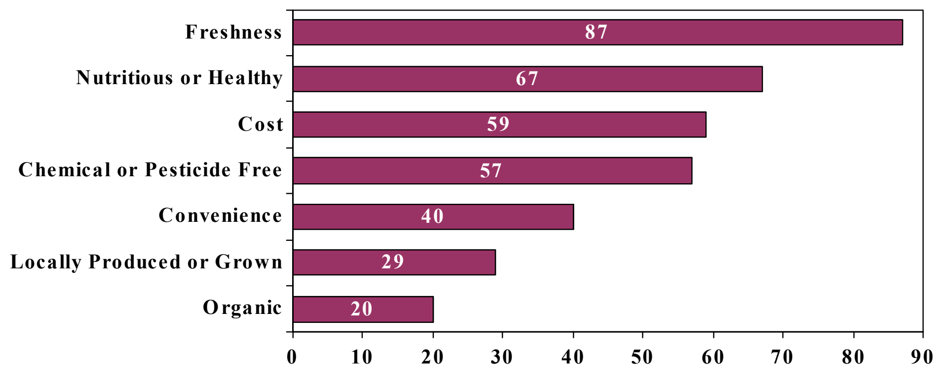
It should be noted at the outset that there is remarkable regional continuity on the question of buying local. We conducted surveys in four areas with buy local campaigns – Santa Cruz County, California; Blackhawk County, Iowa; the Greater Philadelphia Metro region; and Baton Rouge, Louisiana. Across these four diverse regions -- that vary greatly in levels of urbanity, class and racial composition -- consumers are remarkably consistent in their attitudes about buying local, their concerns about food safety and the appeal of messages on buying locally. Moreover, the kinds of people who are amenable to buying local remain rather consistent across regions. This report, therefore, is based primarily on the combined results of the surveys. The high degree of commonality in the results allows us to combine the data in most questions; however, these numbers are not representative of the national population. Where relevant, we talk about notable differences among the regions as well.

*Methodology.* The report is based on surveys among 400 residents in each area, conducted between March 12 and March 21, 2002. The surveys were conducted using random digit dial methodology and the margin of error for each survey is +/-4.9. The combined results give equal weight to each of the four regions, though the populations of these regions vary.

## Buying Food: The Priority of Buying Local

Consumers have a distinct set of preferences when they purchase food, primarily considering freshness (87 percent very important), nutritional value (67 percent very important), cost (59 percent very important), and the absence of chemicals and pesticides (57 percent very important). Whether or not food is locally produced or grown is a much lower priority for shoppers (29 percent very important). When asked more generally about the importance of buying locally produced and grown food, only 23 percent think it is very important that the food they eat comes from farms or ranches in their area.

**Factors Used When Purchasing Food**
**(Percent Responding Very Important)**




Despite the relatively low priority of buying local, the vast majority of people say they do buy locally produced and grown food (83 percent). Given that products such as milk are frequently produced in local dairies, this result should not be surprising. On the other hand, buying locally is not particularly intentional. There is significant regional variation in the frequency of purchasing locally produced and grown food – 45 percent of residents of Santa Cruz County, 28 percent of residents of the Baton Rouge region, 22 percent of residents metro Philadelphia and 18 percent of residents of Blackhawk County say they buy local every week.

When asked in an open-ended context, people who buy locally produced and grown food report that they do so because they think it is fresher (44 percent) and because they want to support their community, and local farmers (40 percent). An additional 12 percent buy locally because the food tastes better. The importance of freshness in buying local seems to fit with a strong preference for buying locally grown vegetables and fruit, rather than dairy, meat, or poultry.

| Type of Locally Produced Food Preferred (Percent Responding) | |
|---|---|
| Vegetables | 70 |
| Fruit | 59 |
| Meat | 18 |
| Dairy | 13 |
| Poultry | 10 |
| Not important to buy local | 13 |

Only 13 percent of consumers say they do not purchase locally produced and grown food. Their primary reasons are lack of information about where to buy locally grown food (27 percent) and inconvenient locations (30 percent). Some of the people who do not buy local feel it is simply not important (24 percent). Only 11 percent cite price as a reason for not buying local, despite the fact that 46 percent of people say it is very important to find the lowest possible price when purchasing food.

The biggest barriers to buying local are inconvenience and lack of information. The fact that the vast majority of people do their shopping in big grocery stores, with a significant number in convenience stores and smaller independent stores, represents a challenge in this regard. People simply do not shop frequently in places where locally grown and produced food predominate, such as community supported agricultural farms or at farmers' markets.

| Shopping Location - Weekly (Percent Responding) | |
|---|---|
| Large grocery stores | 73 |
| Small independent stores | 37 |
| Convenience stores | 36 |
| Farmers' markets | 11 |
| Warehouse stores | 9 |
| Roadside stands | 5 |
| Community supported farms | 4 |

Who Buys Local?

While nearly everyone says they buy locally produced and grown food, the people who think it is important to buy local are distinct – in general, they are more thoughtful about their food purchasing. Overall, 58 percent of consumers say it is very or somewhat important to them that food comes from farms and ranches in their area. These consumers make deliberate choices about food when they shop, considering health and safety, as well as cost and quality. They are also demographically distinct – they are more likely to be the women who are responsible for purchasing food in their households.

People who think buying local is important are more likely to think it is important to consider the presence of chemicals and pesticides and the nutritional value and healthiness of food they purchase. For instance, 64 percent of people who think it is important to buy local consider the presence of chemicals and pesticides a very important factor when they purchase food, compared to 46 percent among people who do not think it is important to buy local.

**Reasons to Buy Locally Produced Food**
(Percent Responding Very Important for Each Decision Factor)

| | **People Who Consider Buying Local Important** | **People Who Do Not Consider Buying Local Important** |
|---|---|---|
| **Freshness** | 89 | 84 |
| **Nutritious or healthy** | **73** | **58** |
| **Cost** | 62 | 55 |
| **Chemicals/pesticides** | **64** | **46** |
| **Convenience** | 40 | 40 |
| **Organic** | 27 | 11 |

People who value buying local also have a different orientation towards their community and the environment. They are more likely to pay attention to environmental issues in their community and express greater alarm about food safety.

**Attention to Environment and Food Safety**
(Percent Responding)

| | **People Who Consider Buying Local Important** | **People Who Do Not Consider Buying Local Important** |
|---|---|---|
| **Local Environment** | | |
| Closely | 76 | 54 |
| Not closely | 24 | 45 |
| **Food Safety** | | |
| Very concerned | 66 | 45 |
| Somewhat concerned | 24 | 34 |
| Little/not concerned | 11 | 21 |

The women who tend to be the primary shoppers in their households are more particular about their food purchasing than other consumers. Older women are more likely than other groups to say it is important to buy locally produced and grown food. Older women buy local more frequently and are more likely to look at the labels to see where food is grown or produced. Since they are more likely to be the primary shoppers in the household and probably responsible for the cooking, they are less likely to buy pre-prepared food.

Persuading People to Buy Local

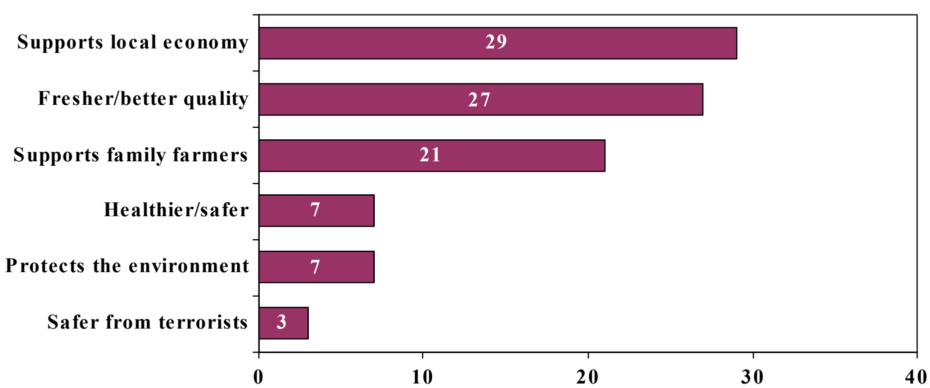
A large segment of consumers is impressionable and open to the notion that buying local is important. After hearing a series of messages about buying locally produced and grown food, 44 percent of people in the surveys shift toward thinking that buying local is more important than they thought at the outset of the survey, while 10 percent shift to the opposite position. The messages persuade a broad swath of consumers, though we continue to see higher support among women than men.

We tested a series of messages designed to encourage people to buy local that tapped into justifications, ranging from protecting the environment to supporting the economy, to protecting the food supply from terrorist attacks (see Appendix A for messages). The most persuasive reasons to buy local are the same reasons people stated as their primary reasons for buying local in the first place – that locally produced and grown food is fresher and that it supports the local economy. Regression analysis confirms the importance of these two messages in moving consumers to support buying local.

Messages that make assertions outside the realm of people's experience with food (e.g., concerns about terrorism) or are not linked to the considerations they think are unimportant (e.g., protecting the environment) are less persuasive.

## Most Convincing Reason to Buy Local

**(Percent Responding)**



*Freshness.* When people think about locally produced food – especially fruit and vegetables – they want a product that is fresh and of good quality. As we noted earlier, this is the top consideration when people shop generally and when they buy locally produced and grown food.

*The Local Economy.* The notion that buying local supports the local economy and family farmers resonates strongly with consumers. This desire to help the local community and economy emerges strongly at the start of the survey and remains one of the strongest messages at the close of the survey. Combined, supporting the local economy and farmers are named by 50 percent of consumers as the best reason for buying locally produced and grown food.

This concern about the local economy is bolstered by two beliefs. First, there is overwhelming support for buying domestically produced food. Fully, 84 percent of respondents say it is very or somewhat important that food come from farms and ranches in the United States rather than foreign countries. Second, there is enduring attachment to the institution of the family farm. The powerful message about supporting the local economy also invokes the family farm. The strongest message focused specifically on the family farm concentrates on it as "part of the American tradition of self-sufficiency and the foundation of local communities." An anti-corporate farm message is compelling, but less so than the message about the family farm's centrality to American tradition and community.

*Food Safety.* While these results suggest that the strongest message for FoodRoutes Network is narrowly focused on freshness and supporting the local economy, concerns about food safety are also strong and, if possible, should be included in the campaign communications.

The major food safety concern people hold is the presence of chemicals and pesticides in their food (47 percent), not the other kinds of contamination that occur with food processed in centralized facilities. It is important to find ways to make the connection between local production and food safety, though the challenge is that local farmers often employ the very chemicals and pesticides that worry consumers.

| **Top Food Safety Concerns** (Percent Responding) | |
|---|---|
| **Chemicals/Pesticides/Hormones** | 47 |
| **Freshness/Spoiled** | 19 |
| **Worries about health** | 8 |
| **Genetically Modified** | 8 |
| **Salmonella/bacteria/e coli** | 6 |
| **People tampering/contamination** | 4 |
| **Cleanliness** | 4 |
| **Food is treated/processed** | 3 |

Labeling

We tested a variety of labeling conventions in different regions, to see if identifying food with labels such as "pasture raised," "organic," or "fair trade" had any impact on buying local. Understanding how to "brand" locally produced and grown food will be a central piece to a national framework for buy local campaigns FoodRoutes Network develops. It is useful, therefore, to explore what these labels mean to people.

Overall, people are generally unfamiliar with a variety of labeling conventions. For instance, in the greater Philadelphia region, a plurality of consumers says that terms such as "pasture-raised" or "grass fed" made no difference or they were not sure if they made a difference when thinking about purchasing meat or poultry, suggesting that education needs to precede efforts of persuasion.

**Likelihood of Buying Meat and Poultry**
(Percent Responding)
Greater Philadelphia

| | **Very/somewhat important** | **No difference/Don't know** |
|---|---|---|
| **Pasture raised** | 36 | 49 |
| **Grass Fed** | 35 | 52 |
| **Organic** | 31 | 50 |
| **Free range** | 27 | 57 |

In Santa Cruz, where the population is more amenable to buy local efforts and more familiar with alternative food systems, people are slightly more positive towards labels such as "Fields to Ocean" or "Organic. But more education is required before these or other labels have a substantially positive impact on local buying behavior. A slim majority of consumers (54 percent) say an "organic" label would make them more likely to buy a product (only 24 percent much more likely). Even though Santa Cruz County is a politically liberal area where people have relatively high levels of concern about the environment, the organic label still appeals to a limited segment of consumers. Focus groups can be helpful in testing alternative labels and identifying the key visual components of an effective label.

**Likelihood of Buying with Specific Labels**
(Percent Responding)
Santa Cruz County

| | **Much/Somewhat More Likely** | **No difference/ Don't know** |
|---|---|---|
| **Organic** | 54 | 32 |
| **Fields to Ocean** | 48 | 40 |
| **Fair Trade** | 37 | 52 |

Regional Differences

As was noted at the outset, there is remarkable continuity across these four regions of the country in attitudes and behaviors toward buying locally produced food. That said, there are regional variations that speak to some of the broader differences we will likely see as buy local campaigns expand across the country.

Santa Cruz County demonstrates the strongest initial support for buy local efforts. Forty five percent of Santa Cruz residents say they buy local weekly, compared to 28 percent in Louisiana, 22 percent in Philadelphia and 18 percent in Blackhawk County. Forty percent of Santa Cruz residents say they look at labels frequently to see where food is produced or grown compared to 33 percent in Baton Rouge, 27 percent in Philadelphia and 26 percent in Blackhawk County.

In Santa Cruz County, consumers are predisposed to favor a buy local campaign, which may be related to the fact that the area is more politically liberal and health and environment conscious. For instance, 36 percent of Santa Cruz residents call themselves liberal, compared to 21 percent in Blackhawk County, 19 percent in Baton Rouge, and 26 percent in Philadelphia. These Californians are also more likely to say they follow environmental issues in their neighborhood and community and express concern about the presence of chemicals and pesticides in their food.

These results suggest that culturally, Santa Cruz residents are simply more aware and interested in alternative food systems, despite the fact that they are no more likely to shop in farmers markets or at cooperative farms. At the same time, by the close of the survey, the differences among the areas disappear, suggesting that this cultural affinity for buying local is not necessary to persuade people to buy local.

**Importance of Buying Local By Area**
(Percent Responding)

| | Santa Cruz County | Blackhawk County | Baton Rouge | Philadelphia Metro Area |
|---|---|---|---|---|
| **Total Important** | 86 | 84 | 78 | 81 |
| **Total Not Important** | 13 | 16 | 19 | 17 |

It is interesting to note as well that residents in Blackhawk County are the least supportive of the buy local efforts. This result is somewhat surprising given the prominence of agriculture in the local economy and the proximity most residents have to farmers. More than two-thirds of Blackhawk County consumers report that they either know a farmer personally (57 percent) or farm themselves (8 percent). There clearly is some skepticism among these Iowans, who are less likely to follow local environmental issues and less concerned about food safety and the presence of chemicals and pesticides.

It is difficult to speculate without more research, but it is possible that people who are close to farming and agriculture have a greater level of knowledge and acceptance of pesticides and other treatments used in growing food. These Iowans are the least persuaded by messages stating that buying local either protects the environment or produces healthier food because local farms use fewer chemicals and pesticides. Rather, they are persuaded by the economic messages arguing that buying local will save the family farm.

Target Shoppers

The information and messages about locally produced and grown food moves people broadly to a supportive position. Nearly all groups of consumers are open to persuasion on this issue. There are, however, groups that are disposed to buy local and move in substantial numbers to our position. We find across the regions of the country that women who are the primary shoppers in the home are more likely to support buy local efforts.

Older women, in particular, are more likely to say it is important to buy local and to shift to an even more supportive position by the end of the survey. They are more concerned about food safety and follow local environmental issues more closely than men or younger women (defined as women under 50). These women spend more time shopping, eat out in restaurants less frequently and eat prepared food less often.

In concert with the buy local groups, we also identified a number of targets in specific regions that are worth noting because they may be instructive for other areas (see Appendix B for complete list of regional targets). In Santa Cruz County, people who garden are more supportive of buy local efforts than those who do not.

- **People who garden.** In addition to growing their own produce, people who have a fruit or vegetable garden at home are favorably inclined to purchase locally grown food. At the outset, 74 percent of them consider buying locally grown food important (32 percent very important). Their support for buying local expands to a near unanimous 92 percent (51 percent very important).

In Baton Rouge, religious people are more supportive of buy local efforts than residents who do not attend worship services regularly.

- **Frequent Churchgoers.** At the outset, 69 percent of people who attend church weekly say it is important to buy local (32 percent very important), which increases to 85 percent after hearing the messages (48 percent very important). It is important to note that frequency of attending church is the key factor, now whether the consumer is Protestant or Catholic.

Finally, in Blackhawk County, people who knew farmers personally expressed greater support for buy local efforts.

- **Closeness to farming.** People who know farmers are more likely to think it is important to buy locally produced and grown food (64 percent very or somewhat important) than people who do not know any farmers personally (53 percent very or somewhat important). Among people who know farmers, 88 percent think it is important to buy local by the close of the survey (compared to 74 percent among people who do not know farmers). It is important to note that they are more likely to say they buy locally produced and grown food; they do not buy it more frequently.

These three suggest that engagement with community, and communities that care about agriculture, are related to a more supportive position toward buying local and more receptivity toward arguments supporting buying local. As FoodRoutes Network embarks upon developing a national framework for buy local campaigns, making connections with people already tied to supportive communities will be an important avenue for activism.

## Communications and the Messengers

People report that advertising on television has the biggest impact on their food purchasing decisions, though advertising in this medium may be beyond the resources of the local campaigns. Consumers name newspaper advertising and displays inside stores as the next most influential advertising media for their food purchasing decisions. As FoodRoutes Network considers "branding," it will be important to carefully consider the use of labels and in-store signs. These are the primary ways people identify locally produced and grown food when they do not shop at specialty outlets such as farmers' markets.

**How People Identify Food**
(Percent Responding)

| | |
|---|---|
| Where I buy it | 27 |
| Label on product | 27 |
| Sign that states it is locally grown | 18 |
| Personal knowledge of product | 13 |
| In-Store promotion | 6 |

People generally trust the messengers who have credibility on health and nutrition issues (nutritionists) and those closest to food production (local farmers). Local chefs also carry significant weight as messengers on local food purchasing. Focus groups will determine whether these messengers are the best vehicles for carrying the messages identified in this survey as the key components of a buy local campaign.

## APPENDIX A

*Buying food that is produced or grown locally supports the local economy by keeping farms in the community, providing revenue to other local businesses, and reducing our need to import food from other states or countries.*

*Buying food that is produced or grown locally supports endangered family farms, which are an important part of the American tradition of self-sufficiency and the foundation of local communities.*

*Buying food that is produced or grown locally supports family farmers as opposed to large, corporate-owned farms that don't create good local jobs or support the local economy.*

*Buying food that is produced or grown locally helps protect the environment because local farmers use fewer of the pesticides and chemicals that pollute our drinking water, rivers, and streams.*

*Buying food that is produced or grown locally is fresher and better quality than food imported from other states or countries.*

*Locally produced or grown food is safer and healthier because small, local farmers use fewer chemicals to produce food since the food is fresh off the farm.*

*Locally grown food is safer because local family farms are less of a target for chemical attacks by terrorists than large consolidated farms.*

*Locally grown food fits best with the traditional recipes we use in our family.*

APPENDIX B

Target Groups

Blackhawk County, Iowa

- **Older women (29 percent of the population)**. Older women (50+ years of age), as was noted earlier, are generally more inclined to buy local than other consumers. Sixty-nine percent say buying local is important at the start of the survey, which increases to 85 percent by the close of the survey. Eighty-eight percent of older women describe themselves as the primary shopper in their household, compared to 58 percent of older men (50+ years of age).

- **Older residents and Senior Citizens (50 percent of the population)**. Older residents are more supportive of buy local than younger residents, and they remain the most supportive overall by the close of the survey. For instance, 67 percent of people aged between 50-64 say that it is important to buy local, which increases to 87 percent by the close of the survey. Three quarters of older residents and seniors consider themselves primary shoppers.

- **Married women (30 percent of the population).** At the outset, married women are more likely than other groups to think it is important to buy local. A majority (68 percent) thinks it is important to buy locally produced and grown food, which rises to 89 percent by the close of the survey. Eighty-nine percent call themselves the primary shoppers, compared to 53 percent of married men.

- **College educated men** are a secondary target group. They are broadly supportive of buying local – 60 percent think it is important to buy local, which rises to 88 percent by the close of the survey. But they are not the primary shoppers in the household (59 percent) compared to college-educated women (91 percent), and they are no more likely to look at labels than their female counterparts. In sum, there is nothing about their behavior that makes them likely to be more supportive of buy local efforts. Rather, attitudinally, they are more politically liberal and familiar with farmers and farming issues, which appear to make them more supportive of the buy local efforts.

Baton Rouge

- **Older women (19 percent of the population)**. Older women, as was noted earlier, are generally more inclined to buy local than other consumers. Initially, 73 percent of older women (50+ years old) say it is important to buy local (32 percent very important), which increases to 88 percent by the close of the survey (51 percent very important).

- **African Americans (30 percent of the population).** African Americans are more likely than whites to think it is important to buy local, but they are no more likely to use farmers markets and less familiar with Red Stick Farmers' Market. Initially, 65 percent of African Americans say it is important to buy locally grown food (27 percent very important), which rises to 80 percent at the end of the survey (50 percent very important). A majority (56 percent) of African American consumers live in the western part of the region. They have lower incomes and spend less on groceries, so price is a definite issue, but they place high importance on buying locally produced food.

- **Frequent Churchgoers (52 percent of the population).** At the outset, 69 percent of people who attend church weekly say it is important to buy local (32 percent very important), which increases to 85 percent after hearing the messages (48 percent very important). It is important to note that frequency of attending church is the key factor, not whether the consumer is Protestant or Catholic.

Santa Cruz County

- **Young women (33 percent of the population)**. Young women (under 50) move in high numbers towards believing that buying locally produced food is important. Initially, 69 percent of young women believe it is important to buy local (28 percent very important). Their support for buying local increases to 88 percent (45 percent very important) by the end of the survey. These young women are very likely to be their household's primary shopper, and they tend to spend more money on groceries than other people, which is partly attributable to many of them having children at home.

- **Santa Cruz City (36 percent of the population).** People who live in the city of Santa Cruz consider buying locally grown food important (71 percent, 29 percent very important), and the more information they hear, the more important they consider buying local. At the survey's close, 89 percent of them consider buying local important (46 percent very important). Residents of Santa Cruz city are among the most politically liberal people in Santa Cruz County.

- **People who garden (35 percent of the population).** In addition to growing their own produce, people who have a fruit or vegetable garden at home are favorably inclined to purchase locally grown food. At the outset, 74 percent of them consider buying locally grown food important (32 percent very important). Their support for buying local expands to a near unanimous 92 percent (51 percent very important). Nearly two-thirds (65 percent) of people who garden at home are married and 37 percent of them are married with children. They are evenly split along gender lines – 50 percent men and 50 percent women.

Philadelphia Metro Area

- **Older women (25 percent of the population)**. Older women, as was noted earlier, are generally more inclined to buy local than other consumers. Fifty-six percent say buying local is important at the start of the survey, which increases to 87 percent by the close of the survey. Ninety-three percent of older women describe themselves as the primary shopper in their household, compared to 59 percent of older men.

- **College women (14 percent of the population).** College educated women move in relatively high numbers towards a position supportive of buying local. Initially, only 44 percent think it is important to buy local. Their support rises by 38 points to 82 percent by the close of the survey. Seventy eight percent of college-educated women describe themselves as primary shoppers compared to 64 percent of college-educated men.

- **Married women (30 percent of the population).** At the outset, married women are more likely than other groups to think it is important to buy local. A majority (51 percent) thinks it is important to buy locally produced and grown food, which rises to 85 percent by the close of the survey. Eighty-eight percent call themselves the primary shoppers, compared to 52 percent of married men.