Wisconsin Consumers and Local Food
2015 Survey Results

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Project Background

- UW-Consortium for Extension and Research in Agriculture & Natural Resources
  - Partner: David Trechter, UW-River Falls
- Goal: Recommendations that will increase local food purchasing and/or willingness to pay a premium
Survey Development

- Literature review
- Online feedback from UWEX Community Food Systems Team (and others)
- FairShare input
- Pilot testing
Community Food Systems Team

- 21 responses
- Many suggestions:
  - food vs. grocery
  - fruit & veg vs. produce
  - appearance vs. clean

Respondents:
- Columbia
- Crawford
- Dane
- Portage
- Price
- Racine
- Sawyer
- Statewide
- Walworth
- Waushara
- Winnebago
Results - Demographics

- 691 respondents
- Primary food shopper (642)
- 55 - 64 on average
- 59% female
- Primarily white
- 40% conservative, 32% moderate, 28% liberal
- Income $50,000 to $74,999
- More than high school, less than 4-year degree
- 31% city, 30% small town, 14% suburb, 22% rural
Scope

- This is a broad look
- You are experts in what’s happening in your community, your experience may be different
Wisconsin Means Local

- **86%** a Wisconsin
- **75%** b 50 miles or 1 hr. drive
- **56%** c 100 miles or 2 hr. drive
- **24%** d Minnesota
- **21%** d Michigan
- **18%** d Illinois
- **16%** d Iowa
More Dairy, Less Meat

- 4.1 a dairy
- 3.9 b eggs
- 3.8 b vegetables
- 3.7 b fruit
- 3.3 c beef
- 3.2 c packaged goods
- 3.3 cd chicken
- 3.1 d pork

Scale:
1 = Never
2 = Rarely
3 = Sometimes
4 = Often
5 = Always
Local Gets a Little Premium

18. If a 5-pound bag of potatoes labeled “USA” costs $2.00, what is the most you would pay for a 5-pound bag of potatoes labeled as being from Wisconsin? Check one.

<table>
<thead>
<tr>
<th>Less than $2.00</th>
<th>$2.00</th>
<th>$2.50</th>
<th>$3.00</th>
<th>$3.50</th>
<th>$4.00</th>
<th>$4.50</th>
<th>$5.00</th>
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- 30% will pay the same for USA as local
- 60% will pay the more for local with $3.00 being the most frequent choice
- 6% expect to pay less for local than for USA
Local Trumps Organic

- **4.6** a fresh
- **4.4** b taste
- **4.2** c appearance
- **3.8** d convenient place to buy
- **3.7** d low price
- **3.0** e Wisconsin grown
- **2.8** f grown without chemicals
- **2.4** g pre-cut or pre-washed
- **2.2** h certified organic

Scale:
1 = Not at all
2 = Very little
3 = Somewhat
4 = Quite a bit
5 = A great deal
Local Trumps Organic

Local Trumps Organic

Consistent with other research:

Local is Fresh & Tasty

- 3.9 a helps local farmers
- 3.8 a fresher
- 3.5 b tasty
- 3.3 c supports local jobs
- 3.0 d healthier
- 3.0 d fairer food production
- 3.0 d fewer chemicals
- 3.0 d safer
- 3.0 de reduces pollution
- 2.8 e conservation

Scale:
1 = Not at all
2 = A little bit
3 = Somewhat
4 = Quite a bit
5 = Very much
Local is Fresh & Tasty

Other studies…

- New England: freshness, taste, and supporting farmers as the top three choices for buying local food
- Michigan: “Quality” was the most popular reason people shopped at farmers’ markets, with availability of organic or pesticide free produce ranking last


Challenges to Local

- 2.9 a  Time consuming
- 2.9 a  More expensive
- 2.7 b  Can ID local at the store
- 2.0 c  Less expensive

Scale:
1 = Not at all
2 = A little bit
3 = Somewhat
4 = Quite a bit
5 = Very much
Friends & Family Matter

- **Attitudes vs. Norms**
  - Friends and family buying local is more influential than positive attitudes about local food purchasing
Social Norms

- Humans tend to look toward others to guide behavior
  - Subjective – What we perceive others think we should do
  - Descriptive – What we think people actually do
Social Norms

- Effectiveness depends on people internalizing norms
  - Norm is how people ‘should’ behave
- Examples: Friends, family, neighbors, community leaders
Norms - Example

- 75% of Wisconsin consumers think local fruits and vegetables are fresher. Join your neighbors and buy local today!

- 75% of Wisconsin consumers think buying local fruits and vegetables help our local farmers. Join your neighbors and support our local farms!
A Third Interested in CSA

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

- 5.8% respondents have a CSA in the household
- Close to estimation using USDA and other figures (4.2%)
Information Sources for Food

- **More:** Signs, cookbook, food/cooking website
- **Middle:** books, grocery staff
- **Less:** gov, nonprofit, farmers, events, QR code
Segmentation

- Divide population into groups more like each other than other segments
- “Differential responsiveness” most crucial criterion
- Prioritize segments with highest incremental response to marketing effort
Comparing Consumer Groups

Are these groups different?

1. Region of the state
2. Political ideology
3. Age & income
4. Shopping venue
Groups - Based on Region

less CSA, certified organic less imp., less weekly food budget

Taste is more important

more CSA, local produce, more expensive

less likely to say local helps farmers. NE understand CSA less

local food more time consuming to find

less local
Groups - Southeast

- Buy fewer local non-produce items
- Less favorable attitudes and awareness
- Higher income & food budget
- Is it a suburban effect? Suburbs also less likely to buy local non-produce items, and have attitudes less favorable to local
Groups - Based on Region

more super store
less supermarket

more super store and convenience store

No differences

more convenience store and small grocery store

more super store and convenience store

less convenience store, super store, small grocery store

more super market
Groups - Ideology

- Moderates moderates (31%), conservatives (40%), liberals (29%)
- Similar: buy local, CSA, go to FM
- Liberals – more premium, see more benefits
- Universal: taste, fresh, helps farmers
Groups - Income

- No differences in buying local
- No differences in visiting FM
- More income - more premium, higher weekly food budget, more fresh cooking, more often try new food
- Less income - low price more important
Groups - Age

- Younger (25-44) buy less local produce (though not other local)
- No differences in going to FM
- Younger more more willing to pay a premium for local, see more benefits to local produce
Groups - Shopping Venue

3 groups among local food buyers:

1. Grocery store
2. CSA
3. Farmers’ market shoppers
Groups - Shopping Venue

Similarities:
- Age
- Gender
- Number of children
- Household size
- Weekly food budget
- Income and education
- Political ideology
- Definition of local food
- Belief that local produce is time consuming to find
- Belief that local is more/less expensive
Groups - Shopping Venue

Farmers’ market and CSA customers are more similar than the store shoppers

- Buy more local food
- More likely to go to a restaurant that features local food
- Stronger attitudes about the benefits of local produce
- Talk more about local food
- Believe others buy more local produce
- Ethical or political considerations with food shopping
- Use more info sources to learn about food
- Cook more fresh food and enjoy trying new food more
Recommendations

1. Universal themes - Wisconsin, support local farmers, fresh, tasty
2. Don’t make it political
3. Highlight norms
4. Store labels – low fruit?
5. Regional challenges
Next Steps

1. Feedback from practitioners and farmers

2. Outreach materials for farmers (see draft)

3. Continue to explore these findings... look for our report in March!
Thank You!

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