



FRESHFARM
nourishing our food future

Farmers Market Shopper Research

February 2022



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nourishing our food future

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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



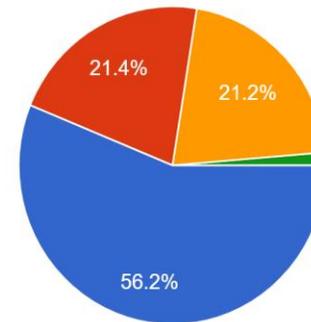
Know Farms, Know Food Survey Results

- 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

Where do you currently live?

988 responses

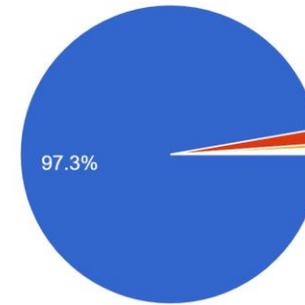


- Washington, DC
- Maryland
- Virginia
- None of the above

Nearly all participants shop at farmers markets

What best describes your PRIMARY relationship to farmers markets?

986 responses

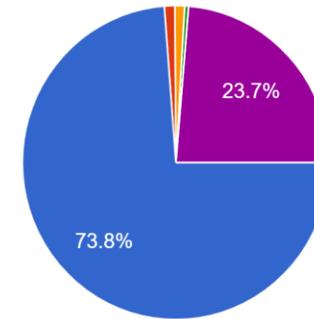


- I'm a market shopper
- I'm a market farmer/producer
- I'm a market operator
- I'm a market partner
- Office worker
- I would love to be shopper, but they are too far away!
- Visitor
- Shopper
- Customer

The survey was distributed broadly, with 24% claiming no association with FRESHFARM

Do you have a specific PRIMARY relationship to FRESHFARM farmers markets?

988 responses



- Yes, I'm a FRESHFARM shopper
- Yes, I'm a FRESHFARM farmer/producer
- Yes, I'm a FRESHFARM employee
- Yes, I'm a FRESHFARM partner
- No relationship (select this option if you are a shopper, vendor, or employee at markets not operated by FRESHFARM)



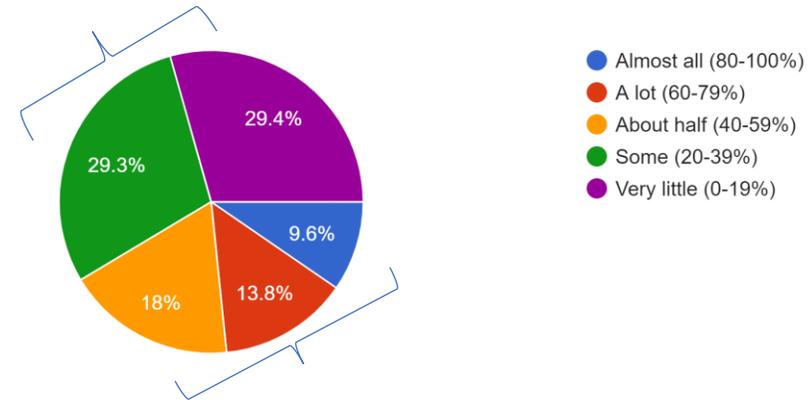
Shopping Habits

There is a large segment of shoppers (41%) purchasing most if not all of their monthly food purchases from markets

When thinking about the food you purchase in an entire month, what percentage of that is from a farmers market?

988 responses

Some to very little: 59%

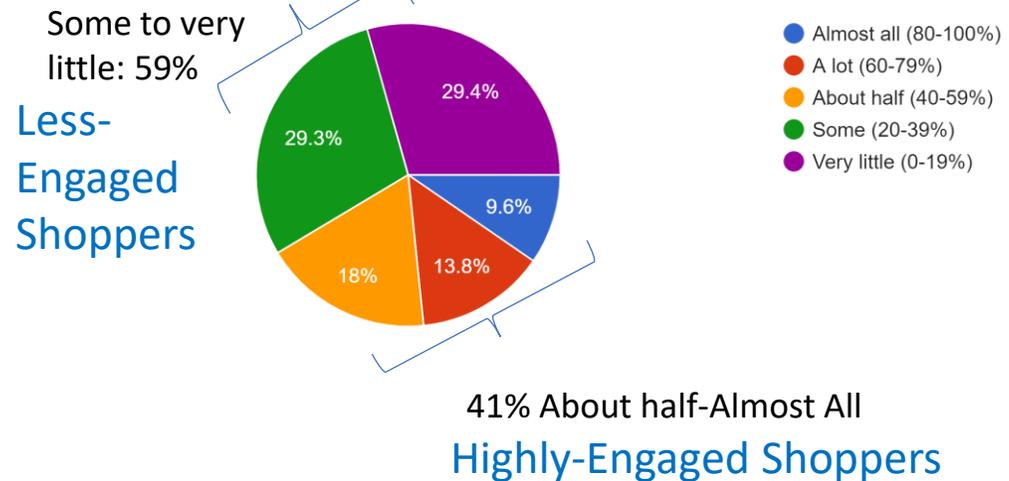


41% About half-Almost All

Two shopper segments emerged from the data: the highly- engaged and the less-engaged shopper

When thinking about the food you purchase in an entire month, what percentage of that is from a farmers market?

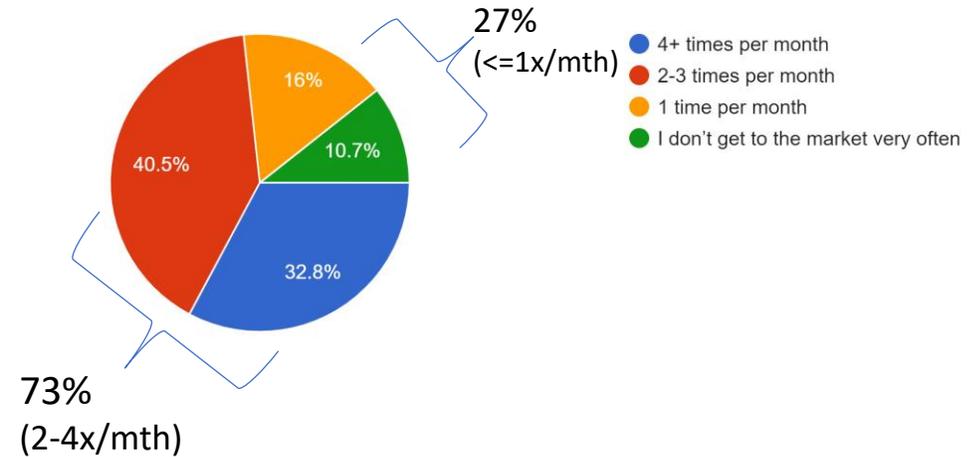
988 responses



73% of shoppers attend markets on a regular basis

How many times in a month do you typically shop at a farmers market?

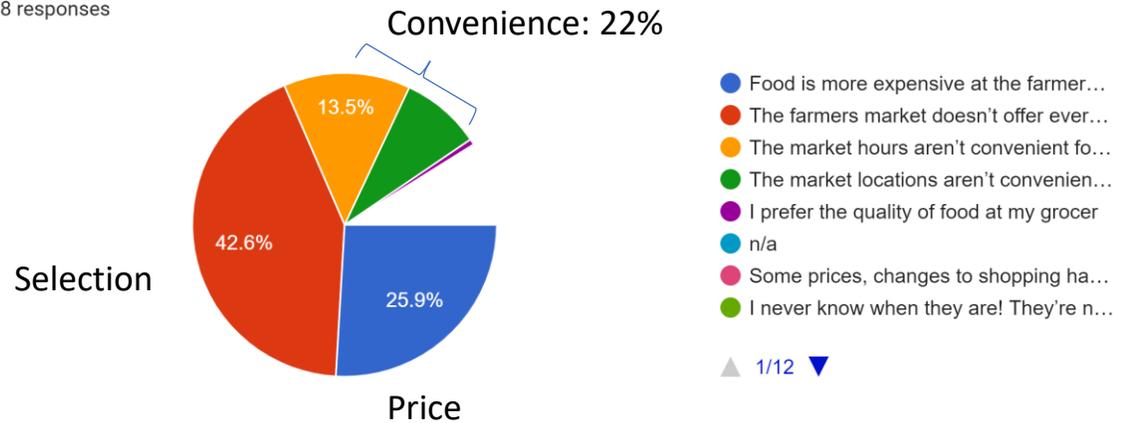
973 responses



There are 3 primary barriers to growth: Selection, Convenience & Price

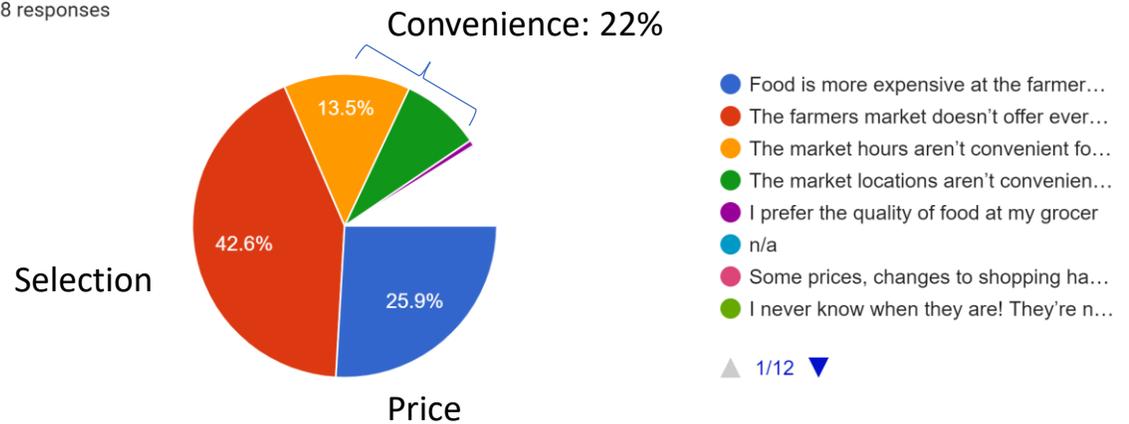
What is the primary reason you don't purchase more of your weekly groceries at a farmers market?

988 responses



Among the highly-engaged shopper, selection was the #1 reason they didn't shop more often

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



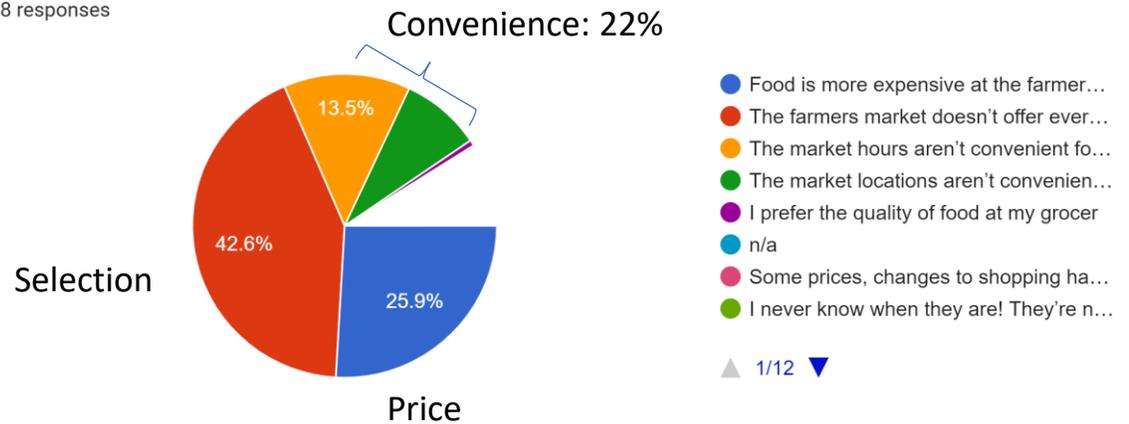
Highly-engaged Shopper:

- Selection: 59%
- Convenience: 18%
- Price: 16%

Among the less-engaged shoppers, price plays a larger role than the highly engaged shopper for why they don't shop more often

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

988 responses



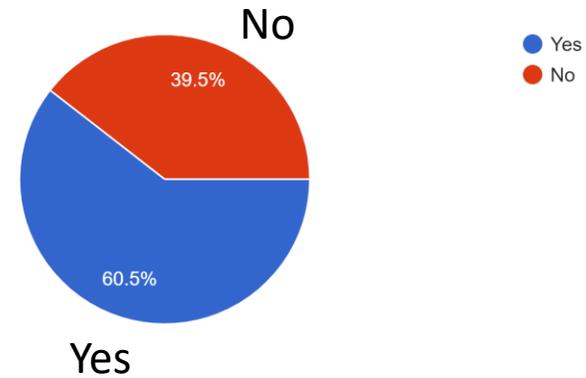
Less-engaged Shopper:

- Selection: 39%
- Convenience: 20%
- Price: 28%

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





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

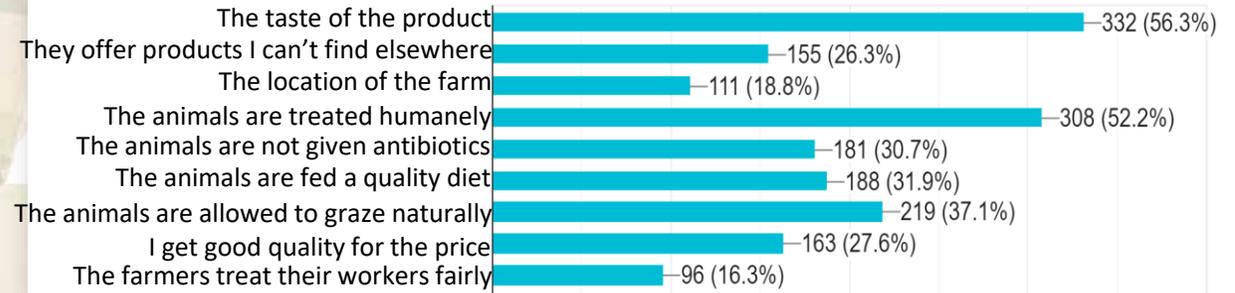
“Please rate each statement below as it relates to your decision for making a purchase at a farmers market.”

| | |
|--|------------|
| 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

When thinking about the vendor/farmer that you purchase animal protein from, what are the three (3) MOST IMPORTANT things that influence your purchase decision?

590 responses

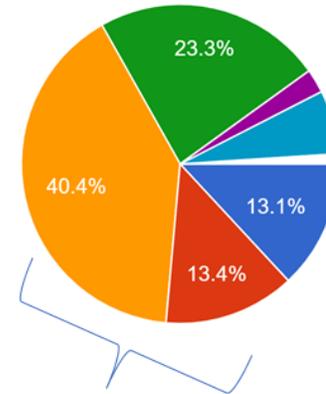


The background of the slide features a stylized illustration of fresh produce. In the foreground, there are several large, light-colored carrots with long, tapered roots. Behind them, there are green leafy vegetables, possibly spinach or kale, with detailed leaf patterns. The overall style is clean and modern, with a soft, muted color palette.

Food system views, pre/post pandemic

The pandemic has changed 53% of shopper opinions about the national food system

This next question is about our national food system, which refers to the conventional ways our food is grown, processed, transported, and ends u... changed your views of our national food system?
988 responses



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

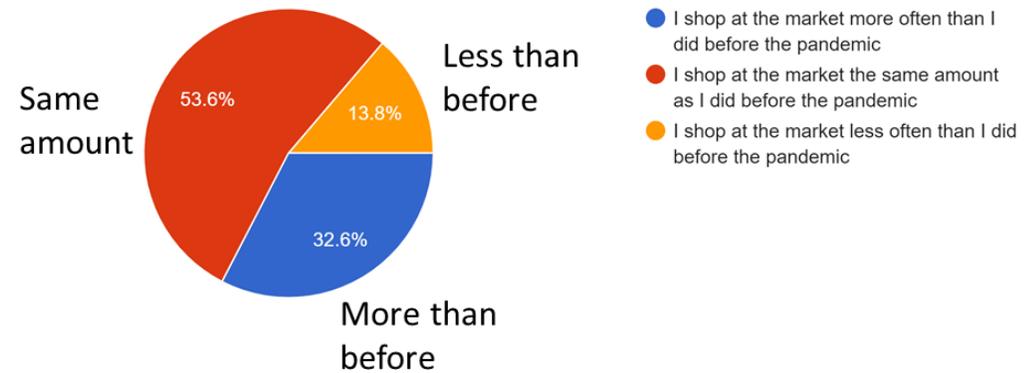
- Our national food system is safe and r...
- Our national food system is NOT safe...
- Local food is more important now than...
- The pandemic hasn't changed my vie...
- The pandemic hasn't changed my vie...
- I don't have an opinion on this
- 2 and 3, this question needs multiple...
- supply chain less impacted if local

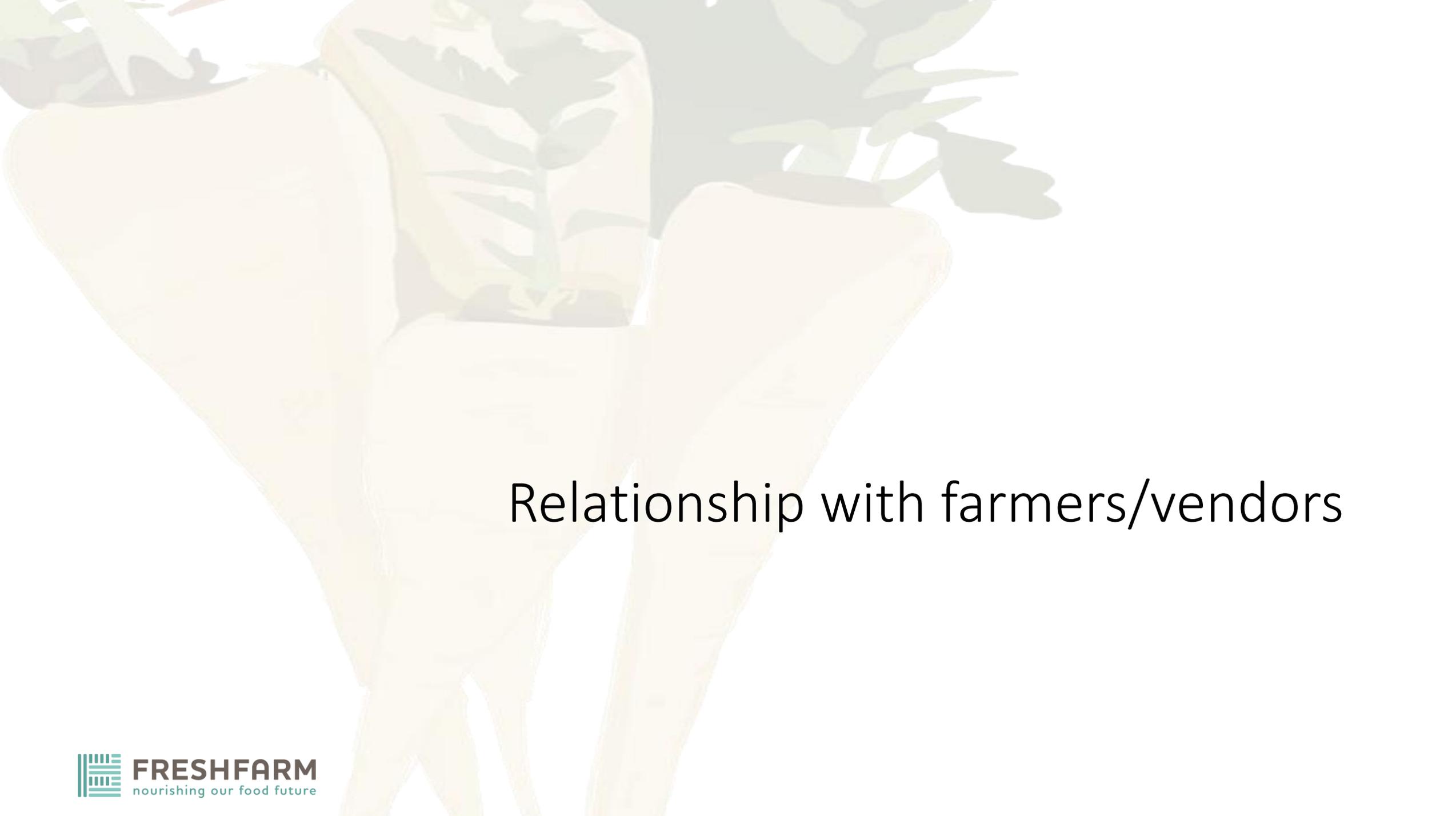
▲ 1/2 ▼

Yet most visit the market the same amount as before the pandemic

Thinking about how often you shop at a farmers market before the pandemic compared to now, are you shopping more or less than before?

988 responses



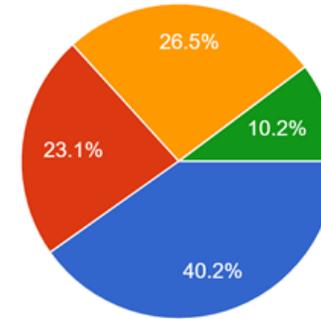
The background of the slide features a stylized illustration of fresh produce. In the foreground, there are several large, light-colored carrots with green leafy tops. Behind them, there are other vegetables, including what appears to be a head of cauliflower or a similar vegetable, and more leafy greens. The illustration is rendered in a soft, painterly style with a muted color palette of greens, yellows, and browns, set against a plain white background.

Relationship with farmers/vendors

Market shoppers are loyal, with 40% shopping from the same vendor every visit

Thinking about the products you currently purchase at the farmers market, tell us about the farmers/producers you shop with:

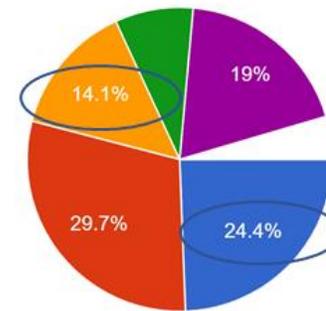
988 responses



- I try to purchase from the same farmers/producers every time
- I try to shop from different farmers/producers every time
- It doesn't matter which farmers/producers I purchase from as long as it is the same product
- I purchase from the same farmers/producers because they are the only one offering this particular product

39% of people shop with the same vendor every visit because of the relationship they have established

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



- I trust this farmer/producer
- I've tried the same product from differ...
- I've developed a relationship with this...
- This farmer/producer has the best prices
- I don't usually shop with the same far...
- Support farmers of color
- Assigned
- Patronize them all

▲ 1/7 ▼

- 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?

| | |
|--|-----|
| I like the produces they offer | 46% |
| They grow or make their own products | 46% |
| Their prices are fair | 44% |
| Their farm/business is local | 44% |
| They don't use chemicals in growing their food | 39% |
| They grow their food using specific farming practices | 29% |
| They don't use GMOs | 19% |
| They treat their workers fairly | 11% |
| They are a business owned by someone from an under represented community | 11% |
| They are a well established business | 6% |
| They treat their workers fairly | .1% |

The background of the slide features a stylized illustration of fresh produce. In the foreground, there are several large, light-colored carrots with green leafy tops. Behind them, there are other green leafy vegetables, possibly spinach or kale, rendered in a similar soft, illustrative style. The overall color palette is light and natural, with various shades of green and beige.

Awareness/attitudes of
agricultural practices

There is higher awareness and comprehension among shoppers for more mainstream agricultural terms.

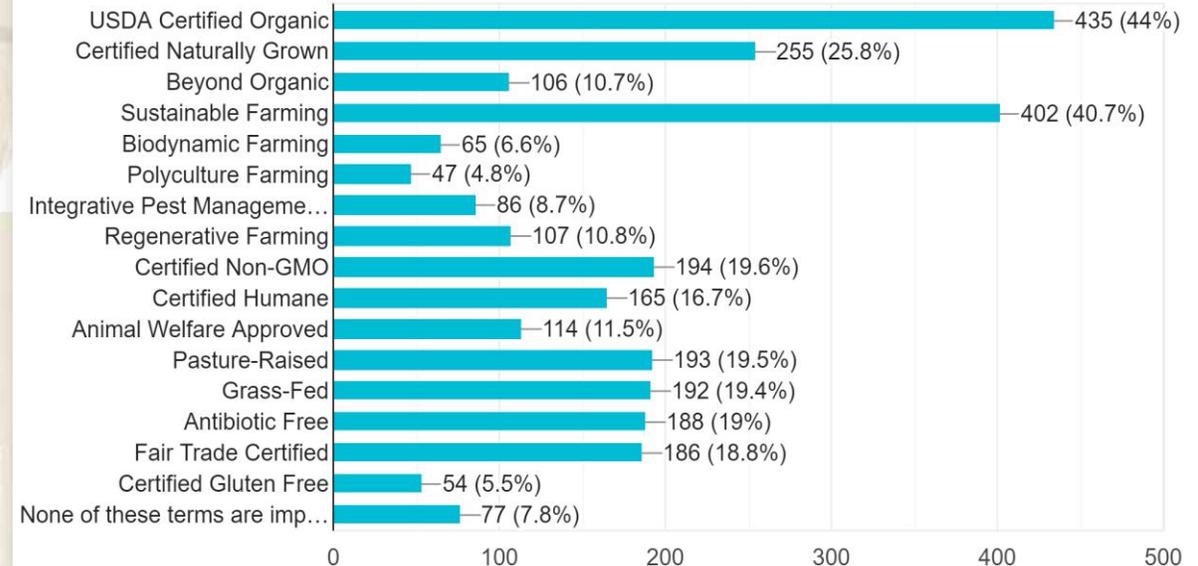
Below is a list of various terms used when talking about how food products are grown, raised, processed, or labeled. How well do you know each term on a scale of 1-3?

| | | Understand | Familiar, don't fully understand | Don't know term |
|----------------|--------------------------------|------------|----------------------------------|-----------------|
| | | 3 | 2 | 1 |
| Most familiar | 1 Antibiotic-Free | 63% | 32% | 5% |
| | 2 Grass-Fed | 63% | 33% | 4% |
| | 3 Certified Gluten Free | 61% | 34% | 5% |
| | 4 USDA Certified Organic | 58% | 39% | 4% |
| | 5 Pasture Raised | 54% | 38% | 7% |
| | 6 Certified Non-GMO | 53% | 40% | 6% |
| | 7 Sustainable Farming | 52% | 42% | 6% |
| | 8 Fair Trade Certified | 50% | 42% | 8% |
| | 9 Certified Humane | 39% | 47% | 14% |
| | 10 Certified Naturally Grown | 34% | 48% | 19% |
| | 11 Animal Welfare Approved | 30% | 45% | 25% |
| Least familiar | 12 Regenerative Farming | 22% | 37% | 41% |
| | 13 Integrative Pest Management | 21% | 35% | 44% |
| | 14 Biodynamic Farming | 16% | 39% | 45% |
| | 15 Beyond Organic | 16% | 35% | 49% |
| | 16 Polyculture Farming | 15% | 29% | 56% |

While Sustainable Farming rises in importance to shoppers, there is low awareness and consideration of practices that fall under the sustainability umbrella

Using the same list of terms as above, think about whether any of these terms would influence your purchase decision. Please select the 3 terms that are MOST IMPORTANT to you.

988 responses





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

“...it makes me feel more connected to them and I like to know what is going on with them”

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

“I enjoy supporting farmers and benefitting as well”

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



“You are how you food shop”

Purchasing most of her food locally is a badge of honor

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

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

“Tell me your story and why you are farming”

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

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

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

“Having vendors watch me shop is stressful”

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



END



DC/VA breakouts

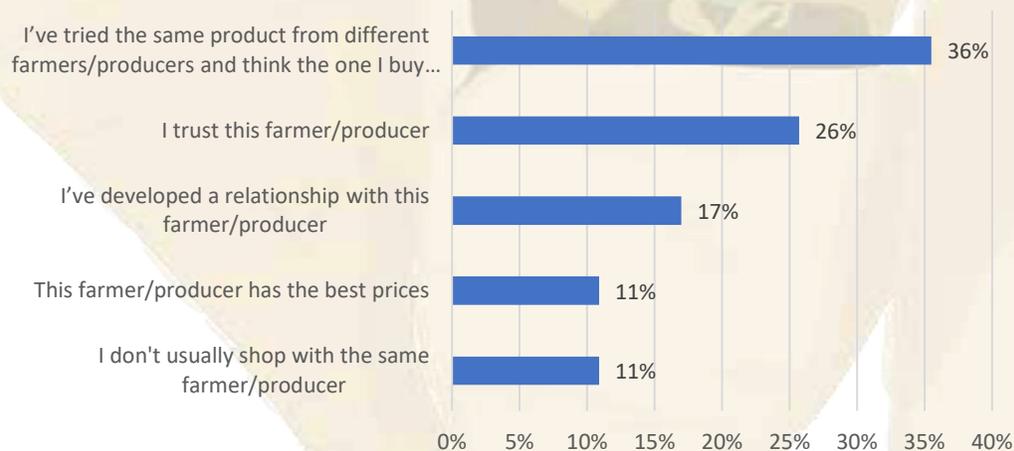
The awareness of agricultural practices is similar among DC and VA shoppers

| Awareness of Food System Terms - DC | | | |
|-------------------------------------|------------|----------------------------------|-----------------|
| Term | Understand | Familiar, Don't Fully Understand | Don't Know Term |
| Antibiotic Free | 10% | 5% | 2% |
| Grass Fed | 9% | 6% | 2% |
| Certified Gluten Free | 9% | 6% | 1% |
| USDA Certified Organic | 9% | 6% | 1% |
| Certified Non GMO | 8% | 7% | 2% |
| Pasture Raised | 8% | 6% | 3% |
| Sustainable Farming | 8% | 7% | 2% |
| Fair Trade Certified | 8% | 7% | 2% |
| Certified Humane | 6% | 8% | 4% |
| Certified Naturally Grown | 5% | 8% | 6% |
| Animal Welfare Approved | 5% | 7% | 8% |
| Regenerative Farming | 3% | 6% | 11% |
| Integrative Pest Mgmt | 3% | 6% | 13% |
| Biodynamic Farming | 3% | 6% | 13% |
| Beyond Organic | 2% | 5% | 15% |
| Polyculture Farming | 2% | 5% | 16% |

| Awareness of Food System Terms - VA | | | |
|-------------------------------------|------------|----------------------------------|-----------------|
| Term | Understand | Familiar, Don't Fully Understand | Don't Know Term |
| Grass Fed | 10% | 5% | 1% |
| Antibiotic Free | 10% | 5% | 1% |
| Certified Gluten Free | 10% | 5% | 1% |
| Pasture Raised | 9% | 6% | 2% |
| USDA Certified Organic | 9% | 6% | 1% |
| Certified Non GMO | 9% | 6% | 2% |
| Fair Trade Certified | 8% | 7% | 2% |
| Sustainable Farming | 8% | 8% | 1% |
| Certified Humane | 6% | 7% | 4% |
| Certified Naturally Grown | 5% | 8% | 5% |
| Animal Welfare Approved | 5% | 7% | 8% |
| Regenerative Farming | 3% | 6% | 12% |
| Integrative Pest Mgmt | 3% | 6% | 13% |
| Beyond Organic | 2% | 6% | 15% |
| Biodynamic Farming | 2% | 7% | 14% |
| Polyculture Farming | 2% | 5% | 18% |

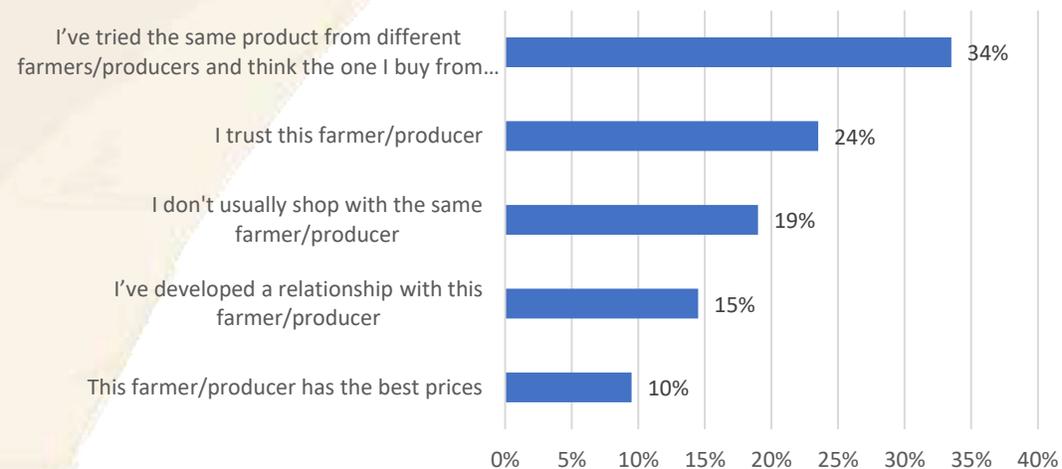
DC shoppers are slightly more loyal to farmers/vendors than VA shoppers

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



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

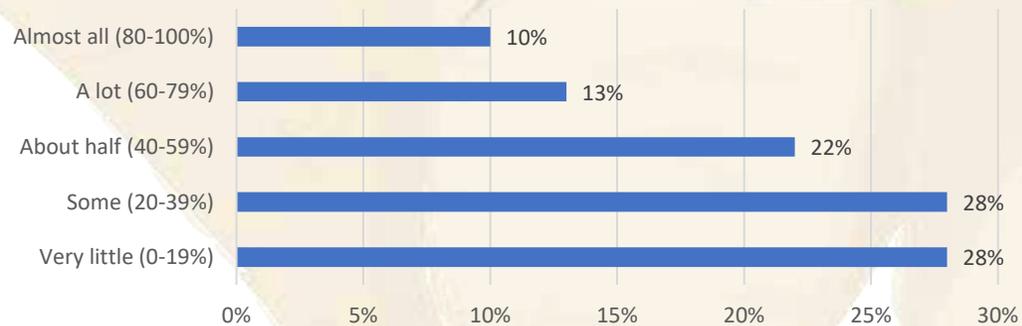
If you shop regularly with the same farmer/producer, what is your primary reason for doing so?-VA



38% are loyal because of the relationship they have with their farmer/vendor

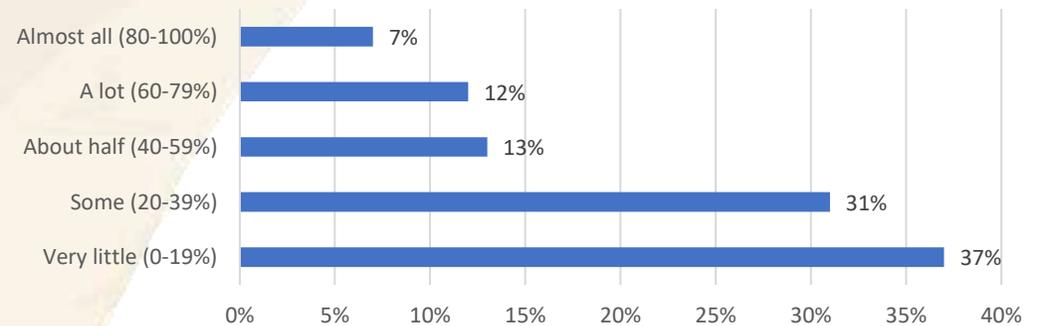
DC shoppers purchase significantly more of their food from markets vs. Va

What % of your monthly food purchase is from a farmers markets?- DC



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

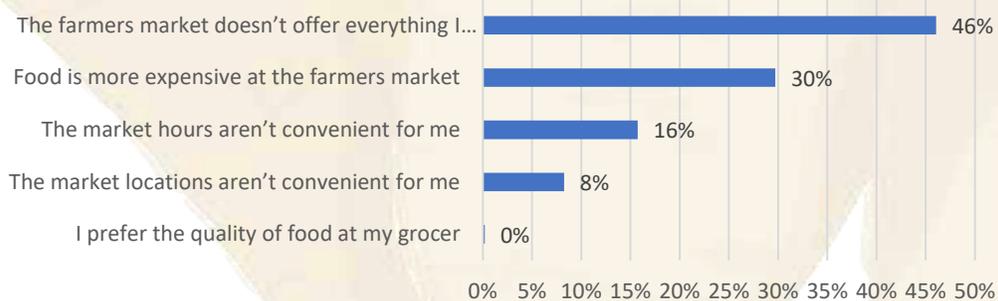
What % of your monthly food purchase is from a farmers market? - VA



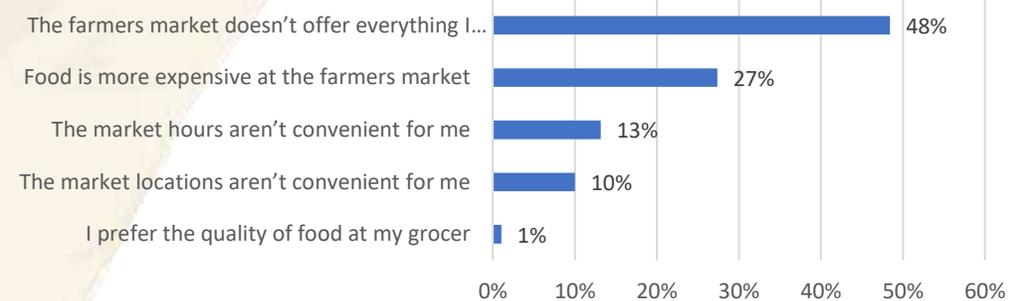
32% VA shoppers purchase half to almost all food from markets

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



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

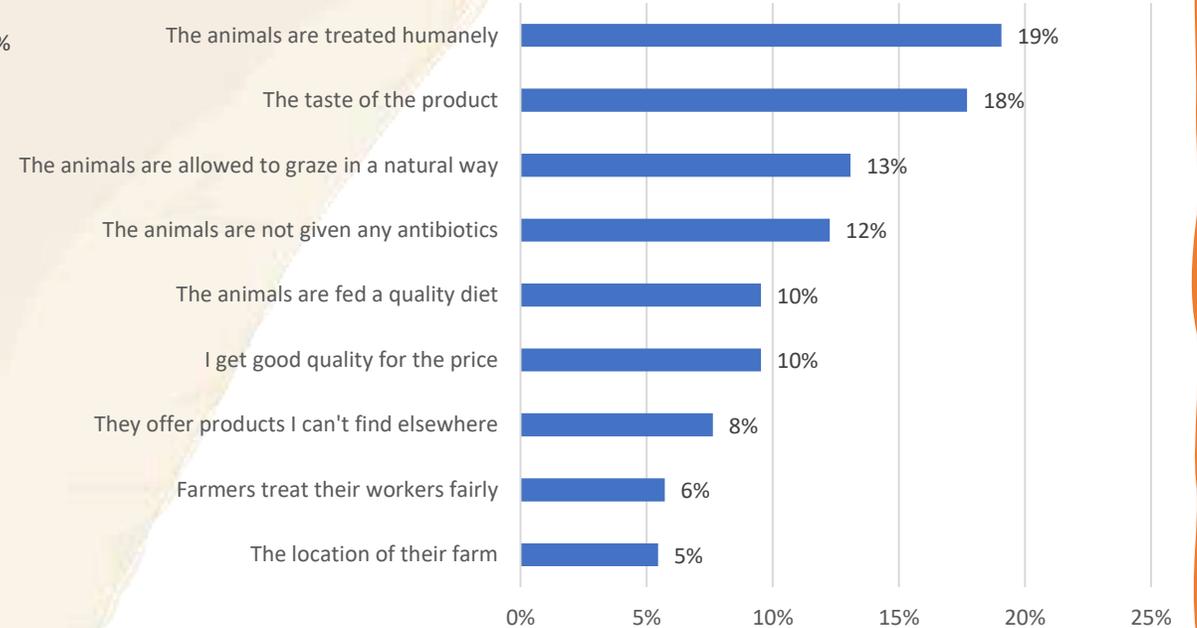


DC & VA shoppers cite similar reasons for purchasing animal protein from vendors

Top Influencers for Purchasing Animal Protein-DC

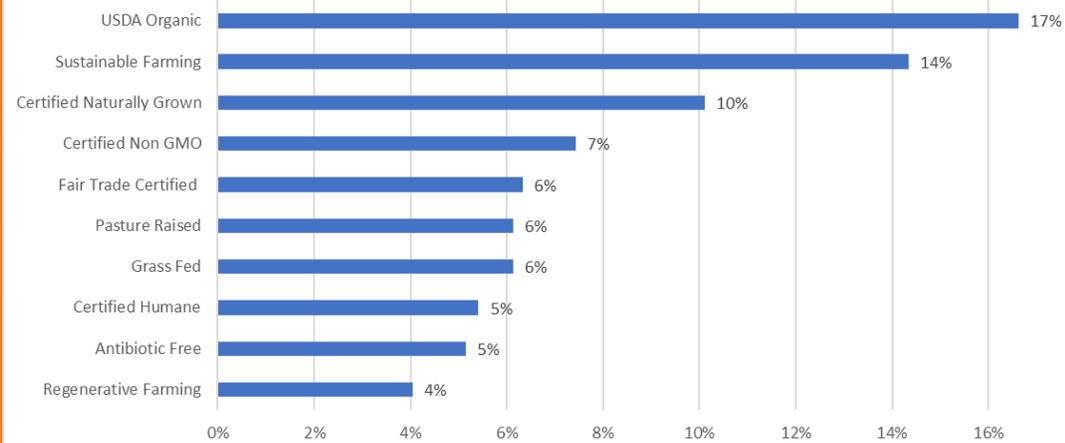


Top Influencers for Purchasing Animal Protein-VA

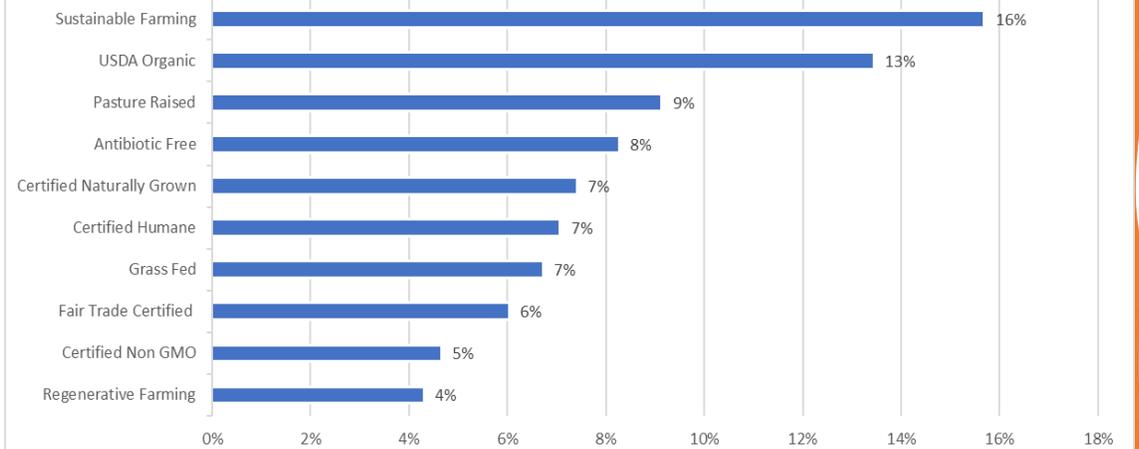


DC Shoppers consider the term “USDA Organic” to be slightly more important than VA shoppers when it comes to making a purchase decision

TOP 10 Terms Impacting Purchase Decision- DC



TOP 10 Terms Impacting Purchase Decision- VIRGINIA



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