LOCALLY GROWN FOODS
STRATEGIC POSITIONING RESEARCH

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Prepared for:

The Appalachian Sustainable Agricultural Project

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TABLE OF CONTENTS

INTRODUCTION 1

METHODOLOGY 2

HIGHLIGHTS 4

USAGE PATTERNS

Frequency of Shopping for Food 10
Monthly Food Expenditures 12
Percentage of Food Expenditure Spent on Locally Grown Foods 14
Food Shopper Profile 16
Frequency of Shopping at Various Venues 18
Reasons for Not Shopping at Farmers' Markets More Often 20
Reasons for Not Shopping at Road Side Stands More Often 22
Reasons for Not Shopping at Food Cooperatives More Often 24
Reasons for Not Shopping at Local Food Clubs More Often 26
Venue Profile 28

IMAGE

Priorities 31
Satisfaction with Venues 34

LOCALLY GROWN FOOD PERCEPTIONS

Statements on Believability 36
Likelihood of Purchase 41
Locally Produced Food vs. Food Produced Outside Local Area 46
Top Reason for Buying Locally Produced Food 50
Total Reasons for Buying Locally Produced Food 51
Top Reason for Not Buying Locally Produced Food 55
Total Reasons for Not Buying Locally Produced Food 56
Potential Spokespeople 60

RESPONDENT PROFILE 65

APPENDIX

INTRODUCTION

The Appalachian Sustainable Agriculture Project (ASAP) is preparing to embark on a campaign to encourage North Carolinians to buy locally grown food. As part of this effort, the group would like to …

- Identify Western North Carolinians usage patterns when shopping for food, which includes meat, fruit, vegetables, dairy products, and poultry.

- Define priorities when purchasing these food items.

- Measure perceptions of places that sell locally home grown foods.

- Determine the likelihood of shopping at the various venues.

This document presents the findings from the quantitative research study designed to meet ASAP's objectives.

METHODOLOGY

WHO	Consumers responsible for doing most of the grocery shopping for their household. Respondents were at least 18 years of age.
WHAT	Telephone interviews. Each interview required from 10 to 12 minutes of a respondent's time.
WHEN	Respondents were interviewed during April and May 2000.
WHERE	Buncombe, Madison and Henderson Counties, North Carolina.
WEIGHTING	Findings were weighted according to the population in each county. - Buncombe (66%) - Henderson (38%) - Madison (6%)
HOW	Research Inc. was responsible for research design, fieldwork, report preparation and presentation. Research Inc. designed a sample questionnaire based upon a very brief conversation with Philip Pritchard. Representatives of ASAP had the opportunity to approve the draft and the anticipated research methodology, suggesting any alterations they felt would enhance the quality of the research Once the draft was approved, the questionnaire was tested among actual respondents to ensure that wording and question sequence were appropriate and clearly understandable. After pre-testing was completed and the questionnaire had been revised, Research Inc. submitted the tested version of the questionnaire for final approval. All interviews were conducted from Research Inc.'s central research facility in Greenville, South Carolina. Interviewers were trained to ensure that they understood project specifics. Findings were analyzed by senior analysts at Research Inc.

HIGHLIGHTS

HIGHLIGHTS

FOOD SHOPPING PATTERNS

- Most (85%) Asheville area residents shop for food (meat, poultry, fruits, vegetables and dairy products) at least once a week.

- The average Asheville resident spends $167.62 on food each month.

- As expected, locally produced food currently represents a small portion of consumers' food budget.

  - Half (49%) of all Asheville area residents spend 5% or less of their monthly food budget on locally grown food.
  - 30% spend 6% to 10%.
  - 9% spend 11% to 19%.
  - Only one in ten (11%) consumers spend more than 20% of their monthly budget on locally grown food.

- In general …

  - The older the consumer the lower the portion of the food budget is spent on locally grown food.

  - The less affluent the consumer the lower the portion of the food budget is spent on locally grown food.

- Those consumers who spend more than 11% of their monthly food budget on locally grown food …

  - Are more likely to be age 18 to 34 than consumers who spend less than 11% of their budget on locally grown food.

  - Are more likely to have children living in the home (39% vs. 20% for the average consumer).

  - Tend to have household incomes between $15,000 and $34,999 (68%). They are also more likely than other consumers to have a household income of $50,000 or more.

HIGHLIGHTS
(CONTINUED)

- As might be expected, almost all (97%) Asheville area consumers shop frequently or sometimes at grocery stores. Less than half frequently patronize places that traditionally sell locally produced food.

  - 97% shop frequently or sometimes at grocery stores.
  - 47% shop typically shop at Superstores such as Sam's.
  - 44% shop regularly at farmers markets.
  - 41% shop at road side stands.
  - 7% participate in food clubs.
  - 6% use food cooperatives.

- As expected, the most common reason for not shopping at venues that typically sell locally grown food is inconvenience. When asked why they do not shop more often at several venues that sell locally grown food …

  - Farmers markets – 61% blamed inconvenience or inconvenient locations. 3% said they do not know where one is.
  - Road side stands – 48% stated inconvenience. 12% said they do not know where they are.
  - Food cooperatives – 38% declared inconvenience. 32% claim they do not know where they are or unfamiliar with them.
  - Local food clubs – 33% said inconvenience. 29% are not familiar with them.

FOOD PRIORITIES

- Freshness is, by far, consumers' #1 priority when shopping for food items such as meat, poultry, fruits, and vegetables – surpassing convenient location and price in importance. When asked to use a "1" to "7" scale to rate the importance of five attributes when shopping for food …

  - Almost all (97%) Asheville area residents rated freshness a top priority (a "6" or "7" rating).
  - Nine in ten (89%) consumers rated appearance tops.
  - 87% rated nutritional value very important.
  - 83% gave convenient location a "6" or "7" rating.
  - 80% rated price a top priority.

HIGHLIGHTS
(CONTINUED)

- Notably, consumers' priorities when shopping for food do not vary significantly by age or income.

- However, superstore shoppers appear more motivated by price than other consumers. Those who spend more than 11% of their budget on locally produced food are less concerned about the appearance of the food than other consumers.

PERCEPTIONS ABOUT LOCALLY GROWN FOOD

- Overall, consumers living in Buncombe, Henderson and Madison counties appear to have a positive attitude towards locally grown or produced food. When asked how strongly they believe eight statements about locally grown food, the majority of consumers indicated that the statements are *very* or *somewhat* believable.

    - Contributes to the local economy (96% stated very or somewhat believable).
    - Supports neighbors (87%).
    - Tastes better (86%).
    - Safer and healthier (83%).
    - Preserves rural character (79%).
    - Makes statement about providing a better future for children (71%).
    - Improves health and personal well-being (71%).
    - Saves environment (67%).

- Less than one in ten consumers stated that any of the eight statements about locally grown food was not believable at all. At least two in ten consumers are skeptical about …

    - Locally grown food saves the environment (30% indicated the statement was not very believable or not at all believable).
    - Locally grown food improves health and personal well-being (28%).
    - Buying Locally grown food makes a statement about providing a better future for children (26%).
    - Locally grown food helps preserve the rural character of your region (20%).

HIGHLIGHTS
(CONTINUED)

- Indeed, the #1 reason for buying locally produced food is freshness. When asked what would be the <u>one</u> most important reason they would buy locally produced food, 58% of all consumers stated freshness.

- The #1 obstacle to increasing sales of locally produced food is inconvenience or unfamiliarity with locations that sell locally produced food. Price ranks second followed by lack of selection.

THE OPPORTUNITY

- ASAP has the greatest opportunity to influence consumers' purchase of locally produced food by promoting freshness.

- Clearly, ASAP's top priority should be to acquire entry into local supermarkets.
  - Almost all (97%) Asheville area citizens frequently patronize supermarkets.
  - Convenience is the #1 obstacle to selling locally produced food.
  - Indeed, nine in ten (88%) consumers claim they would be more likely to buy locally produced food if it were more convenient to obtain.

- Once ASAP has commitments from local supermarkets to sell locally produced food, the organization should focus on increasing awareness of the venues that sell locally produced food. Possibly, some co-op advertising could be obtained.

- A campaign featuring a successful local farmer as the messenger or spokesperson for locally produced food will be more successful than other spokespersons when communicating the benefits of buying locally grown food.

HIGHLIGHTS
(CONTINUED)

- The Asheville Citizen Times may serve as an effective medium for communicating the benefits of locally produced food. Almost all (94%) Buncombe County residents and most (84%) Madison County residents claim they read the Times on a regular basis. In Henderson County, the Henderson Times News has far better penetration (76%). Other popular media include …

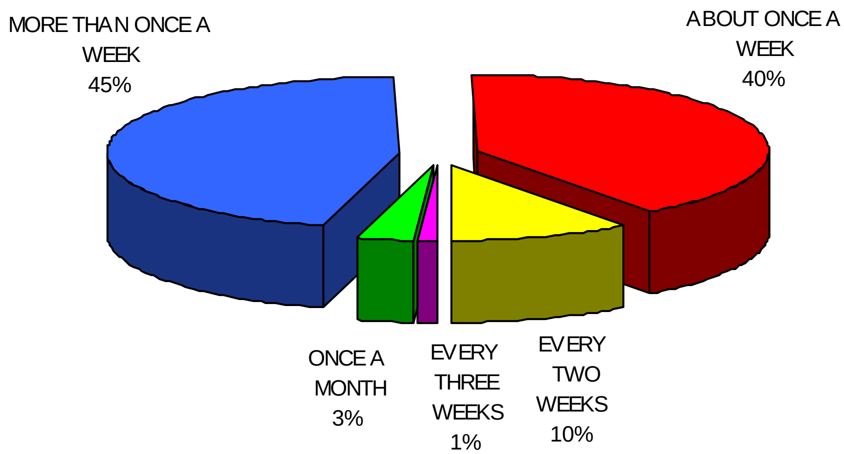
    - Channel 13 WLOS – ABC (82% declare their favorite station).
    - WWNC 570 AM (31%)

- Although not measured billboards are a cost-effective way to reach a lot of people.

USAGE PATTERNS

FREQUENCY OF SHOPPING FOR FOOD[1]

Most (85%) Asheville area consumers shop for food at least once a week.



A comparison of shopping frequency by venues patronized reveals that food club shoppers are less likely to shop more than once a week than patrons of other food venues.

	VENUE						
	TOTAL STUDY (400) %	GROCERY STORE (286) %	SUPER./ SAMS (141) %	FARMER MARKET (126) %	ROAD SIDE STAND (126) %	FOOD COOP. (16)* %	FOOD CLUB (19)* %
MORE THAN ONCE A WEEK	45	44	51	49	41	50	33
ABOUT ONCE A WEEK	40	42	38	35	44	49	44
EVERY TWO WEEKS	10	9	7	11	12	1	14
EVERY THREE WEEKS	1	1	-	1	2	-	-
ONCE A MONTH	3	3	5	3	1	-	9

Yellow shading indicates a significant difference from total study at the 95% confidence interval.
CAUTION: Small base.

1 *"About how often do you shop for food? Do you shop …"*

FREQUENCY OF SHOPPING FOR FOOD[2]

(CONTINUED)

Asheville consumers aged 55 to 64 appear to shop for food more often than other consumers.

		AGE				
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
MORE THAN ONCE A WEEK	45	37	43	35	59	42
ABOUT ONCE A WEEK	40	38	45	47	33	44
EVERY TWO WEEKS	10	17	12	9	5	10
EVERY THREE WEEKS	1	5	-	4	0	-
ONCE A MONTH	3	2	-	6	4	4

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

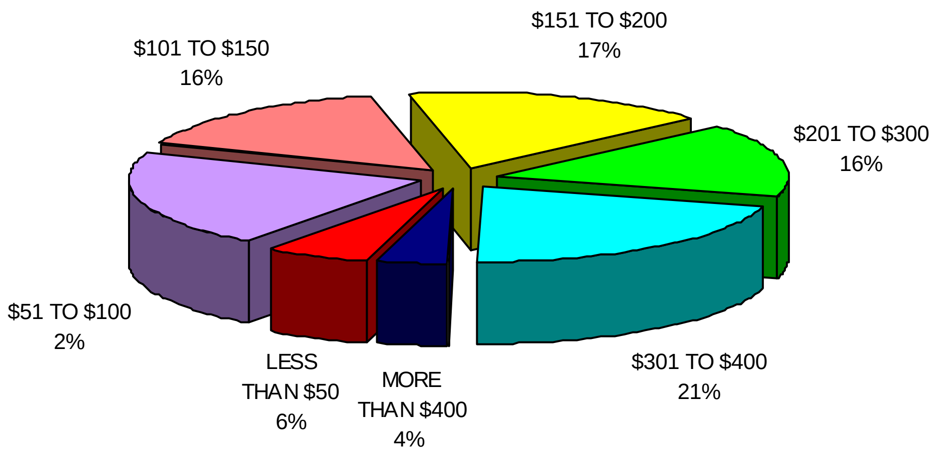
In general, the less affluent the consumer the less likely he or she shops for food more than once a week.

		INCOME			
	TOTAL STUDY (300) %	UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
MORE THAN ONCE A WEEK	45	34	50	45	59
ABOUT ONCE A WEEK	40	46	40	34	37
EVERY TWO WEEKS	10	10	6	16	1
EVERY THREE WEEKS	1	3	4	-	-
ONCE A MONTH	3	7	-	5	3

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

2 *"About how often do you shop for food? Do you shop …"*

MONTHLY FOOD EXPENDITURES[3]



	COUNTY			
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
LESS THAN $50	6	6	6	4
$51 TO $100	21	19	18	26
$101 TO $150	16	18	11	11
$151 TO $200	17	17	21	16
$201 TO $300	16	15	20	18
$301 TO $400	21	23	19	18
MORE THAN $400	4	3	5	7
ESTIMATED MEAN EXPENDITURE	$167.62	$123.18	$201.56	$195.33

	FOOD EXPENDITURES						
	TOTAL STUDY (300) %	GROCERY STORE (286) %	SUPER./ SAMS (141) %	FARMER MARKET (126) %	ROAD SIDE STAND (126) %	FOOD COOP. (16)* %	FOOD CLUB (19)* %
LESS THAN $50	6	6	5	6	8	-	-
$51 TO $100	21	21	18	24	21	10	19
$101 TO $150	16	16	18	19	17	-	1
$151 TO $200	17	16	17	15	14	27	35
$201 TO $300	16	16	11	13	15	27	14
$301 TO $400	21	21	26	20	23	36	32
MORE THAN $400	4	21	26	20	23	36	32

Yellow shading indicates a significant difference from total study at the 95% confidence interval.
CAUTION: Small base.

3 *"Generally, how much do you spend on food each month?"*

MONTHLY FOOD EXPENDITURES[4]

(CONTINUED)

In general, the older the consumer the less he or she spends on food items.

		AGE				
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
LESS THAN $50	6	7	-	3	0	13
$51 TO $100	21	9	11	16	20	30
$101 TO $150	16	7	16	8	12	24
$151 TO $200	17	36	17	9	20	10
$201 TO $300	16	14	8	23	24	12
$301 TO $400	21	24	35	30	24	10
MORE THAN $400	4	3	12	12	1	-

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

40% of all consumers with household incomes of $50,000 or more claim they spend $301 to $400 on food items each month.

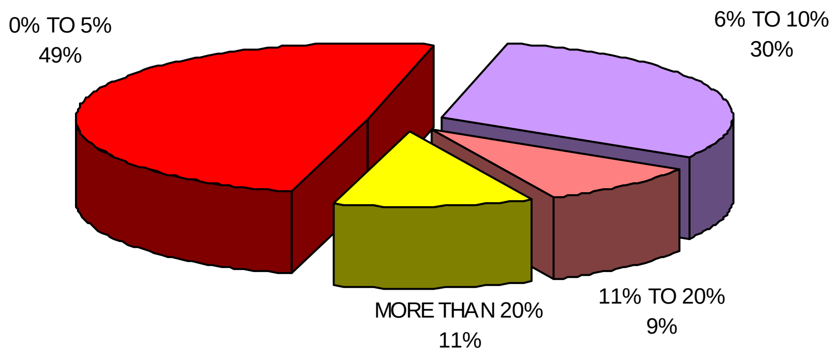
		INCOME			
	TOTAL STUDY (300) %	UNDER $25,000 (75) %	$25,000- $34,999 (52) %	$35,000- $49,999 (42) %	$50,000 & MORE (32) %
LESS THAN $50	6	11	4	-	3
$51 TO $100	21	28	17	21	6
$101 TO $150	16	18	22	10	7
$151 TO $200	17	14	21	17	16
$201 TO $300	16	8	21	12	22
$301 TO $400	21	20	11	32	40
MORE THAN $400	4	-	5	7	7

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

4 *"Generally, how much do you spend on food each month?"*

PERCENTAGE OF FOOD EXPENDITURE SPENT ON LOCALLY GROWN FOODS[5]

As might be expected, half (49%) of all Asheville consumers spend 5% or less of their food expenditure on locally grown foods. 79% spend 10% or less.



Among the three counties measured, Madison County residents appear to spend the least on locally grown foods.

		COUNTY		
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
0% TO 5%	49	45	64	55
6% TO 10%	30	32	21	29
11% TO 20%	9	11	10	6
MORE THAN 20%	11	12	5	10

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

Food club users are more likely than other consumers to spend more than 20% or more on locally grown food.

		PERCENTAGE GROWN LOCALLY					
	TOTAL STUDY (400) %	GROCERY STORE (286) %	SUPER./ SAMS (141) %	FARMER MARKET (126) %	ROAD SIDE STAND (126) %	FOOD COOP. (16)* %	FOOD CLUB (19)* %
0% TO 5%	49	50	53	39	45	17	25
6% TO 10%	30	30	30	40	30	54	53
11 TO 20%	9	9	8	7	10	15	-
MORE THAN 20%	11	10	9	15	16	14	22

Yellow shading indicates a significant difference from total study at the 95% confidence interval.
CAUTION: Small base.

5 *"About what per cent of your monthly food bill is spent on locally grown foods?"*

PERCENTAGE OF FOOD EXPENDITURE SPENT ON LOCALLY GROWN FOODS[6]

(CONTINUED)

Consumers aged 45 to 54 and those aged 65 and older spend a smaller percentage on locally grown food than otherer consumers.

	AGE					
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
0% TO 5%	49	36	39	65	46	59
6% TO 10%	30	33	32	25	34	27
11% TO 20%	9	17	16	8	4	1
MORE THAN 20%	11	13	13	2	16	13

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

Most (68%) consumers with household incomes under $25,000 allocate 5% or less of their total food budget to locally grown food.

	INCOME				
	TOTAL STUDY (300) %	UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
0% TO 5%	49	68	37	54	50
6% TO 10%	30	16	39	39	30
11% TO 20%	9	7	13	1	17
MORE THAN 20%	11	8	11	6	3

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

6 *"About what per cent of your monthly food bill is spent on locally grown foods?"*

FOOD SHOPPER PROFILE

The following two pages present a profile of Asheville area residents by the percentage of their monthly food bill they spend on locally produced food.

PERCENTAGE OF MONTHLY FOOD BILL SPENT ON LOCALLY PRODUCED FOOD				
	TOTAL STUDY (300) %	0% TO 5% (104) %	6% TO 10% (64) %	11%+ (43) %
FREQUENCY OF SHOPPING FOR FOOD				
MORE THAN ONCE A WEEK	45	51	40	52
ABOUT ONCE A WEEK	40	36	41	36
EVERY TWO WEEKS	10	8	11	7
EVERY THREE WEEKS	1	-	3	5
ONCE A MONTH	3	5	4	-
FOOD EXPENDITURES				
LESS THAN $50	6	6	1	7
$51 TO $100	21	21	18	15
$101 TO $150	16	9	19	12
$151 TO $200	17	13	26	22
$201 TO $300	16	24	14	12
$301 TO $400	21	22	19	25
MORE THAN $400	4	5	4	6
AGE				
18 TO 34	13	13	20	28
35 TO 44	14	12	7	23
45 TO 54	17	26	16	10
55 TO 64	21	20	25	23
65 OR OLDER	35	30	22	18
INCOME				
LESS THAN $14,999	11	16	3	1
$15,000 TO $24,999	24	20	12	25
$25,000 TO $34,999	28	22	38	43
$35,000 TO $49,999	21	25	31	11
$50,000 OR MORE	17	16	16	21
CHILDREN LIVING IN THE HOME				
YES	20	21	25	39
NO	80	79	75	61
EDUCATION				
NO HIGH SCHOOL DEGREE	3	5	-	-
HIGH SCHOOL GRAD	13	11	9	5
SOME COLLEGE	18	15	7	33
COLLEGE GRADUATE	22	22	31	24
POST GRADUATE WORK	6	6	11	5
SEX				
MALE	19	21	15	16
FEMALE	81	79	85	84

*CAUTION: Small base.

FOOD SHOPPER PROFILE
(CONTINUED)

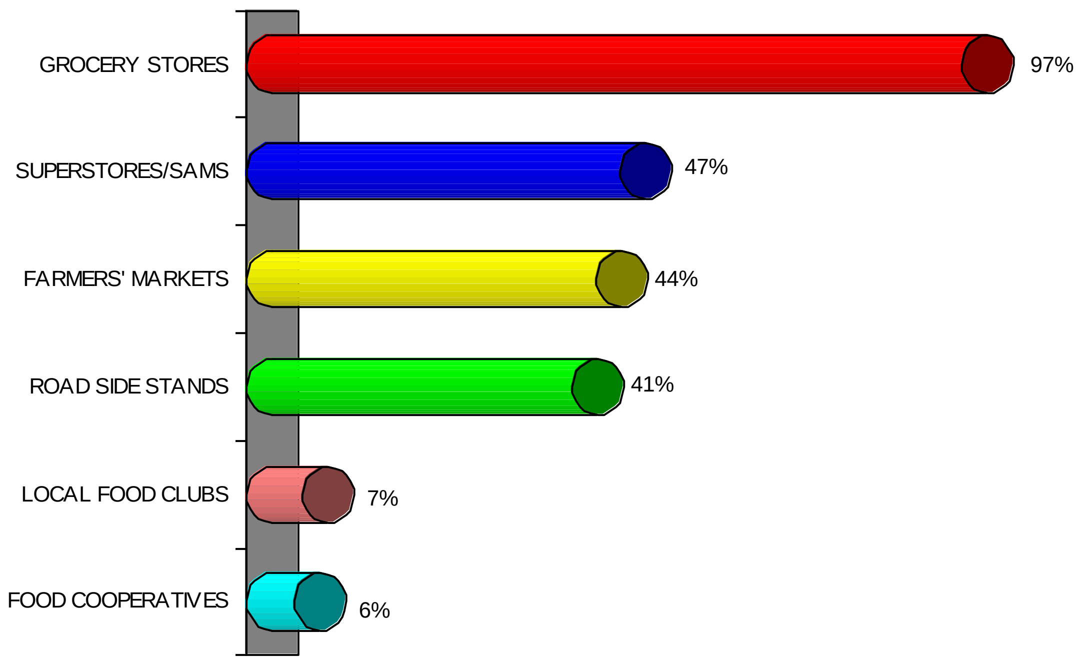
PERCENTAGE OF MONTHLY FOOD BILL SPENT ON LOCALLY PRODUCED FOOD				
	TOTAL STUDY (300) %	0% TO 5% (104) %	6% TO 10% (64) %	11%+ (43) %
MAJORITY OF NEWS				
TELEVISION	70	67	76	71
NEWSPAPERS	23	26	16	23
RADIO	6	6	8	7
FAVORITE TELEVISION STATION				
CHANNEL 13 WLOS – ABC	82	78	87	77
CHANNEL 4 WYFF – NBC	7	14	-	10
CHANNEL 7 WSPA - CBS	5	4	3	-
CHANNEL 21 WHNS – FOX	3	1	8	8
CHANNEL 33 WUNF – PBS	3	2	2	5
FAVORITE LOCAL RADIO STATION				
WWNC 570 AM	31	26	38	20
WKSF 99.9 FM	16	19	9	17
WMIT 106.9 FM	13	17	7	10
WCQA 88.1 FM	12	7	17	40
WHKP	6	11	2	8
WISE 1310 AM	5	0	-	1
WNCW 88.7 FM	4	5	-	-
WSKY 1230 AM	3	4	1	-
WKIV 1380 AM	0	-	1	-
OTHER	9	11	26	4
NEWSPAPERS READ REGULARLY				
ASHEVILLE CITIZENS TIMES	72	65	69	77
HENDERSON TIMES NEWS	23	29	27	23
SENTINEL	1	1	1	-
NEWS RECORD	0	0	-	-
MOUNTAIN XPRESS	1	2	-	-
OTHER	3	3	3	-

*CAUTION: Small base.

FREQUENCY OF SHOPPING AT VARIOUS VENUES[7]

% RATING FREQUENTLY OR SOMETIMES

Asheville area consumers were asked how often they shop at six different food venues. As expected, grocery stores are, by far, the most popular place to shop for food. Superstores/Sam's, rank a distant second followed closely by farmers markets and road side stands.



There are no significant differences in shopping patterns among the residents of Buncombe, Madison, and Henderson counties.

	COUNTY			
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
GROCERY STORES	97	96	100	100
SUPERSTORES/SAMS	47	47	54	46
FARMERS' MARKETS	44	44	42	45
ROAD SIDE STANDS	41	36	43	52
LOCAL FOOD CLUBS	7	8	6	6
FOOD COOPERATIVES	6	7	3	6

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

7 *"For each place I mention, please tell me if you shop there frequently, sometimes, seldom, or never."*

FREQUENCY OF SHOPPING AT VARIOUS VENUES[8]

% RATING FREQUENTLY OR SOMETIMES

(CONTINUED)

In general, the older the consumer the more likely she shops at farmers' markets and road side stands.

	TOTAL STUDY (300) %	AGE: UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
GROCERY STORES	97	100	100	100	90	98
SUPERSTORES/SAMS	47	64	47	47	47	42
FARMERS' MARKETS	44	25	54	27	49	54
ROAD SIDE STANDS	31	20	44	29	45	50
LOCAL FOOD CLUBS	7	6	10	6	8	8
FOOD COOPERATIVES	6	6	17	2	9	4

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

Consumers with household incomes of $25,000 to $34,999 are much more likely to patronize road side stands than other consumers.

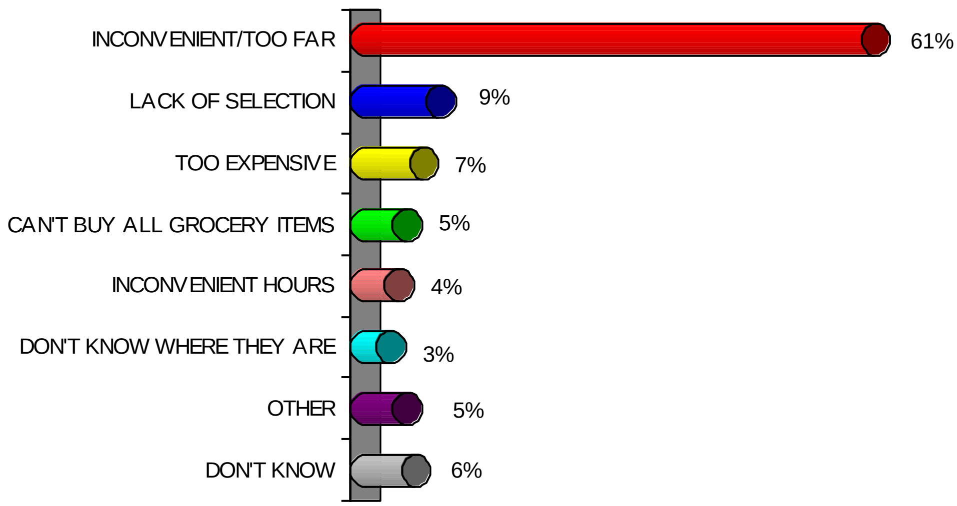
	TOTAL STUDY (300) %	INCOME: UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
GROCERY STORES	97	97	100	95	100
SUPERSTORES/SAMS	47	52	40	61	50
FARMERS' MARKETS	44	45	59	33	59
ROAD SIDE STANDS	31	43	57	23	45
LOCAL FOOD CLUBS	7	3	5	15	7
FOOD COOPERATIVES	6	0	6	15	15

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

8 *"For each place I mention, please tell me if you shop there frequently, sometimes, seldom, or never."*

REASONS FOR NOT SHOPPING AT FARMERS' MARKETS MORE OFTEN[9]

Consumers who seldom or never shop at farmers' markets were asked why they don't shop at farmers' markets more often. Their responses reveal that the most common reason for not patronizing farmers' markets more often is inconvenient locations (61%). Indeed, 3% do not know where a farmers' market is located.



Madison County residents are much more likely than Buncombe and Henderson county residents to indicate they do not know where a farmers market is or that they don't know anything about them when describing why they don't shop at farmers' markets more often.

	COUNTY			
	TOTAL STUDY (166) %	BUNCOMBE (56) %	MADISON (56) %	HENDERSON (54) %
INCONVENIENT/TOO FAR	61	59	71	65
LACK OF SELECTION	9	11	4	7
TOO EXPENSIVE/HIGH PRICES	7	9	2	4
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	5	5	2	6
INCONVENIENT HOURS	4	5	-	-
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	3	-	20	6
OTHER	5	4	-	6
DON'T KNOW	6	7	2	6

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

9 *"Why don't you shop at Farmers' Markets more often?"*

REASONS FOR NOT SHOPPING AT FARMERS' MARKETS MORE OFTEN[10]

(CONTINUED)

As might be expected, seniors are much more likely than younger consumers to avoid farmers markets because they are inconveniently located.

		AGE				
	TOTAL STUDY (166) %	UNDER 35 (25) %	35 TO 44 (19) %	45 TO 54 (31) %	55 TO 64 (35) %	65 & OLDER (48) %
INCONVENIENT/TOO FAR	61	47	63	52	65	73
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	3	3	2	1	2	3
LACK OF SELECTION	9	13	1	16	7	9
TOO EXPENSIVE/HIGH PRICES	7	21	-	8	3	4
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	5	13	-	6	7	2
INCONVENIENT HOURS	4	-	11	6	-	-
OTHER	5	3	15	2	3	4
DON'T KNOW	6	-	9	8	14	4

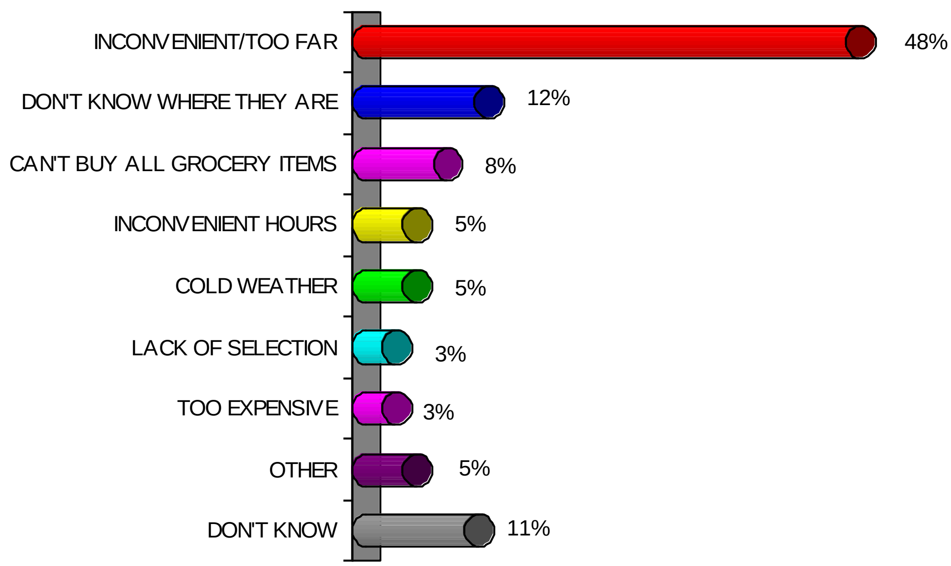
Consumers with annual household incomes less than $25,000 are much more likely to avoid farmers markets because the prices are too high than more affluent consumers.

		INCOME			
	TOTAL STUDY (166) %	UNDER $25,000 (43) %	$25,000-$34,999 (22) %	$35,000-$49,999 (28) %	$50,000 & MORE (15) %
INCONVENIENT/TOO FAR	61	52	44	69	71
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	3	1	8	3	1
LACK OF SELECTION	9	8	26	-	-
TOO EXPENSIVE/HIGH PRICES	7	18	-	-	-
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	5	6	4	7	15
INCONVENIENT HOURS	4	-	9	7	-
OTHER	5	-	9	3	12
DON'T KNOW	6	15	1	10	-

10 *"Why don't you shop at Farmers' Markets more often?"*

REASONS FOR <u>NOT</u> SHOPPING AT ROAD SIDE STANDS MORE OFTEN[11]

Similar to farmers' markets, the most common reason for not shopping at road side stands is convenience. When asked why they don't shop at road side stands more often, 48% of all consumers who do not frequent road side stands said they are inconveniently located. 12% claim they do not know where road side stands are located.



Madison and Henderson county residents are more likely than Buncombe County residents to feel road side stands are inconveniently located.

		COUNTY		
	TOTAL STUDY (166) %	BUNCOMBE (64) %	MADISON (56) %	HENDERSON (46) %
INCONVENIENT/TOO FAR	48	45	57	57
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	12	11	23	11
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	8	9	5	4
LACK OF SELECTION	3	2	7	9
TOO EXPENSIVE/HIGH PRICES	3	2	4	7
INCONVENIENT HOURS	5	6	2	2
COLD OUTSIDE/LACK OF SHELTER/WEATHER	5	6	-	2
OTHER	5	5	-	2
DON'T KNOW	11	13	2	7

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

11 *"Why don't you shop at road side stands more often?"*

REASONS FOR NOT SHOPPING AT ROAD SIDE STANDS MORE OFTEN[12]

(CONTINUED)

In general, the older the consumer the more likely he or she does not frequently patronize road stands because there is not a location convenient to them.

		AGE				
	TOTAL STUDY (166) %	UNDER 35 (26) %	35 TO 44 (20) %	45 TO 54 (27) %	55 TO 64 (31) %	65 & OLDER (57) %
INCONVENIENT/TOO FAR	48	32	49	52	50	57
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	12	22	18	-	1	15
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	8	22	4	7	6	4
LACK OF SELECTION	3	6	-	9	1	2
TOO EXPENSIVE/HIGH PRICES	3	1	-	3	1	7
INCONVENIENT HOURS	5	1	26	-	3	-
COLD OUTSIDE/LACK OF SHELTER/WEATHER	5	-	-	12	6	6
OTHER	5	7	-	-	15	4
DON'T KNOW	11	9	4	18	19	6

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

Reasons for not shopping at road side stands do not vary significantly by income.

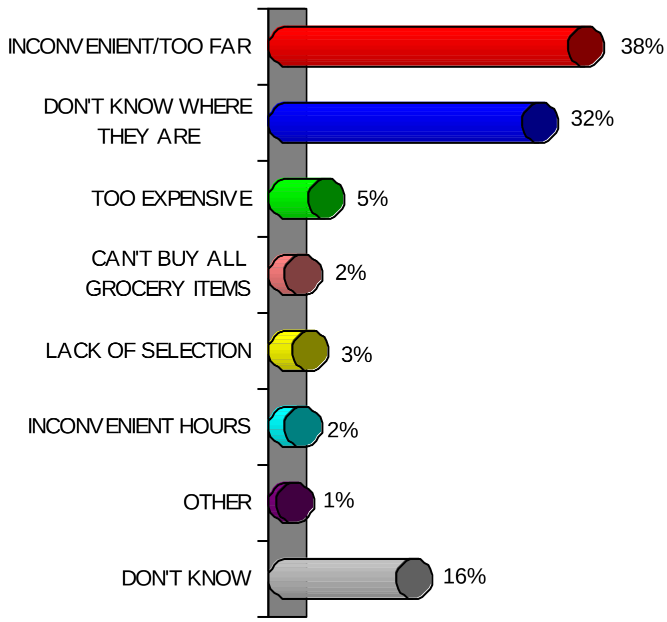
		INCOME			
	TOTAL STUDY (166) %	UNDER $25,000 (42) %	$25,000- $34,999 (21)* %	$35,000- $49,999 (29)* %	$50,000 & MORE (16)* %
INCONVENIENT/TOO FAR	48	39	29	46	73
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	12	6	16	22	17
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	8	11	12	-	-
LACK OF SELECTION	3	2	16	1	-
TOO EXPENSIVE/HIGH PRICES	3	5	-	-	-
INCONVENIENT HOURS	5	2	9	13	-
COLD OUTSIDE/LACK OF SHELTER/WEATHER	5	5	8	6	-
OTHER	5	5	8	6	-
DON'T KNOW	11	24	1	6	11

Yellow shading indicates a significant difference from total study at the 95% confidence interval.
CAUTION: Small base.

12 *"Why don't you shop at road side stands more often?"*

REASONS FOR <u>NOT</u> SHOPPING AT FOOD COOPERATIVES MORE OFTEN[13]

When asked why they do not shop at food cooperatives more often, three in ten (32%) consumers claimed they do not know where they are located or are unfamiliar with them.



Madison County residents are much more likely to indicate that food cooperatives are inconvenient to them than Buncombe and Henderson county residents.

		COUNTY		
	TOTAL STUDY (232) %	BUNCOMBE (85) %	MADISON (79) %	HENDERSON (68) %
INCONVENIENT/TOO FAR	38	35	58	43
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	32	28	37	41
TOO EXPENSIVE/HIGH PRICES	5	6	3	1
LACK OF SELECTION	3	4	-	1
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	2	2	3	1
INCONVENIENT HOURS	2	4	-	-
OTHER	1	1	-	1
DON'T KNOW	16	20	-	10

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

13 *"Why don't you shop at food cooperatives more often?"*

REASONS FOR NOT SHOPPING AT FOOD COOPERATIVES MORE OFTEN[14]

(CONTINUED)

Consumers aged 65 or older are much more likely than younger consumers to claim they do not frequently shop at food cooperatives because they are too expensive and because they cannot buy all their grocery items.

	TOTAL STUDY (232) %	AGE: UNDER 35 (30) %	35 TO 44 (30) %	45 TO 54 (41) %	55 TO 64 (52) %	65 & OLDER (71) %
INCONVENIENT/TOO FAR	38	33	25	38	48	40
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	32	43	35	22	35	30
TOO EXPENSIVE/HIGH PRICES	5	1	7	-	2	10
LACK OF SELECTION	3	3	-	9	4	-
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	2	-	-	1	-	6
INCONVENIENT HOURS	2	-	-	5	-	2
OTHER	1	-	7	-	2	-
DON'T KNOW	16	21	27	25	9	12

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

Regardless of income, the top two reasons for not shopping more frequently at food cooperatives is inconvenient locations and unfamiliarity.

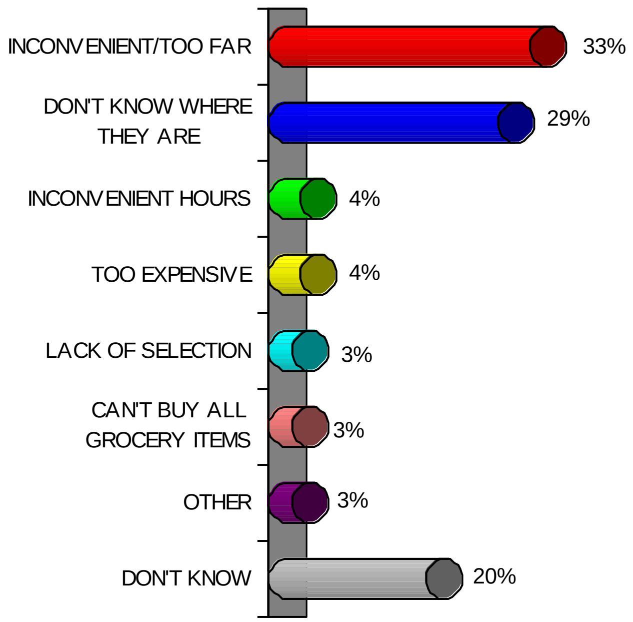
	TOTAL STUDY (232) %	INCOME: UNDER $25,000 (62) %	$25,000-$34,999 (39) %	$35,000-$49,999 (38) %	$50,000 & MORE (24)* %
INCONVENIENT/TOO FAR	38	44	19	39	47
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	32	26	44	50	37
TOO EXPENSIVE/HIGH PRICES	5	4	10	6	-
LACK OF SELECTION	3	-	4	-	-
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	2	4	2	-	-
INCONVENIENT HOURS	2	3	4	-	-
OTHER	1	-	4	-	-
DON'T KNOW	16	20	12	6	16

Yellow shading indicates a significant difference from total study at the 95% confidence interval.
CAUTION: Small base.

14 *"Why don't you shop at food cooperatives more often?"*

REASONS FOR NOT SHOPPING AT LOCAL FOOD CLUBS MORE OFTEN[15]

Similar to food cooperatives, three in ten (29%) infrequent users of local food clubs simply do not know where they are located or are unfamiliar with them.



Four in ten (40%) Madison County residents who do not shop at local food clubs claim they are unfamiliar with them.

		COUNTY		
	TOTAL STUDY (234) %	BUNCOMBE (84) %	MADISON (75) %	HENDERSON (75) %
INCONVENIENT/TOO FAR	33	29	53	39
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	29	25	40	36
TOO EXPENSIVE/HIGH PRICES	4	5	5	1
INCONVENIENT HOURS	4	6	-	1
LACK OF SELECTION	3	4	1	3
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	3	2	-	4
OTHER	3	1	-	4
DON'T KNOW	22	27	-	12

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

15 *"Why don't you shop at local food clubs more often?"*

REASONS FOR <u>NOT</u> SHOPPING AT LOCAL FOOD CLUBS MORE OFTEN[16]

(CONTINUED)

This page presents consumers reasons for not shopping at local food clubs more often by age and income.

		AGE				
	TOTAL STUDY (234) %	UNDER 35 (31) %	35 TO 44 (33) %	45 TO 54 (35) %	55 TO 64 (53) %	65 & OLDER (74) %
INCONVENIENT/TOO FAR	33	32	16	33	44	32
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	29	36	28	26	26	29
INCONVENIENT HOURS	4	-	6	10	-	3
TOO EXPENSIVE/HIGH PRICES	4	3	1	-	1	10
LACK OF SELECTION	3	9	-	5	4	1
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	3	3	-	-	-	7
OTHER	3	-	6	-	10	-
DON'T KNOW	22	18	44	26	15	18

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

		INCOME			
	TOTAL STUDY (234) %	UNDER $25,000 (59) %	$25,000-$34,999 (38) %	$35,000-$49,999 (37) %	$50,000 & MORE (25)* %
INCONVENIENT/TOO FAR	33	41	10	36	33
DON'T KNOW WHERE THEY ARE/MUCH ABOUT THEM	29	26	39	41	35
TOO EXPENSIVE/HIGH PRICES	4	3	9	-	-
LACK OF SELECTION	3	-	15	-	-
INCONVENIENT HOURS	4	3	9	-	-
CAN'T BUY ALL GROCERY ITEMS AT ONE STORE	3	3	2	-	-
OTHER	3	1	4	-	7
DON'T KNOW	22	20	10	23	25

Yellow shading indicates a significant difference from total study at the 95% confidence interval.
CAUTION: Small base.

16 *"Why don't you shop at local food clubs more often?"*

VENUE PROFILE

The following two pages present a profile of Asheville area by the venue they frequently or sometimes patronize.

	TOTAL STUDY (400) %	GROCERY STORE (286) %	SUPER./ SAMS (141) %	FARMER MARKET (126) %	ROAD SIDE STAND (126) %	FOOD COOP. (16)* %	FOOD CLUB (19)* %
				VENUE			
FREQUENCY OF SHOPPING FOR FOOD							
MORE THAN ONCE A WEEK	45	45	51	49	41	50	33
ABOUT ONCE A WEEK	40	42	38	35	44	49	44
EVERY TWO WEEKS	10	9	7	11	12	1	14
EVERY THREE WEEKS	1	1	-	1	2	-	-
ONCE A MONTH	3	3	5	3	1	-	9
FOOD EXPENDITURES							
LESS THAN $50	6	6	5	6	8	-	-
$51 TO $100	21	21	18	24	21	10	19
$101 TO $150	16	16	18	19	17	-	1
$151 TO $200	17	16	17	15	14	27	35
$201 TO $300	16	16	11	13	15	27	14
$301 TO $400	21	21	26	20	23	36	32
MORE THAN $400	4	4	4	4	2	-	-
PERCENTAGE GROWN LOCALLY							
0% TO 5%	49	50	53	39	45	17	25
6% TO 10%	30	30	30	40	30	54	53
11 TO 20%	9	9	8	7	10	15	0
MORE THAN 20%	11	10	9	15	16	14	22
AGE							
18 TO 34	13	14	18	7	6	11	11
35 TO 44	14	14	14	17	15	35	18
45 TO 54	17	17	16	10	12	4	14
55 TO 64	21	19	21	23	23	30	23
65 OR OLDER	35	36	31	43	43	20	33
INCOME							
LESS THAN $14,999	11	11	9	11	10	-	16
$15,000 TO $24,999	24	24	28	22	25	1	-
$25,000 TO $34,999	28	28	22	33	37	22	22
$35,000 TO $49,999	21	20	25	14	11	43	45
$50,000 OR MORE	17	17	16	20	16	34	1
CHILDREN LIVING IN THE HOME							
YES	20	21	26	19	19	26	24
NO	80	79	74	81	81	74	76
EDUCATION							
NO HIGH SCHOOL DEGREE	3	3	1	3	3	-	-
HIGH SCHOOL GRAD	13	11	15	10	15	5	22
SOME COLLEGE	18	18	18	20	20	10	9
COLLEGE GRADUATE	22	23	27	25	12	47	28
POST GRADUATE WORK	6	6	5	7	6	23	9
SEX							
MALE	19	18	17	20	19	16	1
FEMALE	81	82	83	80	81	84	99

*CAUTION: Small base.

VENUE PROFILE
(CONTINUED)

	TOTAL STUDY (400) %	GROCERY STORE (286) %	SUPER./ SAMS (141) %	FARMER MARKET (126) %	ROAD SIDE STAND (126) %	FOOD COOP. (16)* %	FOOD CLUB (19)* %
				VENUE			
MAJORITY OF NEWS							
TELEVISION	70	71	82	77	70	49	80
NEWSPAPERS	23	23	14	17	26	36	18
RADIO	6	7	4	5	4	15	2
FAVORITE TELEVISION STATION							
CHANNEL 13 WLOS – ABC	82	83	82	85	82	77	74
CHANNEL 4 WYFF – NBC	7	7	8	5	7	-	5
CHANNEL 7 WSPA - CBS	5	5	5	2	6	11	11
CHANNEL 21 WHNS – FOX	3	3	5	4	1	11	11
CHANNEL 33 WUNF – PBS	3	2	0	4	4	-	-
FAVORITE LOCAL RADIO STATION							
WWNC 570 AM	31	31	35	41	41	-	18
WKSF 99.9 FM	16	17	12	10	18	6	13
WMIT 106.9 FM	13	13	15	16	9	-	1
WCQA 88.1 FM	12	11	8	17	9	67	30
WHKP	6	7	3	4	7	-	6
WISE 1310 AM	5	5	6	3	3	-	-
WNCW 88.7 FM	4	4	6	1	1	12	1
WSKY 1230 AM	3	1	-	0	3	-	-
WKIV 1380 AM	0	0	0	0	0	-	-
OTHER	9	10	16	7	8	14	36
NEWSPAPERS READ REGULARLY							
ASHEVILLE CITIZENS TIMES	72	71	74	73	62	77	82
HENDERSON TIMES NEWS	23	24	21	22	32	17	18
SENTINEL	1	1	1	1	1	-	-
NEWS RECORD	0	0	0	-	0	-	-
MOUNTAIN XPRESS	1	1	-	2	2	4	-
OTHER	3	3	4	2	2	1	-

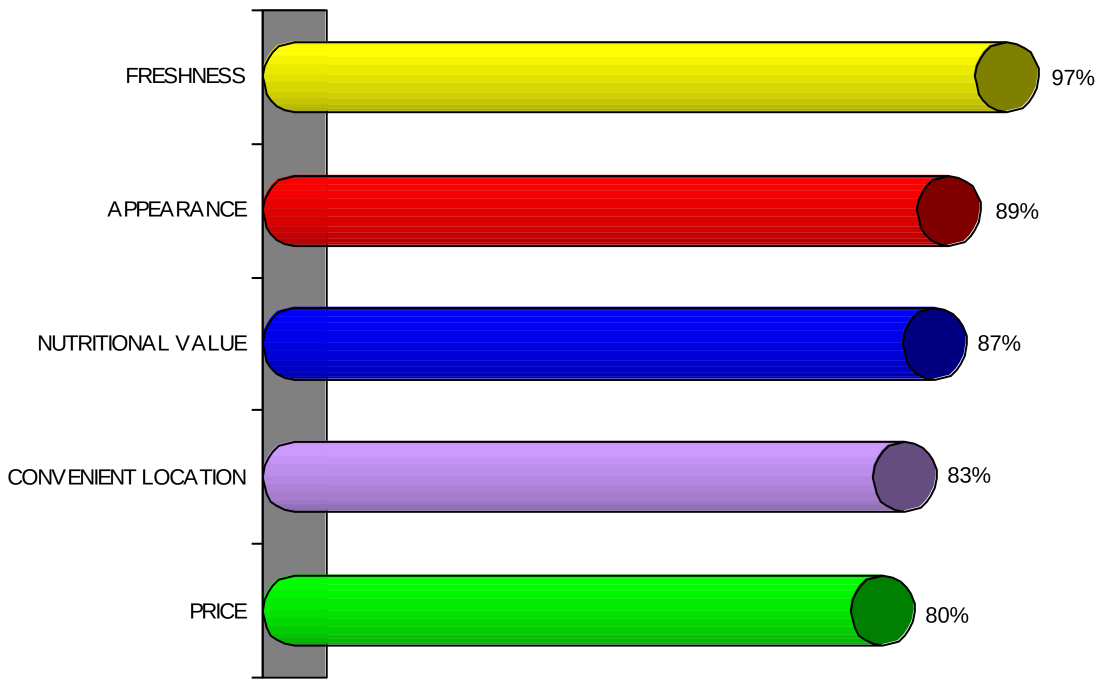
*CAUTION: Small base.

PRIORITIES

PRIORITIES[17]

% RATING A "6" OR "7"

Asheville area consumers were asked to use a "1" to "7" scale to rate the importance of five factors when shopping for food items such as fruit, vegetables, dairy meat and poultry. Their responses reveal that freshness is consumers' top priority followed by appearance and nutritional value.



Food priorities do not vary significantly among residents of Buncombe, Madison, and Henderson counties.

	COUNTY			
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
FRESHNESS	97	96	98	99
APPEARANCE	89	87	87	93
NUTRITIONAL VALUE	87	85	85	91
CONVENIENT LOCATION	83	81	87	88

17 *"Please use a '1`' to '7' scale to rate the importance of several factors when shopping for food."*

PRICE	80	78	76	85

PRIORITIES[18]

% RATING A "6" OR "7"
(CONTINUED)

As might be expected, frequent superstore shoppers are much more likely to be motivated by price than frequent patrons of other venues.

	VENUE						
	TOTAL STUDY (400) %	GROCERY STORE (286) %	SUPER./ SAMS (141) %	FARMER MARKET (126) %	ROAD SIDE STAND (126) %	FOOD COOP. (16)* %	FOOD CLUB (19)* %
FRESHNESS	97	98	96	98	97	90	73
APPEARANCE	89	90	92	88	87	69	80
NUTRITIONAL VALUE	87	87	86	85	92	100	99
CONVENIENT LOCATION	83	84	87	78	84	55	99
PRICE	80	81	87	81	85	34	70

CAUTION: Small base.

Those consumers who spend more than 11% of their food budget on locally produced food are much less motivated by appearance than other consumers.

	% SPENT ON LOCALLY GROWN FOOD			
	TOTAL STUDY (300) %	0% TO 5% (123) %	6% TO 10% (60) %	11%+ (40) %
FRESHNESS	97	99	100	100
APPEARANCE	89	89	92	76
NUTRITIONAL VALUE	87	86	92	84
CONVENIENT LOCATION	83	86	73	74
PRICE	80	86	79	67

18 *"Please use a '1`' to '7' scale to rate the importance of several factors when shopping for food."*

PRIORITIES[19]

% RATING A "6" OR "7"
(CONTINUED)

There are no significant differences in food priorities by age.

		AGE				
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
FRESHNESS	97	100	100	98	100	92
APPEARANCE	89	78	85	87	86	95
NUTRITIONAL VALUE	87	78	92	88	80	90
CONVENIENT LOCATION	83	68	80	91	76	89
PRICE	80	80	80	79	80	77

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

Affluent consumers with household incomes above $50,000 are much less concerned about price when purchasing food than lower income consumers.

		INCOME			
	TOTAL STUDY (300) %	UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
FRESHNESS	97	94	100	100	97
APPEARANCE	89	89	94	83	86
NUTRITIONAL VALUE	87	86	85	92	84
CONVENIENT LOCATION	83	86	82	90	76
PRICE	80	90	91	78	56

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

19 *"Please use a '1'' to '7' scale to rate the importance of several factors when shopping for food."*

SATISFACTION WITH VENUES[20]

Asheville area consumers were asked to use a "1" to "7" scale to indicate their overall satisfaction with six venues for the five attributes measured. Findings reveal that …

- Farmers' markets enjoy have the best image among the five venues tested for freshness and nutritional value.
- Road side stands and food clubs tie for the best price image.
- Grocery stores and superstores tie for the best image for appearance.
- Grocery stores have the best image for convenience.

	VENUE					
	GROCERY STORES %	SUPERST-ORE/SAMS %	FARMERS' MARKETS %	ROADSIDE STANDS %	FOOD COOPS. %	FOOD CLUBS %
FRESHNESS	83	79	92	84	73	76
NUTRITIONAL VALUE	80	71	87	82	75	72
PRICE	66	69	69	68	70	70
APPEARANCE	83	83	78	69	76	78
CONVENIENT LOCATION	85	65	51	58	35	35

Blue shading indicates the highest score for each attribute measured.

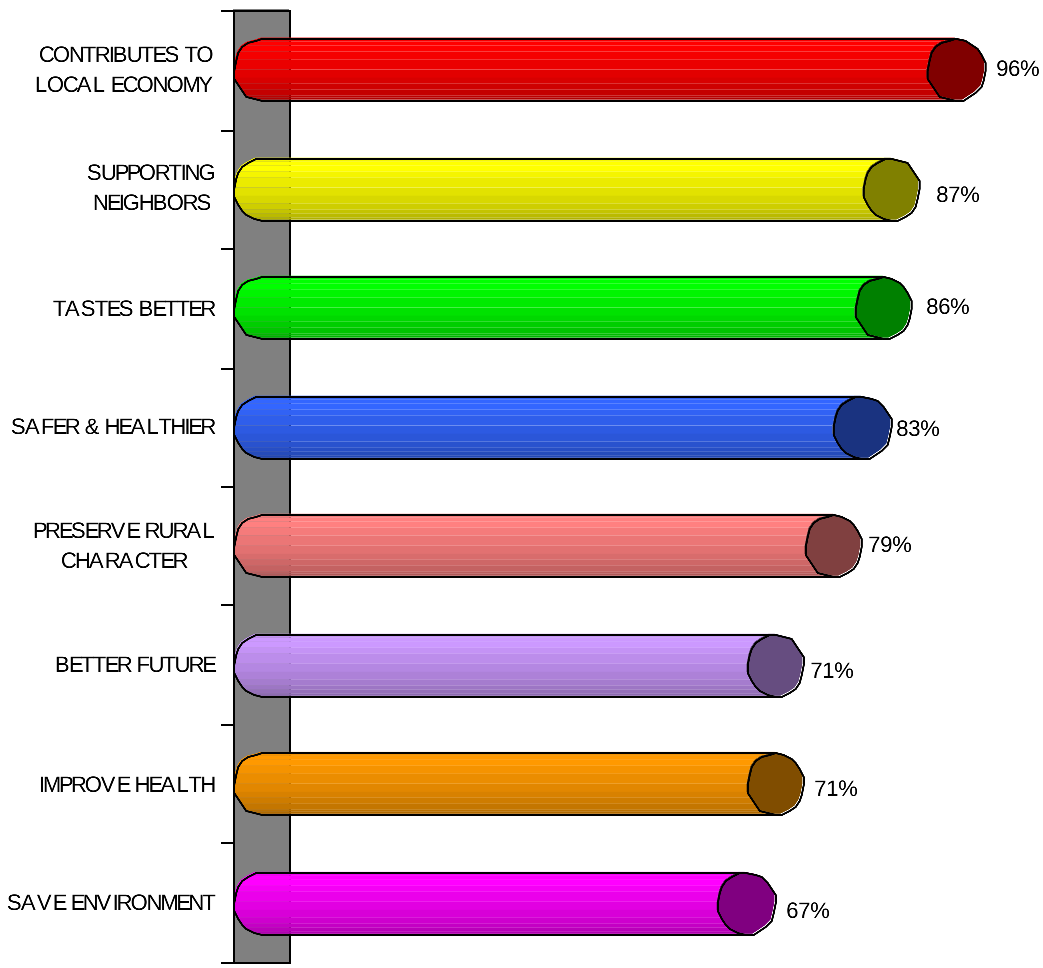
20 *"Please use a '1'' to '7' scale to rate your satisfaction with several places when shopping for these food items."*

LOCALLY GROWN FOOD PERCEPTIONS

STATEMENTS ON BELIEVABILITY[21]

% VERY OR SOMEWHAT BELIEVABLE

Consumers were asked how strongly they believe eight statements about locally grown foods. Findings reveal that almost all (96%) consumers believe the statement*, "Buying locally grown foods contributes to the economy."*



21 *"For each statement I read, please tell me how believable the statement is to you."*

STATEMENTS ON BELIEVABILITY[22]

(CONTINUED)

This table presents all consumers' responses when rating the believability of each statement.

	VERY BELIEVABLE	SOMEWHAT BELIEVEABLE	NOT VERY BELIEVABLE	NOT AT ALL BELIEVABLE	DON'T KNOW
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	73	23	3	1	1
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	68	19	8	4	1
LOCALLY GROWN FOOD USUALLY TASTES BETTER	63	23	7	5	1
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	51	32	10	6	1
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OR YOUR REGION	59	20	14	6	1
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	47	24	19	7	3
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	47	24	20	8	1
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	40	27	19	11	3

22 *"For each statement I read, please tell me how believable the statement is to you."*

STATEMENTS ON BELIEVABILITY[23]

% VERY OR SOMEWHAT BELIEVABLE
(CONTINUED)

There are no significant differences in believability of the eight statements by county.

	COUNTY			
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	96	95	93	97
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	87	87	94	87
LOCALLY GROWN FOOD USUALLY TASTES BETTER	86	83	87	94
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	83	91	85	85
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OR YOUR REGION	79	75	84	86
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	71	68	81	75
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	71	69	76	74
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	67	65	70	72

23 *"For each statement I read, please tell me how believable the statement is to you."*

STATEMENTS ON BELIEVABILITY[24]

% VERY OR SOMEWHAT BELIEVABLE
(CONTINUED)

Consumers 34 years of age or younger are much less likely to believe the statements*, "Locally grown food usually tastes better," "Locally grown foods are safer and healthier for your family,"* and *"Buying locally produced foods is a way to improve your personal health and individual well-being,"* than older consumers.

Consumers age 34 to 44 are more likely than other consumers to believe the statements …

- *"When you buy locally grown food you are helping to preserve the rural character of your region."*
- *"Buying locally grown food is a way for you to make a statement about making the future better for today's children."*
- *"Buying locally grown foods is a way to improve your personal health and individual well-being."*
- *"When you buy locally grown foods you are helping to save the environment because local farmers use environmentally safer agricultural practices."*

		AGE				
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	96	93	98	94	100	94
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	87	88	90	78	95	88
LOCALLY GROWN FOOD USUALLY TASTES BETTER	86	72	95	81	87	91
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	83	62	94	79	90	85
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OF YOUR REGION	79	67	94	69	80	81
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	71	65	90	69	60	70
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	71	39	85	70	73	76
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	67	49	82	66	66	67

24 *"For each statement I read, please tell me how believable the statement is to you."*

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

STATEMENTS ON BELIEVABILITY[25]

% VERY OR SOMEWHAT BELIEVABLE
(CONTINUED)

Consumers with household incomes under $25,000 are much more likely than other consumers to believe the statement, *"Buying locally produced foods is a way to improve your personal health and well-being."* Those with household incomes of $50,000 or more are much more likely to believe the statement, *"When you buy locally grown food you are supporting your neighbors,"* than less affluent consumers.

	TOTAL STUDY (300) %	INCOME: UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	96	93	97	98	100
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	87	94	84	91	94
LOCALLY GROWN FOOD USUALLY TASTES BETTER	86	91	93	78	85
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	83	85	87	76	78
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OR YOUR REGION	79	77	81	83	75
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	71	69	72	77	78
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	71	80	71	68	75
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	67	65	67	74	40

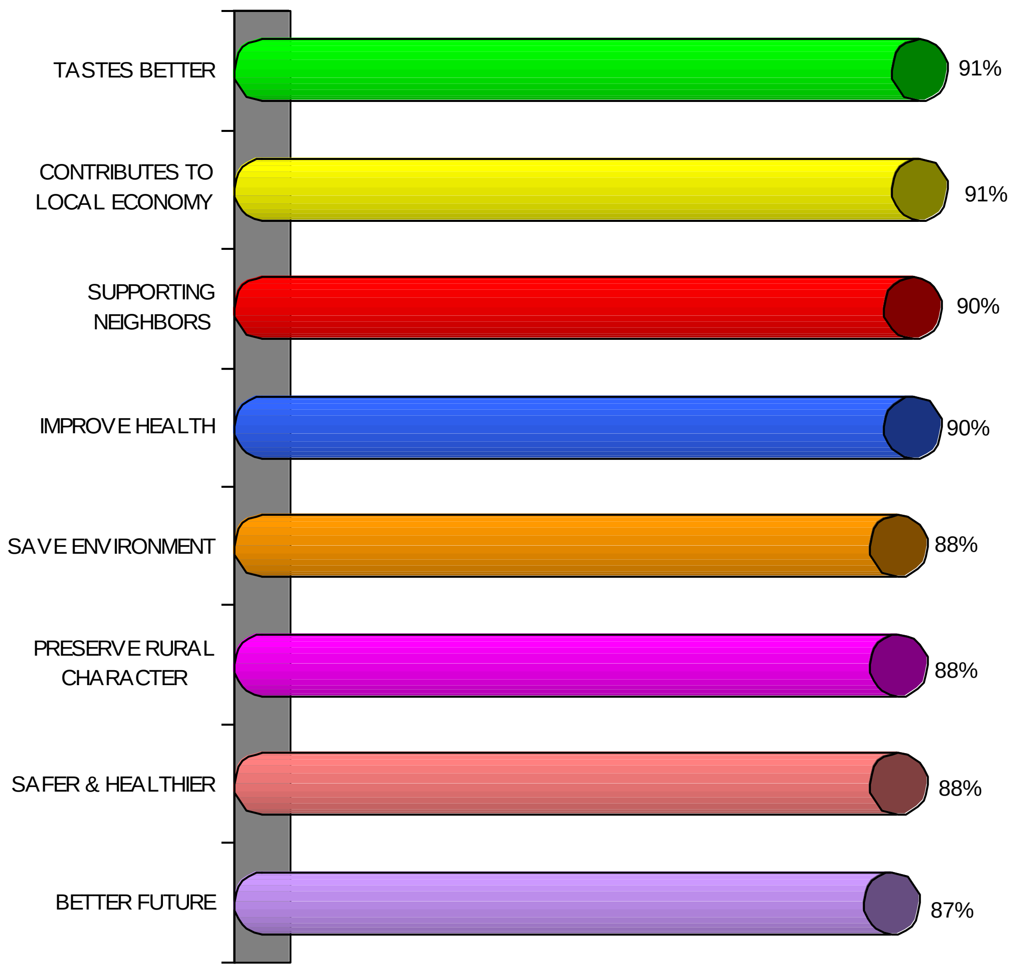
Yellow shading indicates a significant difference from total study at the 95% confidence interval.

25 *"For each statement I read, please tell me how believable the statement is to you."*

LIKELIHOOD OF PURCHASE[26]

% MORE OR SOMEWHAT MORE LIKELY TO BUY

Consumers were also asked if each of the eight statements would make them more likely to buy, somewhat more likely to buy or have no effect on their purchases of locally grown food. Their responses reveal that these statements, if believed to be true, would motivate most consumers to purchase locally grown food.



26 *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[27]
(CONTINUED)

This table presents all consumers' responses when indicating whether each statement would motivate them to purchase locally grown food.

	MUCH MORE LIKELY TO BUY	SOMEWHAT MORE LIKELY TO BUY	NO EFFECT	DON'T KNOW
LOCALLY GROWN FOOD USUALLY TASTES BETTER	68	23	9	-
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	61	30	9	-
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	61	29	10	0
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	67	23	10	-
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	58	30	11	0
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OR YOUR REGION	64	24	11	1
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	59	29	11	0
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	57	30	12	1

27 *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[28]

% MORE OR SOMEWHAT MORE LIKELY TO BUY
(CONTINUED)

Across the board, the statements about locally grown food are more likely to motivate Buncombe County residents than residents of Madison and Henderson counties.

		COUNTY		
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
LOCALLY GROWN FOOD USUALLY TASTES BETTER	91	96	87	80
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	91	95	82	80
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	90	96	88	79
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	90	96	86	79
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	88	96	86	75
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OR YOUR REGION	88	95	80	76
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	88	93	84	80
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	87	94	84	74

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

28 *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[29]

% MORE OR SOMEWHAT MORE LIKELY TO BUY
(CONTINUED)

In general, there are no significant differences in likelihood of purchase of locally grown food by age.

	TOTAL STUDY (300) %	AGE: UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
LOCALLY GROWN FOOD USUALLY TASTES BETTER	91	97	89	92	88	91
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	91	97	83	94	87	91
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	90	98	88	91	85	91
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	90	92	88	91	87	91
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	88	95	87	97	83	86
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OR YOUR REGION	88	95	86	84	86	89
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	88	95	83	91	83	91
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	87	85	88	91	87	86

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

29 *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[30]

% MORE OR SOMEWHAT MORE LIKELY TO BUY
(CONTINUED)

In general, the propensity to purchase locally grown food based on the eight statements measured does not vary significantly by income.

		INCOME			
	TOTAL STUDY (300) %	UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
LOCALLY GROWN FOOD USUALLY TASTES BETTER	91	89	86	90	92
BUYING LOCALLY GROWN FOOD GREATLY CONTRIBUTES TO THE LOCAL ECONOMY	91	88	86	86	94
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE SUPPORTING YOUR NEIGHBORS	90	86	84	91	93
BUYING LOCALLY PRODUCED FOODS IS A WAY TO IMPROVE YOUR PERSONAL HEALTH & INDIVIDUAL WELL-BEING	90	87	82	87	92
WHEN YOU BUY LOCALLY GROWN FOODS YOU ARE HELPING TO SAVE THE ENVIRONMENT BECAUSE LOCAL FARMERS USE ENVIRONMENTALLY SAFER AGRICULTURAL PRACTICES	88	86	77	89	94
WHEN YOU BUY LOCALLY GROWN FOOD YOU ARE HELPING TO PRESERVE THE RURAL CHARACTER OR YOUR REGION	88	86	83	86	91
LOCALLY GROWN FOODS ARE SAFER & HEALTHIER FOR YOUR FAMILY	88	88	81	82	93
BUYING LOCALLY GROWN FOOD IS A WAY FOR YOU TO MAKE A STATEMENT ABOUT MAKING THE FUTURE BETTER FOR TODAY'S CHILDREN	87	85	81	80	92

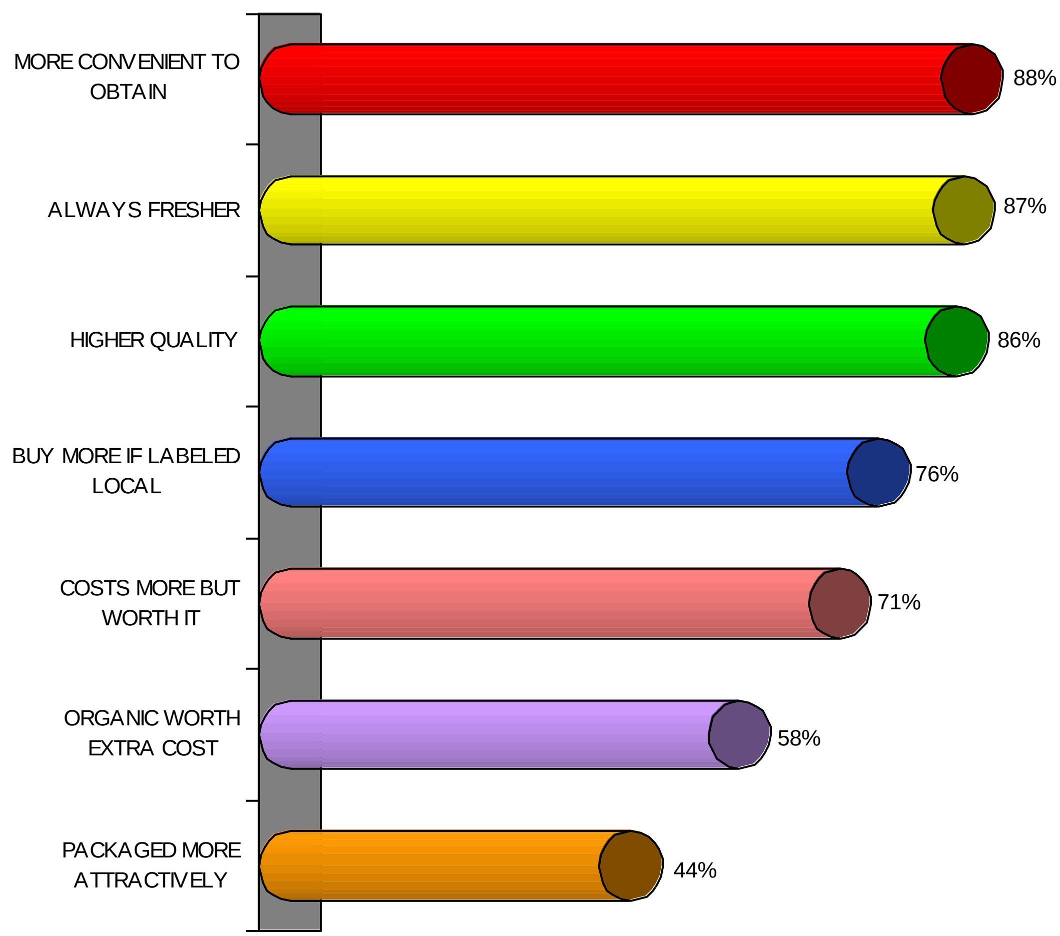
Yellow shading indicates a significant difference from total study at the 95% confidence interval.

30 *"For each statement, please tell me if the statement would make you …."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[31]

% STRONGLY OR SOMEWHAT AGREE

Consumers were asked how strongly they agree or disagree with seven statements about the benefits of locally grown food versus food produced outside the local area. Their responses reveal that nine in ten (88%) consumers strongly or somewhat agree with the statement, *"I would buy more locally produced foods if they were more convenient to obtain*." Less than half (44%) strongly or somewhat agree with the statement, *"I would by more locally produced foods if they were packaged more attractively."*



31 *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[32]

% STRONGLY OR SOMEWHAT AGREE
(CONTINUED)

This table presents the percentage of respondents who *strongly* or *somewhat* agree with each statement measured by the county they live in.

	COUNTY			
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
I WOULD BUY MORE LOCALLY PRODUCED FOODS IF THEY WERE MORE CONVENIENT TO OBTAIN	88	88	91	88
LOCALLY PRODUCED FOODS ARE ALWAYS FRESHER	87	88	85	84
LOCALLY PRODUCED FOODS OFFER HIGHER QUALITY	86	86	85	87
I WOULD BUY MORE LOCALLY PRODUCED FOODS IF THEY WERE LABELED AS LOCAL	76	76	74	75
WHEN LOCALLY PRODUCED FOODS COST A LITTLE MORE, THEY ARE WORTH THE EXTRA COST.	71	68	82	76
WHEN LOCALLY PRODUCED ORGANIC FOODS COST MORE THAN OTHER LOCALLY PRODUCED FOODS THEY ARE WORTH THE EXTRA COST	58	62	41	51
I WOULD BUY MORE LOCALLY GROWN FOODS IF THEY WERE PACKAGED MORE ATTRACTIVELY	44	46	46	39

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

---

32 *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[33]

% STRONGLY OR SOMEWHAT AGREE
(CONTINUED)

Interestingly, 60% of all consumers aged 65 or older claim they would be more likely to purchase locally produced food if it were packaged more attractively.

	TOTAL STUDY (300) %	AGE				
		UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
I WOULD BUY MORE LOCALLY PRODUCED FOODS IF THEY WERE MORE CONVENIENT TO OBTAIN	88	94	100	92	83	86
LOCALLY PRODUCED FOODS ARE ALWAYS FRESHER	87	76	86	85	91	88
LOCALLY PRODUCED FOODS OFFER HIGHER QUALITY	86	78	88	84	84	89
WHEN LOCALLY PRODUCED FOODS COST A LITTLE MORE, THEY ARE WORTH THE EXTRA COST	71	65	69	58	66	80
I WOULD BUY MORE LOCALLY PRODUCED FOODS IF THEY WERE LABELED AS LOCAL	76	72	76	66	80	79
WHEN LOCALLY PRODUCED ORGANIC FOODS COST MORE THAN OTHER LOCALLY PRODUCED FOODS THEY ARE WORTH THE EXTRA COST	58	51	60	48	65	59
I WOULD BUY MORE LOCALLY GROWN FOODS IF THEY WERE PACKAGED MORE ATTRACTIVELY	44	37	25	35	36	60

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

33 *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[34]

% STRONGLY OR SOMEWHAT AGREE
(CONTINUED)

There are no significant differences in consumers intent to purchase locally produced foods if they were more convenient, labeled as local, packaged more attractively by income.

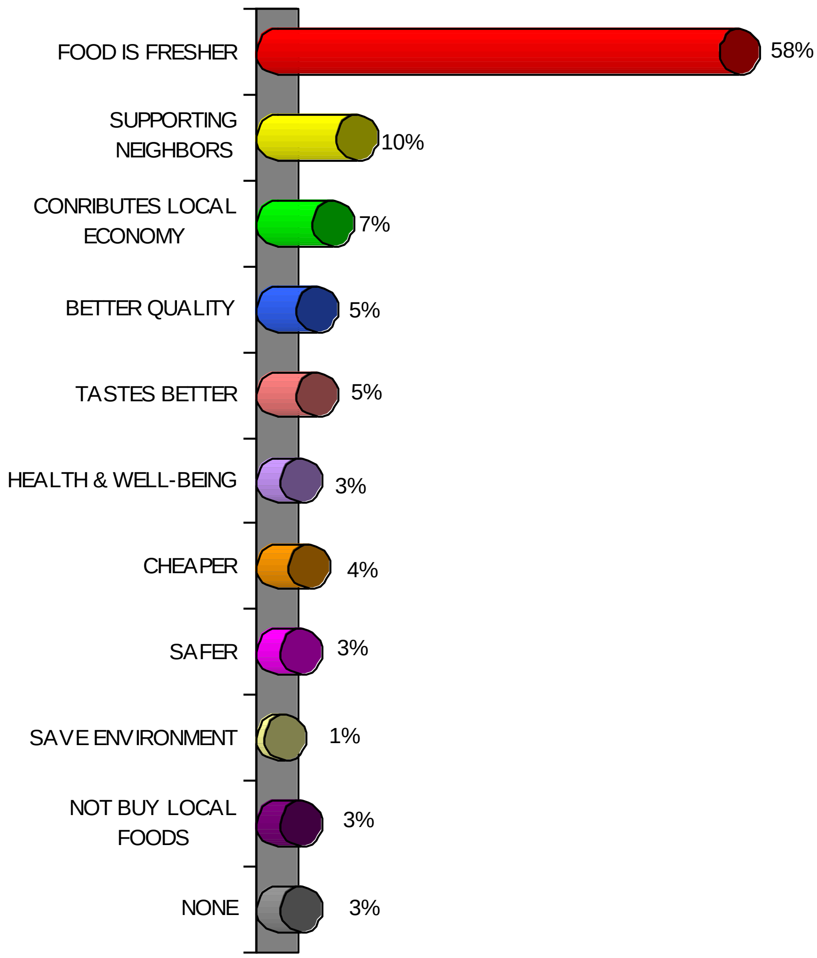
	TOTAL STUDY (300) %	INCOME: UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
I WOULD BUY MORE LOCALLY PRODUCED FOODS IF THEY WERE MORE CONVENIENT TO OBTAIN	88	89	89	90	91
LOCALLY PRODUCED FOODS ARE ALWAYS FRESHER	87	88	94	91	91
LOCALLY PRODUCED FOODS OFFER HIGHER QUALITY	86	86	74	90	90
WHEN LOCALLY PRODUCED FOODS COST A LITTLE MORE, THEY ARE WORTH THE EXTRA COST	71	77	76	67	64
I WOULD BUY MORE LOCALLY PRODUCED FOODS IF THEY WERE LABELED AS LOCAL	76	76	88	75	79
WHEN LOCALLY PRODUCED ORGANIC FOODS COST MORE THAN OTHER LOCALLY PRODUCED FOODS THEY ARE WORTH THE EXTRA COST	58	63	57	66	60
I WOULD BUY MORE LOCALLY GROWN FOODS IF THEY WERE PACKAGED MORE ATTRACTIVELY	44	52	47	41	46

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

34 *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

TOP REASON FOR BUYING LOCALLY PRODUCED FOOD[35]

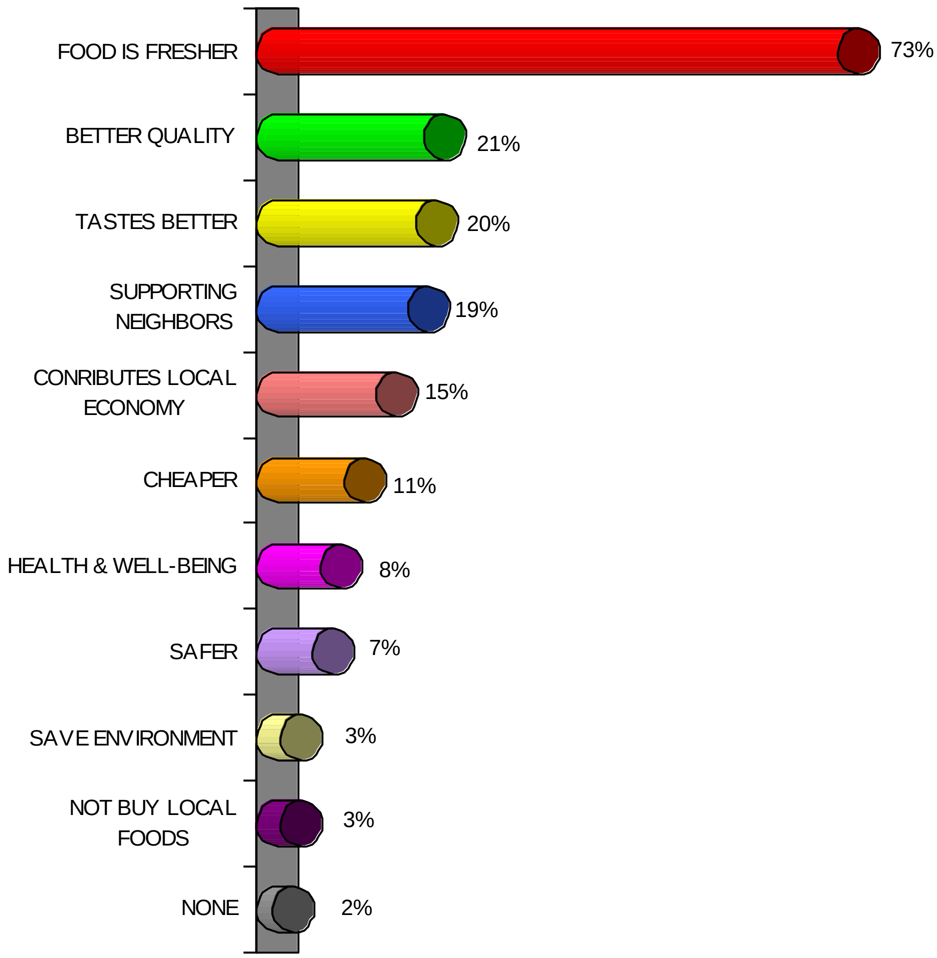
Freshness is, by far, the #1 reason consumers would consider buying locally produced food. When asked what would be the one most important reason they would buy locally produced food, more than half (58%) of all consumers mentioned freshness. Support for neighbors (10%) ranks a distant second followed by contribution to the local economy (7%).



35 *"Could you please tell me the one most important reason why you would buy locally produced food?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[36]

When asked to name *all* the reasons they might buy locally produced food, seven in ten (73%) consumers mentioned freshness. Two in ten mentioned quality (21%), tastes better (20%), and support of neighbors (19%).



[36] *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[37]
(CONTINUED)

Reasons for buying locally produced food varies by county.

		COUNTY		
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
FOOD IS FRESHER	73	74	55	76
FOOD IS OF BETTER QUALITY	21	20	27	21
TASTES BETTER	20	17	12	29
I AM SUPPORTING MY NEIGHBORS	19	18	26	21
IT CONTRIBUTES TO THE LOCAL ECONOMY	15	16	29	11
CHEAPER	11	14	4	6
MY PERSONAL HEALTH & WELL-BEING	8	9	6	5
FOOD IS SAFER	7	7	5	8
I AM HELPING SAVE THE ENVIRONMENT	3	4	3	1
I DON'T BUY LOCALLY PRODUCED FOOD	3	3	4	2
NONE	2	1	5	2

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

37 *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[38]

(CONTINUED)

In general, the older the consumer the more likely freshness is a top reason for buying locally grown food.

		AGE				
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
FOOD IS FRESHER	73	55	60	59	78	88
FOOD IS OF BETTER QUALITY	21	1	22	28	13	28
TASTES BETTER	20	15	12	29	27	18
I AM SUPPORTING MY NEIGHBORS	19	40	16	13	28	11
IT CONTRIBUTES TO THE LOCAL ECONOMY	15	30	19	22	15	6
CHEAPER	11	20	22	6	2	13
MY PERSONAL HEALTH & WELL-BEING	8	8	7	13	8	6
FOOD IS SAFER	7	1	7	6	3	11
I AM HELPING SAVE THE ENVIRONMENT	3	-	-	2	4	2
I DON'T BUY LOCALLY PRODUCED FOOD	3	2	5	-	5	2
NONE	2	3	2	4	-	1

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

38 *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[39]

(CONTINUED)

Freshness is a compelling reason for buying locally grown food among all income segments.

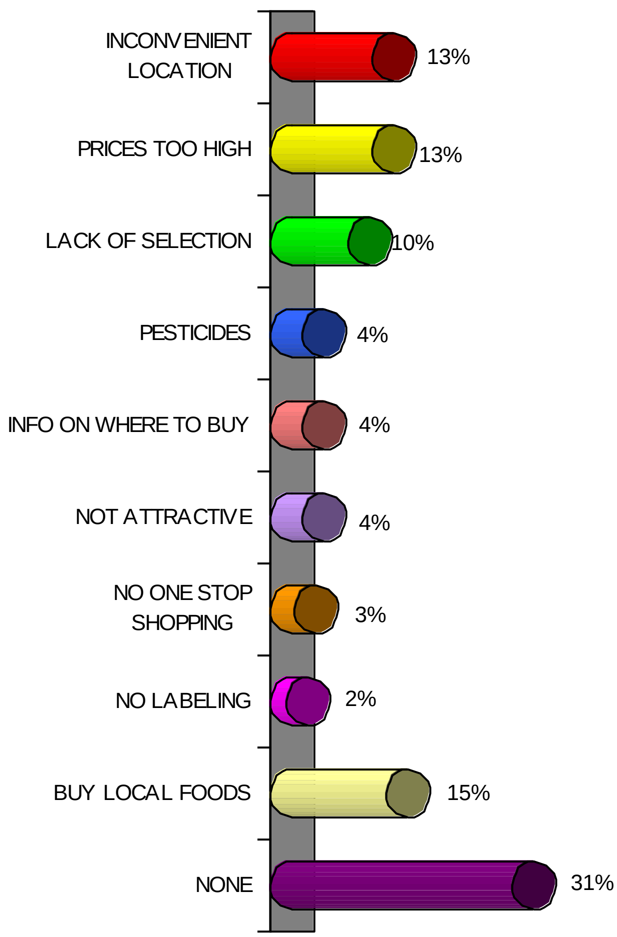
		INCOME			
	TOTAL STUDY (300) %	UNDER $25,000 (75) %	$25,000- $34,999 (52) %	$35,000- $49,999 (42) %	$50,000 & MORE (32) %
FOOD IS FRESHER	73	75	77	56	79
FOOD IS OF BETTER QUALITY	21	24	16	8	27
TASTES BETTER	20	20	23	30	23
I AM SUPPORTING MY NEIGHBORS	19	16	24	13	19
IT CONTRIBUTES TO THE LOCAL ECONOMY	15	7	21	20	11
CHEAPER	11	17	7	20	6
MY PERSONAL HEALTH & WELL-BEING	8	4	9	16	7
FOOD IS SAFER	7	14	11	4	-
I AM HELPING SAVE THE ENVIRONMENT	3	0	-	5	6
I DON'T BUY LOCALLY PRODUCED FOOD	3	3	5	5	-
NONE	2	4	1	-	3

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

39 *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOP REASON FOR NOT BUYING LOCALLY PRODUCED FOOD[40]

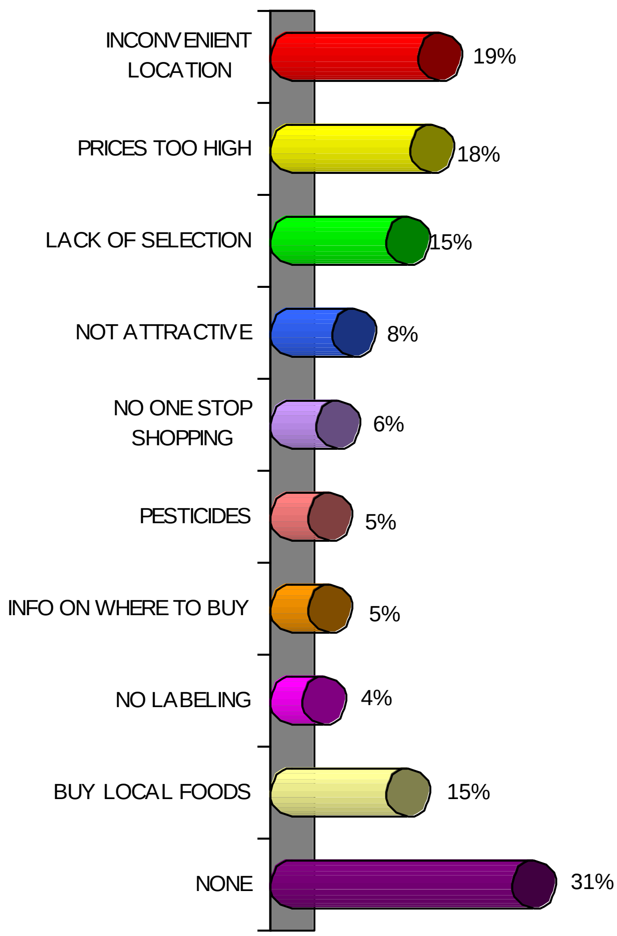
The top reasons for not buying locally produced food is inconvenience and price. When asked to name the one most important reason for not buying locally produced food, 13% of all consumers mentioned inconvenient locations and high prices. 10% feel there is a lack of selection.



40 *"Could you please tell me the one most important reason why you NOT would buy locally produced food?"*

TOTAL REASONS FOR <u>NOT</u> BUYING LOCALLY PRODUCED FOOD[41]

When asked to name *all* their reasons for not buying locally produced food, 19% of all consumers mentioned inconvenient location, 18% mentioned high prices, and 15% mentioned lack of selection.



41 *"Could you please tell me the one most important reason why you <u>NOT</u> would buy locally produced food? Why else wouldn't you buy locally produced food?"*

TOTAL REASONS FOR NOT BUYING LOCALLY PRODUCED FOOD[42]

(CONTINUED)

Consumers in all counties were similarly likely to mention inconvenient locations as a reason for not buying locally produced food. Interestingly, Madison County residents were less likely than other residents to claim high prices are a reason for not buying locally produced food.

		COUNTY		
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
INCONVENIENT LOCATION	19	20	20	17
PRICES TOO HIGH	18	20	10	16
LACK OF SELECTION	15	18	11	9
PESTICIDES	5	5	3	6
FOOD ISN'T PACKAGED ATTRACTIVELY	8	10	3	3
LACK OF INFO ABOUT WHERE TO BUY	5	6	1	5
CAN'T BUY ALL GROCERY ITEMS AT ONE LOCATION	6	6	1	6
NO LABELING ON FOOD INDICATING LOCALLY GROWN	4	5	2	3
I BUY LOCALLY PRODUCED FOOD	15	7	15	34
NONE	31	33	53	23

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

42 *"Could you please tell me the one most important reason why you NOT would buy locally produced food? Why else wouldn't you buy locally produced food?"*

TOTAL REASONS FOR NOT BUYING LOCALLY PRODUCED FOOD[43]
(CONTINUED)

Consumers less than 35 years of age are more likely to mention lack of selection when describing why they would not buy locally produced food than other consumers. Consumers 45 to 54 years of age are more likely than other consumers to mention high prices.

		AGE				
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
INCONVENIENT LOCATION	19	18	27	23	4	22
PRICES TOO HIGH	18	21	13	36	5	21
LACK OF SELECTION	15	33	10	7	12	14
PESTICIDES	5	5	7	2	4	7
FOOD ISN'T PACKAGED ATTRACTIVELY	5	5	-	6	12	11
LACK OF INFO ABOUT WHERE TO BUY	4	5	12	2	9	3
CAN'T BUY ALL GROCERY ITEMS AT ONE LOCATION	4	7	7	10	3	5
NO LABELING ON FOOD INDICATING LOCALLY GROWN	3	5	-	5	5	6
I BUY LOCALLY PRODUCED FOOD	19	8	14	14	24	12
NONE	36	26	33	25	45	29

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

43 *"Could you please tell me the one most important reason why you NOT would buy locally produced food? Why else wouldn't you buy locally produced food?"*

TOTAL REASONS FOR NOT BUYING LOCALLY PRODUCED FOOD[44]

(CONTINUED)

Consumers with household incomes less than $25,000 are less likely than other consumers to feel inconvenient location is a reason for not buying locally produced food.

	TOTAL STUDY (300) %	INCOME UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
INCONVENIENT LOCATION	19	5	14	17	25
PRICES TOO HIGH	18	19	12	19	28
LACK OF SELECTION	15	7	11	24	37
PESTICIDES	5	4	2	5	-
FOOD ISN'T PACKAGED ATTRACTIVELY	8	11	1	7	12
LACK OF INFO ABOUT WHERE TO BUY	5	1	5	10	9
CAN'T BUY ALL GROCERY ITEMS AT ONE LOCATION	6	6	10	9	-
NO LABELING ON FOOD INDICATING LOCALLY GROWN	4	7	4	5	1
I BUY LOCALLY PRODUCED FOOD	15	18	30	5	9
NONE	31	39	25	34	15

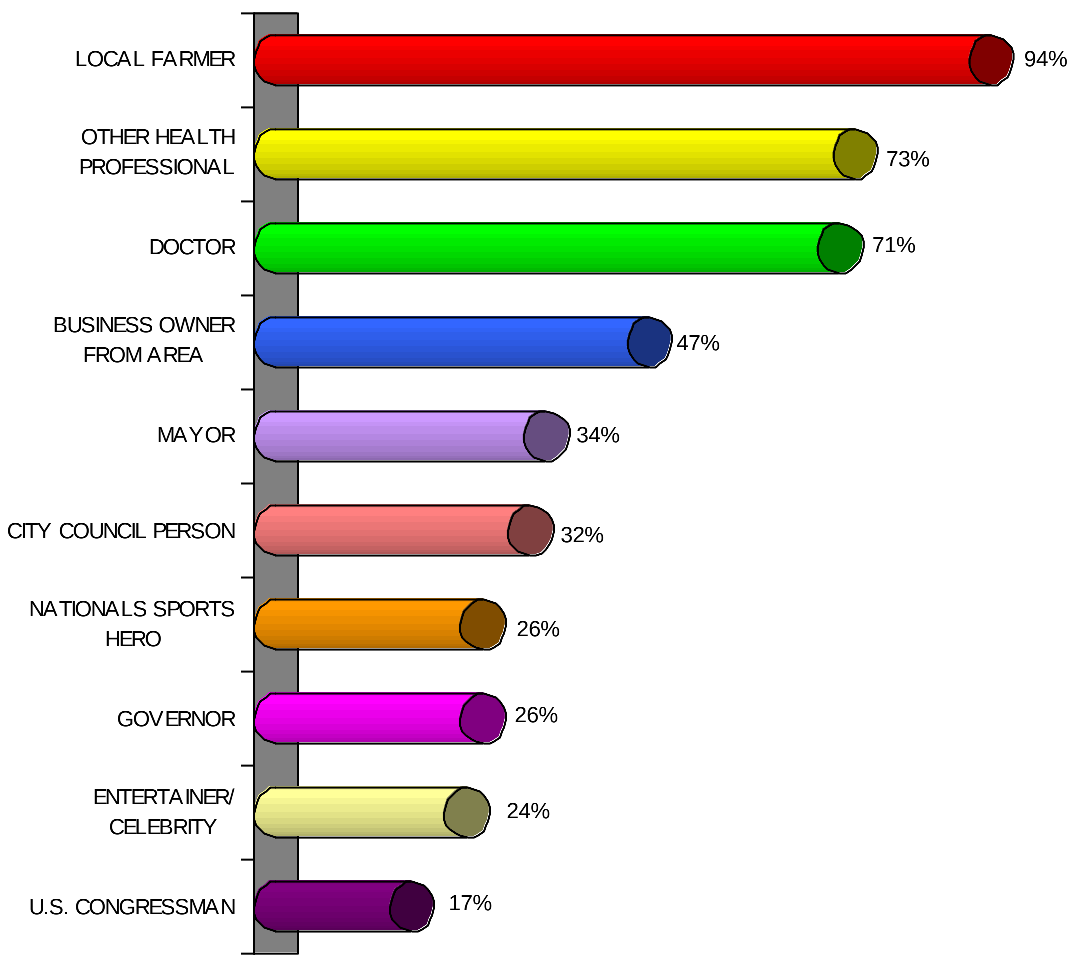
Yellow shading indicates a significant difference from total study at the 95% confidence interval.

44 *"Could you please tell me the one most important reason why you NOT would buy locally produced food? Why else wouldn't you buy locally produced food?"*

POTENTIAL SPOKESPEOPLE[45]

% VERY OR SOMEWHAT CONVINCING

The local farmer is, by far, the most convincing spokesperson for promoting the Buy Local Food campaign. When asked to indicate how convincing 10 spokespeople might be when promoting the Buy Local Food campaign, nine in ten (94%) consumers stated that a local farmer would be *very* or *somewhat* convincing.



45 *"Please indicate how convincing each of these spokespeople might be in a promote Buy Local Food campaign."*

POTENTIAL SPOKESPEOPLE[46]

% RATING VERY OR SOMEWHAT CONVINCING
(CONTINUED)

There are no significant differences in appeal of potential spokespersons by county.

	COUNTY			
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
LOCAL FARMER	94	94	90	93
OTHER HEALTH PROFESSIONAL	73	76	64	67
DOCTOR	71	72	62	70
BUSINESS OWNER FROM AREA	47	46	55	45
MAYOR	34	32	24	39
CITY COUNCIL PERSON OR COUNTY COMMISSIONER	32	29	26	39
NATIONALS SPORTS HERO	26	26	28	27
GOVERNOR	26	28	19	22
ENTERTAINER/CELEBRITY	24	25	22	22
U.S. CONGRESSMAN	17	16	18	20

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

46 *"Please indicate how convincing each of these spokespeople might be in a promote Buy Local Food campaign."*

POTENTIAL SPOKESPEOPLE[47]

% VERY OR SOMEWHAT CONVINCING
(CONTINUED)

Consumers of all age ranges favor a local farmer as a spokesperson for locally produced food.

		AGE				
	TOTAL STUDY (300) %	UNDER 35 (38) %	35 TO 44 (37) %	45 TO 54 (49) %	55 TO 64 (66) %	65 & OLDER (99) %
LOCAL FARMER	94	92	100	100	88	90
OTHER HEALTH PROFESSIONAL	73	82	59	83	73	67
DOCTOR	71	74	59	71	66	74
BUSINESS OWNER FROM AREA	47	52	55	52	34	46
MAYOR	34	53	41	29	35	24
CITY COUNCIL PERSON OR COUNTY COMMISSIONER	32	51	36	28	32	24
NATIONALS SPORTS HERO	26	33	35	24	18	23
GOVERNOR	26	45	29	18	25	22
ENTERTAINER/CELEBRITY	24	24	38	20	22	20
U.S. CONGRESSMAN	17	33	20	14	10	16

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

47 *"Please indicate how convincing each of these spokespeople might be in a promote Buy Local Food campaign."*

POTENTIAL SPOKESPEOPLE[48]

% RATING VERY OR SOMEWHAT CONVINCING
(CONTINUED)

Consumers with household incomes of $35,000 to $49,999 are less likely than other consumers to feel a local farmer is the most appropriate spokesperson for locally produced food campaign.

		INCOME			
	TOTAL STUDY (300) %	UNDER $25,000 (75) %	$25,000-$34,999 (52) %	$35,000-$49,999 (42) %	$50,000 & MORE (32) %
LOCAL FARMER	94	94	91	73	100
OTHER HEALTH PROFESSIONAL	73	64	61	78	85
DOCTOR	71	64	67	73	82
BUSINESS OWNER FROM AREA	47	39	50	55	64
MAYOR	34	37	38	35	41
CITY COUNCIL PERSON OR COUNTY COMMISSIONER	32	39	34	40	29
NATIONALS SPORTS HERO	26	30	31	44	12
GOVERNOR	26	31	20	33	38
ENTERTAINER/CELEBRITY	24	32	29	39	17
U.S. CONGRESSMAN	17	21	10	22	36

Yellow shading indicates a significant difference from total study at the 95% confidence interval.

48 *"Please indicate how convincing each of these spokespeople might be in a promote Buy Local Food campaign."*

RESPONDENT PROFILE

RESPONDENT PROFILE

	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
FREQUENCY OF SHOPPING FOR FOOD				
MORE THAN ONCE A WEEK	45	45	40	47
ABOUT ONCE A WEEK	40	40	48	40
EVERY TWO WEEKS	10	9	9	11
EVERY THREE WEEKS	1	2	1	-
ONCE A MONTH	3	4	2	2
FOOD EXPENDITURES				
LESS THAN $50	6	6	6	4
$51 TO $100	21	19	18	26
$101 TO $150	16	18	11	11
$151 TO $200	17	17	21	16
$201 TO $300	16	15	20	18
$301 TO $400	21	23	19	18
MORE THAN $400	4	3	5	7
PERCENTAGE GROWN LOCALLY				
0% TO 5%	49	45	64	55
6% TO 10%	30	32	21	29
11 TO 20%	9	11	10	6
MORE THAN 20%	11	12	5	10
AGE				
18 TO 34	13	13	13	12
35 TO 44	14	14	8	17
45 TO 54	17	16	16	19
55 TO 64	21	20	27	22
65 OR OLDER	35	48	35	30
INCOME				
LESS THAN $14,999	11	11	16	9
$15,000 TO $24,999	24	27	30	16
$25,000 TO $34,999	28	25	16	39
$35,000 TO $49,999	21	20	21	23
$50,000 OR MORE	17	17	17	15
CHILDREN LIVING IN THE HOME				
YES	20	21	20	20
NO	80	79	80	80
EDUCATION				
NO HIGH SCHOOL DEGREE	13	12	19	12
HIGH SCHOOL GRAD	38	38	44	38
SOME COLLEGE	21	19	18	24
COLLEGE GRADUATE	22	26	13	16
POST GRADUATE WORK	6	5	4	9
SEX				
MALE	19	17	28	20
FEMALE	81	83	72	80

RESPONDENT PROFILE
(CONTINUED)

	COUNTY			
	TOTAL STUDY (300) %	BUNCOMBE (100) %	MADISON (100) %	HENDERSON (100) %
MAJORITY OF NEWS				
TELEVISION	70	69	72	72
NEWSPAPERS	23	24	22	21
RADIO	6	6	7	7
FAVORITE TELEVISION STATION				
CHANNEL 13 WLOS – ABC	82	82	90	82
CHANNEL 4 WYFF – NBC	7	7	5	7
CHANNEL 7 WSPA - CBS	5	4	1	8
CHANNEL 21 WHNS – FOX	3	4	3	2
CHANNEL 33 WUNF – PBS	3	4	1	1
FAVORITE LOCAL RADIO STATION				
WWNC 570 AM	31	33	47	20
WKSF 99.9 FM	16	13	20	22
WMIT 106.9 FM	13	12	15	16
WHKP	6	-	-	27
WCQA 88.1 FM	12	17	4	-
WISE 1310 AM	5	7	4	-
WNCW 88.7 FM	4	3	2	6
WSKY 1230 AM	3	3	4	-
WKIV 1380 AM	0	-	2	-
OTHER	8	7	4	8
NEWSPAPERS READ REGULARLY				
ASHEVILLE CITIZENS TIMES	72	94	84	23
HENDERSON TIMES NEWS	23	1	-	76
SENTINEL	1	-	10	-
NEWS RECORD	0	-	5	-
MOUNTAIN XPRESS	1	1	-	1
OTHER	3	1	1	-

APPENDIX

FINISH TIME:	__ __ : __ __AM/PM	INTERVIEW#:	__ __ __ __	[1:4]
START TIME:	__ __ : __ __AM/PM	STUDY:	__ __ __ __	[5:8]
MINUTES:	__ __	DATE:	__ __/ __ __	[9:12]

COUNTY: [13]
Buncombe..1
Madison 2
Henderson 3

DATA [14:24]

ASAP QUESTIONNAIRE
Revised April 19, 2000

RESPONDENT: ____

ADDRESS: ____

PHONE: ____

Hello. This is *(NAME)* with Research Incorporated, a market research firm. We're conducting a study about places you buy your groceries, and I wonder if you'd help me by answering some questions. Thank you.

S1. Are you the person responsible for doing most of the grocery shopping for your household?

YES .... *[CONTINUE]* 1
NO.. May I please speak with the
.... person who is? 2
[WITH RESPONSIBLE PERSON, REPEAT INTRODUCTION AND CONTINUE IF "NO," TALLY & TERMINATE.]

1	2	3	4	5	6	7	8	9

S2. Is anybody in your household employed by…*[READ LIST]*

A market research firm or advertising agency 1
A newspaper, magazine, radio or TV station 2
A supermarket or grocery store 3

[TALLY & TERMINATE IF "YES" TO ANY OF THE ABOVE]

1	2	3	4	5	6	7	8	9

INTERVIEWER: ________________________________ DATE: ______________

I'd first like to ask you a few questions about your food shopping habits. When I mention food, I am talking about fruits, vegetables, dairy products, meat, and poultry.

1. About how often do you shop for food. Do you shop … *[READ LIST.]*

[25:26]

More than once a week....................01
About once a week....................02
Every two weeks....................03
Every three weeks....................04
Once a month....................05
Other: ________________....................06
[DO NOT READ.] Don't know....................99

2. Generally, how much do you spend on food each month? *[READ LIST ONLY IF RESPONDENT NEEDS PROMPTING.]*

[27:28]

Less than $50....................01
$51 to $100....................02
$101 to $150....................03
$151 to $200....................04
$201 to $300....................05
$301 to $400....................06
More than $400....................06
[DO NOT READ.] Don't know....................99

3. About what percent of your monthly food bill is spent on locally grown foods.

[29:30]

0% to 5%....................01
6% to 10%....................02
11% to 20%....................03
More than 20%....................04
[DO NOT ASK] DON'T KNOW....................99

DATA [31:39]

QUESTIONNAIRE
(CONTINUED)

4. I will now read to you a list of places you can buy food, which includes fruit, vegetables, dairy products, meat, and poultry. For each place I mention, please tell me if you shop there frequently, sometimes, seldom, or never. About how often do you shop at …

A. Grocery store
B. Superstores like Wal-Mart Super Store or Sams
C. Farmers' markets
D. Road side stands
E. Food cooperatives
F. Local food clubs

	A. Grocery stores [40:41]	B. Superstores/ Sams [42:43]	C. Farmers' markets [44:45]	D. Road side stands [46:47]	E. Food cooperatives [48:49]	F. Local food clubs [50:51]
Frequently	01	01	01	01	01	01
Sometimes	02	02	02	02	02	02
Seldomly	03	03	03	03	03	03
Never	04	04	04	04	04	04
Don't Know	99	99	99	99	99	99

DATA [52:55]

[FOR EACH PLACE SHOPPED AT SELDOMLY OR NEVER, ASK Q. 5. OTHERWISE SKIP TO Q. 6.]

5. Why don't you shop at (PLACE) more often? *[DO NOT READ LIST.]*

	A. Grocery stores	B. Superstores/ Sams	C. Farmers' markets [56:65]	D. Road side stands [66:75]	E. Food cooperatives [76:85]	F. Local food clubs [86:95]
Inconvenient/too far from home			01	01	01	01
Lack of selection			02	02	02	02
Too expensive/high prices			03	03	03	03
Don't know where they are/much about them			04	04	04	04
Cold outside/lack of shelter/weather			05	05	05	05
Too crowded			06	06	06	06
Don't like the people that go there			07	07	07	07
Poor customer service/have to wait too long			08	08	08	08
Can't buy all grocery items at one store/location			09	09	09	09
Inconvenient hours of operation			10	10	10	10
Other:________			11	11	11	11
Don't Know			99	99	99	99

DATA [96:99]

QUESTIONNAIRE
(CONTINUED)

6. Please use a “1” to “7” scale to rate the importance of several factors when shopping for food. Remember, food includes fruit, vegetables, dairy products, meat, and poultry. Let “7” mean a factor is very important and a “1” mean the factor is not important at all. You can use any number in between.

7. Now, please use a “1” to “7” scale to rate your satisfaction with several places when shopping for these food items. Let a “7” mean you are *very* satisfied with the outlet and a “1” mean you are not satisfied at all. Please base your rating on what you know about the outlet even if you haven’t used it personally. [DON’T KNOW = “9.”]

	IMPORT-ANCE RATING	A. Grocery stores	B. Superstore/ Sams	C. Farmers’ markets	D. Road side stands	E. Food cooper-atives	F. Local food clubs
Freshness	[100]	[110]	[120]	[130]	[140]	[151]	[160]
Nutritional value	[101]	[111]	[121]	[131]	[141]	[152]	[161]
Price	[102]	[112]	[122]	[132]	[142]	[153]	[162]
Appearance	[103]	[113]	[123]	[133]	[143]	[154]	[163]
Convenient location	[104]	[114]	[124]	[134]	[144]	[155]	[164]
	[105:109]	[115:119]	[125:129]	[135:139]	[145:150]	[156:159]	[165:169]

QUESTIONNAIRE
(CONTINUED)

8. I will now read to you a list of statements about locally grown foods. For each statement I read, please tell me how believable the statement is to you. Is it …

Very believable 1
Somewhat believable.. 2
Not very believable.. 3
Not at all believable 4
[DO NOT READ.] Don't know.. 9

[ASK Q. 9 IF SAID VERY BELIEVABLE OR SOMEWHAT BELIEVABLE IN Q. 8. OTHERWISE, SKIP TO Q. 10.]

9. Now for each of the same statements, please tell me if the statement would make you …

Much more likely to buy locally grown foods 1
Somewhat more likely.. 2
Have no effect 3
[DO NOT READ.] Don't know.. 9

	BELIEVEABLITY	LIKELIHOOD OF PURCHASE
Buying locally grown food greatly contributes to the local economy.	[170]	[185]
Locally grown foods are safer and healthier for your family.	[171]	[186]
When you buy locally grown food you are supporting your neighbors.	[172]	[187]
When you buy locally grown food you are helping to preserve the rural character of your region.	[173]	[188]
Locally grown food usually tastes better.	[174]	[189]
Buying locally grown foods is a way for you to make a statement about making the future better for today's children.	[175]	[190]
When you buy locally grown foods you are helping to save the environment because local farmers use environmentally safer agricultural practices.	[176]	[191]
Buying locally produced foods is a way to improve your personal health and individual well-being.	[177]	[192]
	[178:184]	[193:200]

QUESTIONNAIRE
(CONTINUED)

10. Could you please tell me the one most important reason why you would buy locally produced food. *[DO NOT READ LIST.]*

11. What is the second most important reason? *[DO NOT READ LIST.]*

	FIRST [201:202]	2ND [203:204]
Food is fresher	01	01
Food is of better quality	02	02
It contributes to the local economy	03	03
Food is safer	04	04
I am supporting my neighbors	05	05
I am helping to save the environment	06	06
I am making a statement about making the future better	07	07
My personal health and well-being	08	08
Tastes better	09	09
I don't buy locally produced food	10	10
Other: _________________	11	11
None	99	99

12. Now, please tell me the one most important reason why you would NOT buy locally produced food. *[DO NOT READ LIST.]*

13. What is the second most important reason for NOT buying locally produced food? *[DO NOT READ LIST.]*

	FIRST [205:206]	2ND [207:208]
Inconvenient location	01	01
Lack of selection	02	02
Prices are too high	03	03
Lack of info about where to buy	04	04
Don't like to shop outside	05	05
They are too crowded	06	06
You have to wait in long line	07	07
Can't buy all grocery items at one location	08	08
Hours of operation	09	09
Food isn't packaged attractively	10	10
No labeling on food indicating locally grown	11	11
I buy locally produced food	12	12
Other:____	13	13
None	99	99

DATA [209:214]

QUESTIONNAIRE
(CONTINUED)

14. Now I am going to read some statements about locally produced food as compared to food produced elsewhere or outside of your local area. For each one, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the statement.

	STRONGLY AGREE	SOMEWHAT AGREE	SOMEWHAT DISAGREE	STRONGLY DISAGREE	DON'T KNOW	
Locally produced foods are always fresher.	01	02	03	04	99	[215:216]
Locally produced foods offer higher quality.	01	02	03	04	99	[217:218]
When locally produced foods cost a little more, they are worth the extra cost.	01	02	03	04	99	[219:220]
When locally produced ORGANIC foods cost more than other locally produced foods they are worth the extra cost.	01	02	03	04	99	[221:222]
I would buy more locally grown foods if they were packaged more attractively.	01	02	03	04	99	[223:224]
I would buy more locally produced foods if they were labeled as local.	01	02	03	04	99	[225:226]
I would buy more locally produce foods if they were more convenient to obtain.	01	02	03	04	99	[227:228]

DATA [229:234]

15. Now I am going to read a list of spokespeople who might be considered to promote a Buy Local Food campaign. Please indicate how convincing each one would be. Your choices are very convincing, somewhat convincing, not very convincing, or not at all convincing.

	VERY CONVINCING	SOMEWHAT CONVINCING	NOT VERY CONVINCING	NOT AT ALL CONVINCING	DON''T KNOW	
Local farmer	01	02	03	04	99	[235:236]
Doctor	01	02	03	04	99	[237:238]
Other health professional	01	02	03	04	99	[239:240]
Business owner from the area	01	02	03	04	99	[241:242]
U.S. congressman	01	02	03	04	99	[243:244]
Governor	01	02	03	04	99	[245:246]
Mayor	01	02	03	04	99	[247:248]
City Council person or County Commissioner	01	02	03	04	99	[249:250]
National sports hero	01	02	03	04	99	[251:252]
Entertainer/celebrity	01	02	03	04	99	[253:254]

DATA [255:259]

QUESTIONNAIRE
(CONTINUED)

Now just a few last questions for classification purposes only.

16. Do you get the majority of your news from television, radio or newspapers?

[260:261]

Television	01
Radio	02
Newspapers	03
Don't know/None	99

17. What is your favorite local television station or network?

[262:263]

Channel 13 WLOS - ABC	1
Channel 7 WSPA - CBS	2
Channel 4 WYFF - NBC	3
Channel 21 WHNS - FOX	4
Channel 33 WUNF – PBS	5
Other:______________________	6
Don't know/None	9

18. What is your favorite local radio station?

[264:265]

WWNC 570 AM	01
WSKY 1230 AM	02
WISE 1310 AM	03
WKIV 1380 AM	04
WCQS 88.1 FM	05
WNCW 88.7 FM	06
WKSF 99.9 FM	07
WMIT 106.9 FM	08
Other: ___________________________	09
Don't know/none	99

19. What newspapers do you regularly read?

[266:267]

Asheville Citizens Times	01
Hendersonville Times News	02
Mountain XPress	03
News Record	04
Sentinel	05
Other: _____________________	06
Don't know/none	99

20. Please stop me when I read your age

[268:269]

Under 24	01
25 to 34	02
35 to 44	03
45 to 54	04
55 to 64	05
65 to 74	06
75 or older	07
[DO NOT ASK] REFUSED	99

DATA [270:275]

QUESTIONNAIRE
(CONTINUED)

21. Do you have any children under the age of 18 living in your home?

[276:277]

YES 01
NO 02
REFUSED 99

21. Please stop me when I read the choice that best describes your total income for the past year before taxes and other deductions. Was it…

[278:279]

Under $14,999 01
$15,000 to $24,999 02
$25,000 to $34,999 03
$35,000 to $49,999 04
$50,000 to $ 75,000 05
$75,001 to $100,000 06
More than $100,000 07
[DO NOT ASK] REFUSED 99

22. What is the last grade of school you had the opportunity to complete?

[280:281]

Grade school 01
Some high school 02
High school graduate 03
Some college 04
College graduate 05
Graduate school 06
Technical school 07
[DO NOT ASK] REFUSED 99

23. We want to be sure that we include the opinion of people of all races and origins. Please stop me when I read the term that best describes your race or national origin.

[282:283]

African-American 01
Hispanic 02
Asian-American 03
White 04
America Indian or Aleut 05
[DO NOT ASK] REFUSED 99

25. *[DO NOT ASK, BUT MARK]* SEX

[284:285]

MALE 01
FEMALE 02

DATA [286:350]

Thank you very much for helping me today. May I please have your name, address, and phone number in case my supervisor needs to verify my work? Thank you.

NAME: ______________________________ PHONE: ____________________

ADDRESS: ____