Wisconsin Consumers & Local Food

Marketing recommendations for direct market farmers

A research team from the University of Wisconsin-Extension sought to better understand the opinions and behaviors of Wisconsin consumers when it comes to local food. The goal of the project was to generate marketing recommendations to support local food. A mail survey went to a random sample of Wisconsin homes in July 2015 with 691 surveys returned. This brief is primarily informed by responses of people who reported they do half or more of the household food shopping (642 responses).

About 60% of respondents were female, on average the household income was between $50,000 and $74,999 (the median household income for Wisconsin falls in this range), and on average, respondent age was between 55 and 64. Politically, the sample was evenly distributed among conservatives, moderates, and liberals. Most respondents were white, which means results could be less applicable to farmers who serve a diverse customer base; additional research would need to investigate that.

Wisconsin = Local

Most Wisconsin consumers (86%) agree that food grown in Wisconsin is local. Many (75%) consumers also feel that food grown within 50 miles and/or a one-hour drive from them is local. However, when the distance is larger (100 miles and/or a two hour drive), only 56% consider such food to be local. There is widespread agreement that food from states neighboring Wisconsin is *not* local. This does not change by region in the state, with the exception that over half (58%) the consumers in the North West do consider Minnesota to be local.

Consumers Buy More Local Dairy, Less Local Meat

Respondents rated how often they purchased local products on a 5-point scale, where a 1 meant “Never” and a 5 meant “Always.” On average, local dairy is purchased “often” (a 4 on the scale). Local eggs, vegetables, and fruit are purchased between “sometimes” and “often.” Packaged goods, beef, chicken, and pork are purchased less, closest to a 3 on the scale (corresponding to “sometimes”).

Most Consumers Say They Will Pay a Premium for Local

When comparing how much they would pay for a 5-pound bag of potatoes labeled “Wisconsin” to potatoes labeled “USA,” about 60% of respondents said they would pay more for local potatoes, 30% would pay the same, and 6% would pay less. Of those willing to pay more, $1.00 more was most often selected. The percentages do not total 100 because 4% of the sample did not respond to this question.

Local Trumps Organic

Respondents rated how different attributes of produce influence their purchasing. “Fresh” was most important, followed by “taste.” Being grown in Wisconsin was not as important as price or convenience, but more important than organic. There are likely particular groups of consumers, however, for which organic certification is very important. This question used a 5-point scale, with a 1 meaning “Not at all” and a 5 meaning “A great deal.” The averages are shown in parentheses in the box to the right.

Attributes that Influence Produce Purchase

1. Fresh (4.6)
2. Taste (4.4)
3. Appearance (4.2)
4. Convenient place to buy (3.8)
5. Low price (3.7)
6. Wisconsin grown (3.0)
7. Grown without chemicals (2.8)
8. Pre-cut or pre-washed (2.4)
9. Certified organic (2.2)

Statistics note: All items are significantly different from each other, except for “convenient place to buy” and “low price.”

Friends & Family Are Influential

There was a strong correlation between buying local produce and believing that others, including friends and family, buy local produce. Having positive attitudes about local (e.g., that local produce is safer or healthier) was also strongly associated with purchasing, but not as much as the belief that others buy local produce.

Local is Fresh & Tasty

Consumers agree that local produce, compared to non-local, is fresher, tastier and helps local farmers more. That is good news, considering the most important attributes for produce in general were that it is fresh and tasty. Messages related to these points may resonate with most consumers. These attitudes were rated on a 5-point scale. For other characteristics of local produce, consumers rated it to have certain qualities only "somewhat" more than non-local products (a value of 3 on the scale). These qualities were: healthier, safer, containing fewer chemicals, and reducing pollution.

Local Produce vs. Non Local is…

1. More helpful to local famers (3.9)
2. Fresher (3.8)
3. Tastier (3.5)
4. Creates more local jobs (3.3)
5. Healthier (3.0)
6. Leads to fairer food production (3.0)
7. Grown with fewer chemicals (3.0)
8. Safer to eat (3.0)
9. Reduces pollution more (3.0)
10. Grown with conservation practices (2.8)

Statistics note: Items not significantly different from each other include 1 and 2, 5 to 9, and 8 to 10.

Challenges to Buying Local

Respondents were asked about challenges to buying local produce, including price, being able to identify it at the store, and it being more time consuming to buy (due to extra shopping trips or time to read labels more carefully). About 40% felt challenged by identifying local produce, noting they could do this "not at all" or "very little." Local produce being more expensive and more time consuming to find were rated on average as about a 3 ("somewhat") on a 5-point scale.

Interest in Roadside Stands & CSA

About 30% of the sample said they bought food from a roadside at least "sometimes," with 6% of them saying they do so "often" or "always." Consumers were also asked about community supported agriculture (CSA), which is when customers buy a farm "share" and receive boxes of food during the harvest season. Only 6% of said that they or someone in their house has a CSA, but nearly 50% were familiar with how CSA works and about 30% were interested in learning more.

Awareness and Interest in CSA (%)

	Yes	No	Unsure
Understand how CSA works	47	23	27
Interested in CSA	27	43	27
Know where to find info	36	36	25
Pickup is convenient	17	18	62
See a financial benefit	15	24	57
Would only buy if organic	17	42	37
Have share now	6	72	19
Had share in past	12	66	18

Percentages do not total 100 because not everyone answered the question.

Comparing Consumer Groups

1. No matter how consumers buy local food, demographics are similar: Of consumers who buy local food, three groups were compared: consumers who shop at farmers' markets but do not have a CSA, consumers with a CSA, and consumers who primarily buy local food at the store (this group does not have a CSA and infrequently shops at farmers' markets). Demographics between the three groups were consistent, including age, gender, weekly food budget, income and education, political ideology, and household size. There were also not differences in beliefs about how time consuming local produce is to find, or beliefs that local produce is more or less expensive.

Farmers' market and CSA customers are more similar to each other, however, than customers who buy local primarily in stores. Farmers' market and CSA customers buy more local produce, are more likely to go to a restaurant that features local food, see more benefits to local produce, and are more aware of local food issues. They also talk more about local food, find local food easier to identify at the store, cook more fresh food, enjoy trying new food more, and rate organic certification as more important than the store group.

The customers who buy local primarily from stores also have differences from the farmers' market group: the store group enjoys cooking less, tries new recipes less often, and believes others buy less local produce. Lastly, CSA customers had some unique characteristics: They pay more attention to information about food in social media and the news than the other groups, they report being willing to pay a higher premium for local than the store group, and they rate produce being grown without chemicals as a more important characteristic than the store group.

2. Local food beliefs and challenges vary by Wisconsin region: Respondents were divided into regions based on where they live. The average responses for each region were compared to state averages without that region.

Wisconsin Dept. of Tourism map, available from http://www.travelwisconsin.com/maps

- *Central*: These consumers have a reduced weekly food budget compared to the rest of state. Consumers here also report getting less information about food from the news, and that certified organic is an attribute less important to them.
- *East Central*: These consumers noted finding local produce is more time consuming than the rest of the state and that low price is a more important attribute. They also said local promotes conservation more than others in the state.
- *North East and North West*: In both regions, consumers rate the benefit of local food in terms of helping local farmers at a lower level than the rest of the state.
- *South Central*: Local food is reported to be more expensive here. These consumers cook fresh food more often, like to try new food more than the rest of the state, understand and buy CSA more, and buy slightly more local produce. Organic is also rated as more important here than in other parts of the state.
- *South East*: This region buys as much local produce as the rest of the state, but a little less when it comes to non-produce local products. Wisconsin grown is rated as less important here, and there is less awareness about local food and less understanding of CSA. On the other hand, consumers here rate local produce as less expensive than other parts of the state do, and they report a higher weekly food budget.
- *South West*: In this region, consumers say taste is a more important attribute for produce than consumers in the rest of the state do.

3. Conservatives, Moderates, and Liberals all buy local: The sample was divided based on responses to two questions about social and economic ideology. These items were on a 5-point scale where a 1 meant "Very conservative," a 3 meant "Moderate," and a 5 meant "Very liberal." Consumers who rated themselves at the midpoint on average were counted as moderates (31%), those below a 3 were counted as conservatives (40%), and those above a 3 were counted as liberals (27%). Percentages do not total 100 because not everyone answered this question. Their responses revealed that one group is not more likely to buy local produce or non-produce local products than the other. No group is more likely to patronize a farmers' market, roadside stand, or buy a CSA. However, the liberal group reports they will pay more of a premium than moderates or conservatives for local produce. The liberal group also sees more benefits of local produce, compared to non-local produce. In particular, liberals rated local produce benefits (when compared to non-local produce) as higher in terms of pollution reduction, leading to fairer food production, and making people healthier. This means that messages related to helping local farmers, freshness, and taste may be the most universal.

4. Households with children are interested in local, but buy less: Respondents with children in their home report more supportive attitudes when it comes to local food on some points (e.g., that local produce reduces pollution and helps farmers more) than respondents without children in their home. There were not differences in attitudes about local produce being healthier, however. Respondents with children also indicated they were willing to pay a higher premium for local than the other group.

However, they ranked “Wisconsin grown” as a little less likely to factor into purchasing decisions, and reported buying slightly less local produce. A reason for this may be that they feel more challenged when it comes to local - they rated it as more expensive and time consuming too. They buy as many non-produce local products however. Notable communication differences were that those with children pay less attention to information about food in the news, but more attention to information about food in social media. With demographics, the group with children was similar to the other group in political ideology, but the group with children was younger, had more income, and had more education. Respondents likely to have *young* children (these respondents were between 18 and 44 years old, do half or more of the food shopping, and have children in the house) were also compared to the rest of the sample. The same trends were observed with one additional difference. For the group likely to have young children, organic certification was more important than for the rest of the sample (a 2.49 on a 5-point scale for the group with young children compared to a 2.17 for others).

5. Chemical-free produce is more important to frequent farmers’ market shoppers: Three groups based on frequency of buying food at farmers’ markets were compared. The first group “always” or “often” gets food at markets (when in season). The second group does so “sometimes,” and the third group does so “rarely” or “never.” Demographics for all groups were similar. However, the frequent market shoppers report more local produce purchasing, believe that others buy more local produce, are more aware of local food issues, and talk more about local food than the occasional market shoppers, who do those things more than the infrequent shoppers. The frequent shoppers also see more benefits to local produce than the occasional shoppers when it comes to fairness in food production and conservation (they rated other benefits of local produce similarly, however). The frequent market shoppers reported that produce grown without chemicals (but not certified organic) was more important than the other groups. On average, they rated this a 3.4 out of 5, while the occasional shoppers rated this as a 2.8. Organic certification was also relatively more important to the frequent group than the infrequent group, though it still did not rank particularly high for them (a 2.7 out of 5). Lastly, frequent and occasional market shoppers, when compared to the infrequent group, where similar on some points: they buy more non-produce local products, report willingness to pay more of a premium for local, cook more fresh food, and enjoy trying new food more.

6. Former and current CSA members are similar: The 40 respondents who currently have a CSA share were compared to the 50 respondents who had one in the past but currently do not. Only a few differences were detected: current CSA members rated how much local produce makes people healthier as higher, a 3.7 out of 5, while former members only rated this as a 3.0. About 60% of current members said they wanted to learn more about CSA, compared to only 28% of former members. Lastly, current CSA members pay more attention to information about food in the news and in entertainment shows than former members.

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