Wisconsin Consumers & Local Food

Marketing recommendations for restaurants & retailers

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 those 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)

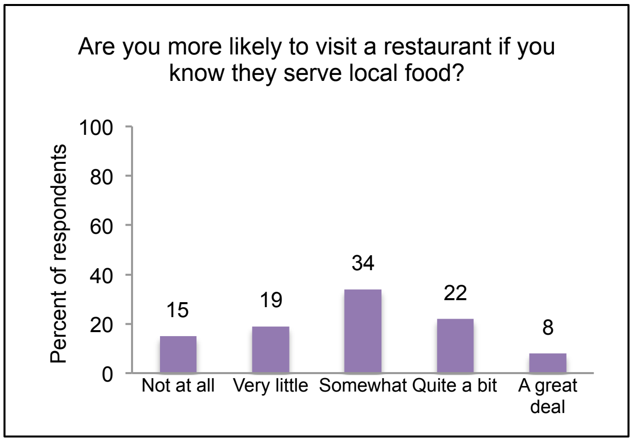
Statistics note: Items not significantly different from each other include 1 and 2. 5 to 9. and 8 to 10.

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.

Comparing Consumer Groups

1. Most consumers are at least "somewhat" more likely to visit a restaurant that serves local food: While 64% of the sample said they were at least "somewhat" more likely to visit a restaurant that serves local, 30% were "quite a bit" or "a great deal" more likely to do so. The graph to the right shows the percentages (they do not total 100 because not everyone answered this question). Consumers were divided into 3 groups based on these categories. The first group is "not at all" or "very little" more likely to visit a restaurant serving local, the second group is "somewhat" more likely to do so, and the third group is "quite a bit" or "very little" more likely to.



The more likely group – those who were "quite a bit" or "a great deal" more likely to visit a restaurant with local food – said they will pay more of a premium for local, are more aware of local food issues, talk about it more, buy more local produce, enjoy trying new food more, and see greater benefits to local produce than the "somewhat" likely group, who come out higher on those factors than the not likely group (those who said they were "not at all" or "very little" more likely to visit a restaurant with local food). In terms of attributes of produce that are important, produce being grown without chemicals followed this same pattern (the more likely group gave chemical-free a 3.6 out of 5, compared to a 2.8 for the somewhat group and a 2.2 for the not likely group). Produce being certified organic also followed this pattern, though it was relatively less important (the more likely group only gave this a 2.8). Compared to the somewhat and more likely group, the not likely group believe others buy less local produce and they pay less attention to food information in the news, entertainment, and social media. They also have less income. In terms of other demographic measures, the more likely group is younger and politically more moderate than the somewhat and not likely group, who trend a little more conservative.

2. There are differences in customers based on how often they shop at organic or natural stores/cooperatives: Most shoppers (76%) go to organic or natural stores or cooperatives infrequently ("never" or "rarely"). About 12% go there sometimes, and 7% go there frequently ("often" or "always"). Percentages do not total 100 because not everyone answered the question. The frequent and sometimes group do or believe several things more than the infrequent group, such as: buy local produce, pay a higher premium for local, rate local produce as having benefits over non-local produce, try new recipes, cook fresh food, and enjoy trying new food.

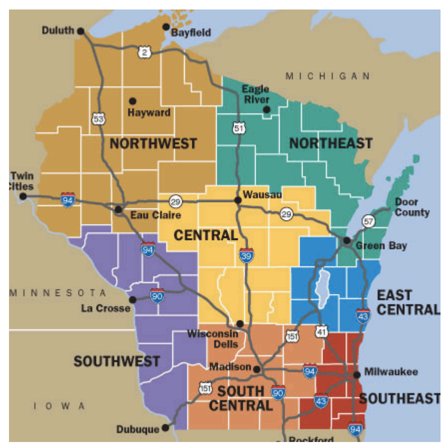
Regarding attributes of produce, there are not differences in how the groups rank freshness, taste, and appearance. However, the frequent and sometimes group rate Wisconsin grown as more important than the infrequent group, and all groups rate organic certification, being chemical-free, and low price differently. The chart to the right shows the ratings.

	Degree of shopping at organic/natural stores		
Attribute	*Frequent*	*Sometimes*	*Infrequent*
No chemicals	4.0	3.5	2.5
Cert. organic	3.8	3.0	1.9
Wisconsin-grown	3.6	3.3	2.9
Low Price	3.0	3.5	3.8

The degree to which attributes influence purchasing are measured on a 5-point scale where a 5 means "a great deal" and a 1 means "not at all."

With communication, the three groups get information about food from the news or entertainment shows equally, though the frequent group uses social media more then the infrequent group. They all get information about food from signs at grocery stores equally, though the frequent group gets information more from store staff than the other two groups. Together, the frequent and sometimes groups also get more information by talking to farmers than the infrequent group. With demographics, all three groups are similar in age, gender, household size, and number of children. Politically, the infrequent trends conservative, the sometimes group is moderate, and the frequent group trends liberal. While there are not differences in income, the weekly food budget of the frequent group is higher.

3. 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, 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. On the other hand, consumers here rate local produce as less expensive and they report a higher weekly food budget.
- *South West*: In this region, consumers say taste is a less important attribute for produce than consumers in the rest of the state do.

4. 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, so it is assumed they buy local at a store). All demographics among the groups were consistent. 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. They 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. The customers who buy local primarily from stores had differences from the farmers' market group: the store group enjoys cooking less, tries new recipes less often, and believes others buy less local produce.

5. 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. 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 messages related to helping local farmers, freshness, and taste may be the most universal.

6. 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.

Acknowledgements & Authors

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