Farmers Market Shopper Research

February 2022
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Research Objectives

1. To understand shopper perceptions and purchase drivers of farmers markets

2. Understand shopper behaviors and attitudes about local food, pre and post pandemic.

3. To measure awareness and associated value of various agricultural/animal welfare practices and product designations

4. To understand specific messaging that will resonate with shoppers
Methodology

“Know Farms, Know Food” survey administered Oct 2021 to FRESHFARM subscriber list and partner organization support
- Respondents given $5 gift card
- 5% response rate

December focus groups
- Group #1: Highly engaged shoppers
  - purchase almost all food from market and attend 4+ times per month
- Group #2: Minimally engaged shoppers (more price sensitive)
  - Purchase “some” or “very little” food from farmers markets
- Respondents given $50 gift card
Know Farms,Know Food
Survey Results

- Who took the survey?
- What are their shopping habits?
- Shopping attitudes
- Food system views pre/post pandemic
- Awareness/attitudes on agricultural terms
A majority of participants live in DC, while the remainder are evenly split between MD & VA.
Nearly all participants shop at farmers markets.
The survey was distributed broadly, with 24% claiming no association with FRESHFARM
Shopping Habits
There is a large segment of shoppers (41%) purchasing most if not all of their monthly food purchases from markets.
Two shopper segments emerged from the data: the highly-engaged and the less-engaged shopper.
73% of shoppers attend markets on a regular basis.
There are 3 primary barriers to growth: Selection, Convenience & Price.

What is the primary reason you don’t purchase more of your weekly groceries at a farmers market?
988 responses

- Selection: 42.6%
- Convenience: 22%
- Price: 25.9%
- Food is more expensive at the farmers market...
- The farmers market doesn’t offer ever...
- The market hours aren’t convenient fo...
- The market locations aren’t convenien...
- I prefer the quality of food at my grocer
- n/a
- Some prices, changes to shopping ha...
- I never know when they are! They’re n...
Among the highly-engaged shopper, selection was the #1 reason they didn’t shop more often.
Among the less-engaged shoppers, price plays a larger role than the highly engaged shopper for why they don’t shop more often.
A majority of shoppers purchase animal protein from farmers markets.

Do you currently purchase animal protein from your local farmers market? Animal protein includes meat, poultry, eggs, and dairy (milk, yogurt, and cheese).

988 responses

- Yes: 60.5%
- No: 39.5%
Shopper Motivations
When asked why they shop at farmers markets, value-based reasons play an important role.

“When thinking about WHY you shop at a farmers market, what are your top 3 reasons?”

- I want to support local farmers: 66%
- The quality of food is better: 44%
- The food is fresher: 36%
- I prefer local food: 34%
- I like to eat what's in season: 32%
- I like the community feeling: 26%
- I want to support sustainable agriculture: 22%
- I want to reduce my environmental impact: 13%
- The food is more nutritious: 12%
- There is a specific product I like: 8%
- The food chain is safer and shorter: 7%
When it comes to purchase decisions, farmer/producer welfare are the highest ranking responses.

"Please rate each statement below as it relates to your decision for making a purchase at a farmers market."

- Farmers make a living wage: 85%
- Produce was grown locally: 80%
- The money I pay the vendor goes directly in their pocket: 79%
- Markets provide opportunities for marginalized producers/farmers to sell their products: 77%
- Markets support a safer and more resilient food supply chain: 77%
- The produce grown uses sustainable growing practices: 75%
- Farmers/producers are knowledgeable about the foods they sold: 73%
- Food sold at markets is grown with minimal/no chemicals: 71%
- Farmers/producers are friendly to me: 69%
- The market accepts federal nutrition benefits, that help feed underserved families in my community: 64%
For animal protein vendors, while taste is an important consideration, animal welfare is a top purchase decision... even outranking price.
Food system views, pre/post pandemic
The pandemic has changed 53% of shopper opinions about the national food system.

53% have changed their views

- 40% of shoppers believe local food is more important now than ever
- 13% no longer believe the national food system is safe
Yet most visit the market the same amount as before the pandemic.
Relationship with farmers/vendors
Market shoppers are loyal, with 40% shopping from the same vendor every visit.
39% of people shop with the same vendor every visit because of the relationship they have established.

- 24% shop with the same vendor because they trust them
- 14% shop with the same vendor because they’ve developed a relationship with them
Growing or making their own products is one of the top reasons shoppers purchase from a vendor.

When thinking about the farmers/ producers that you purchase food products from, what are the three MOST IMPORTANT things that influence your purchase decision?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like the produces they offer</td>
<td>46%</td>
</tr>
<tr>
<td>They grow or make their own products</td>
<td>46%</td>
</tr>
<tr>
<td>Their prices are fair</td>
<td>44%</td>
</tr>
<tr>
<td>Their farm/business is local</td>
<td>44%</td>
</tr>
<tr>
<td>They don’t use chemicals in growing their food</td>
<td>39%</td>
</tr>
<tr>
<td>They grow their food using specific farming practices</td>
<td>29%</td>
</tr>
<tr>
<td>They don’t use GMOs</td>
<td>19%</td>
</tr>
<tr>
<td>They treat their workers fairly</td>
<td>11%</td>
</tr>
<tr>
<td>They are a business owned by someone from an under represented community</td>
<td>11%</td>
</tr>
<tr>
<td>They are a well established business</td>
<td>6%</td>
</tr>
<tr>
<td>They treat their workers fairly</td>
<td>.1%</td>
</tr>
</tbody>
</table>
Awareness/attitudes of agricultural practices
There is higher awareness and comprehension among shoppers for more mainstream agricultural terms.

Below is a list of various terms used when talking about how food products are grown, raised, processed, or labeled. How well do you know each term on a scale of 1-3?

<table>
<thead>
<tr>
<th>Term</th>
<th>Understand</th>
<th>Familiar, don’t fully understand</th>
<th>Don’t know term</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Antibiotic-Free</td>
<td>63%</td>
<td>32%</td>
<td>5%</td>
</tr>
<tr>
<td>2 Grass-Fed</td>
<td>63%</td>
<td>33%</td>
<td>4%</td>
</tr>
<tr>
<td>3 Certified Gluten Free</td>
<td>61%</td>
<td>34%</td>
<td>5%</td>
</tr>
<tr>
<td>4 USDA Certified Organic</td>
<td>58%</td>
<td>39%</td>
<td>4%</td>
</tr>
<tr>
<td>5 Pasture Raised</td>
<td>54%</td>
<td>38%</td>
<td>7%</td>
</tr>
<tr>
<td>6 Certified Non-GMO</td>
<td>53%</td>
<td>40%</td>
<td>6%</td>
</tr>
<tr>
<td>7 Sustainable Farming</td>
<td>52%</td>
<td>42%</td>
<td>6%</td>
</tr>
<tr>
<td>8 Fair Trade Certified</td>
<td>50%</td>
<td>42%</td>
<td>8%</td>
</tr>
<tr>
<td>9 Certified Humane</td>
<td>39%</td>
<td>47%</td>
<td>14%</td>
</tr>
<tr>
<td>10 Certified Naturally Grown</td>
<td>34%</td>
<td>48%</td>
<td>19%</td>
</tr>
<tr>
<td>11 Animal Welfare Approved</td>
<td>30%</td>
<td>45%</td>
<td>25%</td>
</tr>
<tr>
<td>12 Regenerative Farming</td>
<td>22%</td>
<td>37%</td>
<td>41%</td>
</tr>
<tr>
<td>13 Integrative Pest Management</td>
<td>21%</td>
<td>35%</td>
<td>44%</td>
</tr>
<tr>
<td>14 Biodynamic Farming</td>
<td>16%</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>15 Beyond Organic</td>
<td>16%</td>
<td>35%</td>
<td>49%</td>
</tr>
<tr>
<td>16 Polyculture Farming</td>
<td>15%</td>
<td>29%</td>
<td>56%</td>
</tr>
</tbody>
</table>
While Sustainable Farming rises in importance to shoppers, there is low awareness and consideration of practices that fall under the sustainability umbrella.
Focus Groups
Dec. 2021
Focus Group Objectives

• Understand differences between “highly engaged” and “less engaged”
• Understand motivations behind strong desire to support their local farmers
• Explore relationship shoppers want/have with vendors
• Test marketing messages – FF Story/FB Ad
• Understand attitudes re: sustainability
Focus Group Topline Learnings

- Two distinct shopper segments emerged, the highly engaged and the less engaged. We learned from the focus groups that each segment has their own needs and motivations when it comes to farmers markets.

- The primary reason shoppers visit farmers markets is “to support their local farmers” however, that desire isn’t altruistic. Shoppers want to support farmers so that they can continue to have access to local food.

- Product freshness is an important driver for both segments, but for different reasons:
  - highly engaged: fresh tastes best
  - less engaged: fresh produce lasts longer
Focus Group Topline Learnings

- Even among the highly engaged, there is low awareness among less mainstream sustainability terms such as “Regenerative Farming”, “Biodynamic Farming” and “Integrated Pest Management”

- Shoppers look to FRESHFARM as their local food advocate and primary source of information- there is trust

- When telling the FRESHFARM story, an emotional vs. rational tone appealed to them the most however, they do appreciate a balance of specifics.
Shopper Personas
Shopper Personas

**HIGHLY ENGAGED (41%)**

- **Primary Needs:**
  - Connections
  - Local food
  - Community feeling
- **Purchase Behaviors:**
  ▪ Most weekly grocery shopping done here.
  ▪ Use vendor signage to inform purchase decision (growing practices)
- **Attitudes towards Farmers Markets:**
  ▪ Shopping local aligns with their value system
  ▪ There’s comfort in familiarity with vendors - however they like to try new and different things
  ▪ Supporting farmers is critical to their community and themselves
  ▪ Growing practices is important to this group, however most trust the farmers market operator to properly screen vendors
- **Other Behaviors:**
  ▪ Group uses social media and newsletters to connect with their favorite vendors

**LESS ENGAGED (59%)**

- **Primary Needs:**
  - Fresh food
  - Good value/Fair price
  - No pressure
- **Purchase Behaviors:**
  ▪ Some weekly shopping done - mostly looking for “splurge” items they can’t find at the grocery store
  ▪ Use vendor signage to educate about price
- **Attitudes towards Farmers Markets:**
  ▪ Local food = fresh food, which lasts longer at home
  ▪ Like the market experience but rely on signage to educate them vs. conversations with vendors
  ▪ Supporting farmers is critical to their community and themselves
  ▪ Sustainable agriculture is a grey area for them and as long as the food is grown locally, they are happy.
Meet “Hazel” The highly-engaged shopper

“These are my friends”

Personal relationships with vendors is critical and keeps her coming back to the market

“I sent a gift to her when her son was born”

She follows her favorite vendors on social media and subscribes to their newsletters

“I enjoy supporting farmers and benefitting as well”

“Supporting local farmers is extremely important – where would they buy their local food from?”

“Sustainable agriculture is important, but they assume FF does the vetting for them”

“Purchasing most of her food locally is a badge of honor”

“Tell me your story and why you are farming”

“She’s very much aware of and identifies with the local food movement.”

“Signage helps her determine whether she should stop and see a new vendor”

“The market doesn’t offer everything I need” is her top reason for not purchasing more food from markets

“I assume you are vetting farmers for good practices so I don’t have to think about these things”

“I make it my business to visit my market every Sunday”

“I enjoy supporting farmers and benefitting as well”

“…it makes me feel more connected to them and I like to know what is going on with them”
Meet “Leya” The less-engaged shopper

“Get in, Get out”
She prefers little engagement with vendors as she doesn’t like to feel pressured to buy

She follows FRESHFARM on social media, but not the market vendors

She doesn’t like to wait in long lines to purchase her food

“I like to support local farmers because I know the money I spend stays in my community”

She thinks sustainable agriculture is important, but doesn’t know why, nor does she want the hassle of doing the research herself

“If it doesn’t say Certified organic, then I don’t know what I should be looking for.”

“Price is king”
Supporting local farmers is important because we need fresh produce.

Fresh produce is more economical because it lasts longer

Price is very important to her as most of her market purchases are considered “splurge” items

“I usually buy what I can’t find at the grocery store”

“I won’t even both if the prices aren’t posted”

“The Farmers Market is more expensive” is a top reason for not purchasing more food from markets

“Having vendors watch me shop is stressful”
END
DC/VA breakouts
The awareness of agricultural practices is similar among DC and VA shoppers

<table>
<thead>
<tr>
<th>Awareness of Food System Terms - DC</th>
<th>Awareness of Food System Terms - VA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Term</strong></td>
<td><strong>Understand</strong></td>
</tr>
<tr>
<td>Antibiotic Free</td>
<td>10%</td>
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<td>Grass Fed</td>
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<td>Certified Gluten Free</td>
<td>9%</td>
</tr>
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<td>USDA Certified Organic</td>
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</tr>
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<td>8%</td>
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<td>3%</td>
</tr>
<tr>
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<td>3%</td>
</tr>
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<td>3%</td>
</tr>
<tr>
<td>Beyond Organic</td>
<td>2%</td>
</tr>
<tr>
<td>Polyculture Farming</td>
<td>2%</td>
</tr>
</tbody>
</table>
DC shoppers are slightly more loyal to farmers/vendors than VA shoppers

If you shop regularly with the same farmer/producer, what is your primary reason for doing so?

- DC
  - I've tried the same product from different farmers/producers and think the one I buy... 36%
  - I trust this farmer/producer 26%
  - I've developed a relationship with this farmer/producer 17%
  - This farmer/producer has the best prices 11%
  - I don't usually shop with the same farmer/producer 11%

- VA
  - I've tried the same product from different farmers/producers and think the one I buy from... 34%
  - I trust this farmer/producer 24%
  - I don't usually shop with the same farmer/producer 19%
  - I've developed a relationship with this farmer/producer 15%
  - This farmer/producer has the best prices 10%

43% are loyal because of the relationship they have with their farmer/vendor

38% are loyal because of the relationship they have with their farmer/vendor
DC shoppers purchase significantly more of their food from markets vs. VA

45% DC shoppers purchase half to almost all food from markets

32% VA shoppers purchase half to almost all food from markets
DC & VA shoppers cite similar reasons for not purchasing more food at markets

Why don't you purchase more of your food at farmers markets? - DC

- The farmers market doesn't offer everything I need: 46%
- Food is more expensive at the farmers market: 30%
- The market hours aren't convenient for me: 16%
- The market locations aren't convenient for me: 8%
- I prefer the quality of food at my grocer: 0%

Why don't you purchase more of your groceries at farmers markets? - VA

- The farmers market doesn't offer everything I need: 48%
- Food is more expensive at the farmers market: 27%
- The market hours aren't convenient for me: 13%
- The market locations aren't convenient for me: 10%
- I prefer the quality of food at my grocer: 1%
DC & VA shoppers cite similar reasons for purchasing animal protein from vendors

Top Influencers for Purchasing Animal Protein-DC
- The taste of the product: 19%
- The animals are treated humanely: 17%
- The animals are allowed to graze in a natural way: 13%
- The animals are fed a quality diet: 10%
- I get good quality for the price: 10%
- They offer products I can’t find elsewhere: 9%
- The animals are not given any antibiotics: 6%
- The location of their farm: 5%
- Farmers treat their workers fairly: 0%

Top Influencers for Purchasing Animal Protein-VA
- The animals are treated humanely: 19%
- The taste of the product: 18%
- The animals are allowed to graze in a natural way: 13%
- The animals are not given any antibiotics: 12%
- The animals are fed a quality diet: 10%
- I get good quality for the price: 10%
- They offer products I can’t find elsewhere: 8%
- Farmers treat their workers fairly: 6%
- The location of their farm: 5%
DC Shoppers consider the term “USDA Organic” to be slightly more important than VA shoppers when it comes to making a purchase decision.
Research designed, executed and reported by Kristie Chamberlain, of Dandelion & Co. consulting

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