

March 2013

Research Report

Specialty Crop Block Grant Synthesis
Report

USDA & FDACS

Written by Laura Conaway & Joy N. Goodwin



Center for Public Issues Education
IN AGRICULTURE AND NATURAL RESOURCES
UFIFAS

Contents

Background.....	3
Methods.....	3
Findings.....	4
Local Choice & Economic Impact Comparison Findings	4
Similar Findings	4
Differential Findings.....	9
MarketMaker & Local Choice Comparison Findings	10
Similar Findings	10
Differential Findings.....	15
Implications	18
Local Choice and Economic Impact Comparison Implications.....	18
MarketMaker and Local Choice Comparison Implications.....	19
Recommendations	20
General Recommendations.....	21
Recommendations for Small-Scale Producers	21
Short-Term Recommendations – Immediate.....	21
Medium-Term Recommendations – 1-5 years.....	22
Long-Term Recommendations – 5-10 years.....	22
Recommendations for Large-Scale Producers	22
Short-Term Recommendations – Immediate.....	23
Conclusion.....	23

Background

The rising transportation and input costs associated with food production, coupled with consumers' changing preferences for locally grown and healthier food have created a need to explore the development and economic impact of localized consumer markets. In order for local producers to remain viable, they need to be provided with means by which to market their products as well as connect with consumers interested in purchasing food grown locally. In order to explore the potential development of localized markets, it is important to understand consumers' current food purchasing behaviors, as well as their opinions and perceptions and how they define local food. By further understanding the needs of producers and consumers, researchers may be able to analyze and determine how to effectively communicate with consumers interested in purchasing local food. This would ultimately support the growth of the Florida agriculture industry as a whole.

Therefore, to address the needs discussed above, the PIE Center, in partnership with the UF/IFAS Food and Resource Economics department, sought to discover the economic impact of local food, consumers' perceptions of local food and producers' current marketing practices regarding local food, as well as their needs for improved marketing. A USDA and Florida Department of Agriculture and Consumer Services (FDACS) Specialty Crop Block Grant funded this three-part research project. This document provides a synthesis of all three research projects and identifies the commonalities and differences among the major findings of the research.

The mission of the UF/IFAS Center for Public Issues Education (PIE Center) is to enhance public understanding of issues in agriculture and natural resources through practical research in education, communication and leadership development.

Methods

To create this synthesis document, the three reports from each piece of the research project were analyzed through qualitative comparison. The reports analyzed included Local Food Systems in Florida (2013) report, authored by Alan Hodges, the Local Choice Report (2013), authored by Joy Goodwin and the Florida MarketMaker Report (2013), authored by Laura Conaway. The following provides further detail of the methods used to complete each research component:

Local Food Systems in Florida (Economic Impact) Research Component

The Local Food Systems in Florida research component was conducted to assess the current economic impact of local food in Florida, as well as consumption patterns, and attitudes toward locally produced food. Information regarding types of local food bought, money spent on local food, and local food attributes was collected. This data was collected using mail surveys, which were distributed to Florida consumers throughout the state. A total of 1,599 responses were received. For simplicity, throughout this report the Local Food Systems in Florida research component will be referred to as Economic Impact.

Local Choice Research Component

The Local Choice research component was conducted to understand consumers' perceptions of local food, which could lead to further development of localized markets. Information regarding consumers' current food purchasing behaviors, their opinions and perceptions of local food, and their familiarity with the Fresh From Florida marketing campaign was collected. This data was collected through a series of ten focus groups, with 93 adult consumers.

FDACS Specialty Crop Block Grant Synthesis Report

Florida MarketMaker (MarketMaker) Research Component

The Florida MarketMaker research component was conducted to investigate how to effectively enhance the use of the online tool Florida MarketMaker among Florida small farm producers and consumers. Research included an in-depth analysis of the current marketing strategies of small farm producers as well as how the Florida MarketMaker website could be updated to enhance both producer and consumer usage. This data was collected through a series of six focus groups with 65 small farm producers. For purpose of simplicity, the Florida MarketMaker research component will be referred to as MarketMaker throughout the report.

Findings

The qualitative analysis for this synthesis report was conducted in two parts. The first analysis included a qualitative comparison of the Local Choice results and the Economic Impact results. These two research components were compared because consumers were the population of interest for each. The second qualitative analysis for this report included a qualitative comparison of the MarketMaker results and the Local choice results, which were both qualitative research components. Therefore, the results for each comparison follow. Quotations from each document are included to provide empirical support.¹

Local Choice & Economic Impact Comparison Findings

Similarities and differences throughout the results were observed as a result of the qualitative comparison of the Local Choice and Economic Impact research components. The findings below detail major themes found throughout the comparison. Quotes from the Local Choice research component are provided, while graphs are provided to detail the responses from the Economic Impact research component.

Similar Findings

The findings that were found to be similar among the Local Choice and Economic Impact results provide valuable insight to understanding consumers' attitudes, perceptions, and perceived value toward local food. The Local Choice research component included a qualitative discussion with consumers about local food, while the Economic Impact research component included a quantitative survey of Florida consumers about local food. Therefore, comparing the results and highlighting the similarities can verify results discovered from both the qualitative and quantitative research components.

Definition of Local Food

In the Local Choice research component, some consumers discussed local food as food grown in a certain area of Florida, while others indicated that local food was all food grown in Florida, or in the Southeastern United States. The broadest discussion of local food by the consumers included grown in the United States. In the Economic Impact research component the results indicated that food grown within a 100-mile radius of the participant's home (28.9%) or food grown in Florida or bordering states (27.3%) was the most consistent definition of local. The following quote and Graph 1 highlight the results from both the Local Choice and Economic Impact research components:

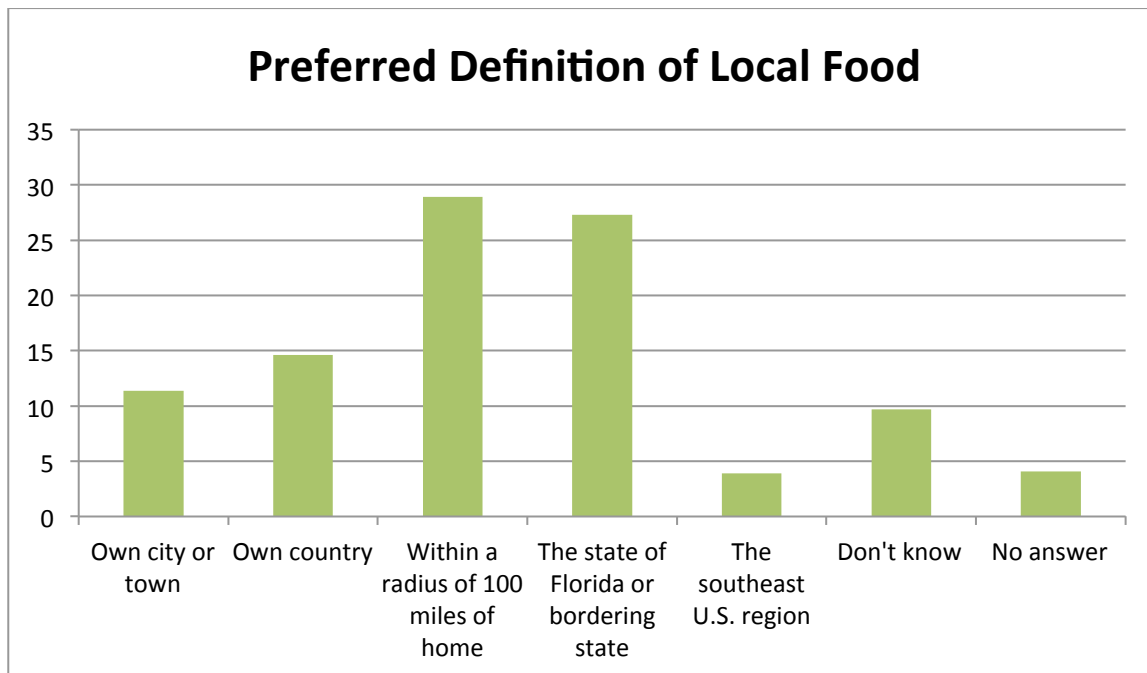
- A participant in the Local Choice research component discussed that local food could come from Florida and the surrounding states. This participant said, "I took the question a little differently. Umm...buying locally to

¹Grammar and punctuation within the quotations appear as transcribed and may therefore not be grammatically correct. This is common practice for focus group methodology to maintain the credibility of the statements.

FDACS Specialty Crop Block Grant Synthesis Report

mean...means you know...I would say even any, if you bought fruits and vegetables and meats anywhere in the state of Florida would be really be considered locally, or even a little bit into Georgia and Alabama, I would consider local. Or at least local enough where I wouldn't mind supporting it."

Graph 1: The graph below displays preferred definitions of local food as reported from the Economic Impact research component. The graph is based on percentage of respondents.

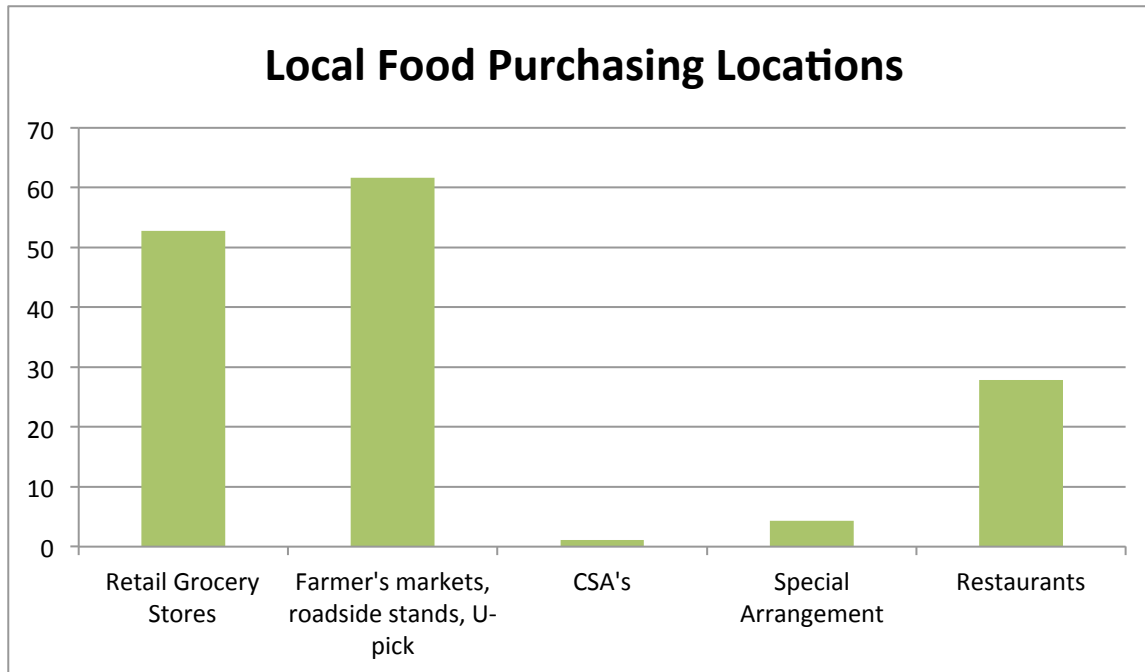


Local Food Purchasing Locations

In the Local Choice research component, the participants discussed buying local food from chain retail grocery stores, local specialty stores, roadside stands/markets, farmers market, directly from farms and CSAs. In addition, some participants indicated that they got local food from their own garden or from a friend or family member. In the Economic Impact research component, the results were very similar, as the participants indicated that they bought food most frequently at farmer's markets, roadside stands, or U-pick operations (61.7%), followed closely by retail grocery stores (52.8%). The following quote and Graph 2 highlight the results from both the Local Choice and Economic Impact research components:

- Two participants in the Local Choice research component discussed the locations where they bought local food. The first participant said, "Well, the farmer's markets or street vendors that you just may see." Another participant discussed buying local food at a local retail store and said, "Tomato Land is one [place to buy local food]."

Graph 2: The graph below displays local food purchasing locations as reported from the Economic Impact research component. The graph is based on percentage of respondents.

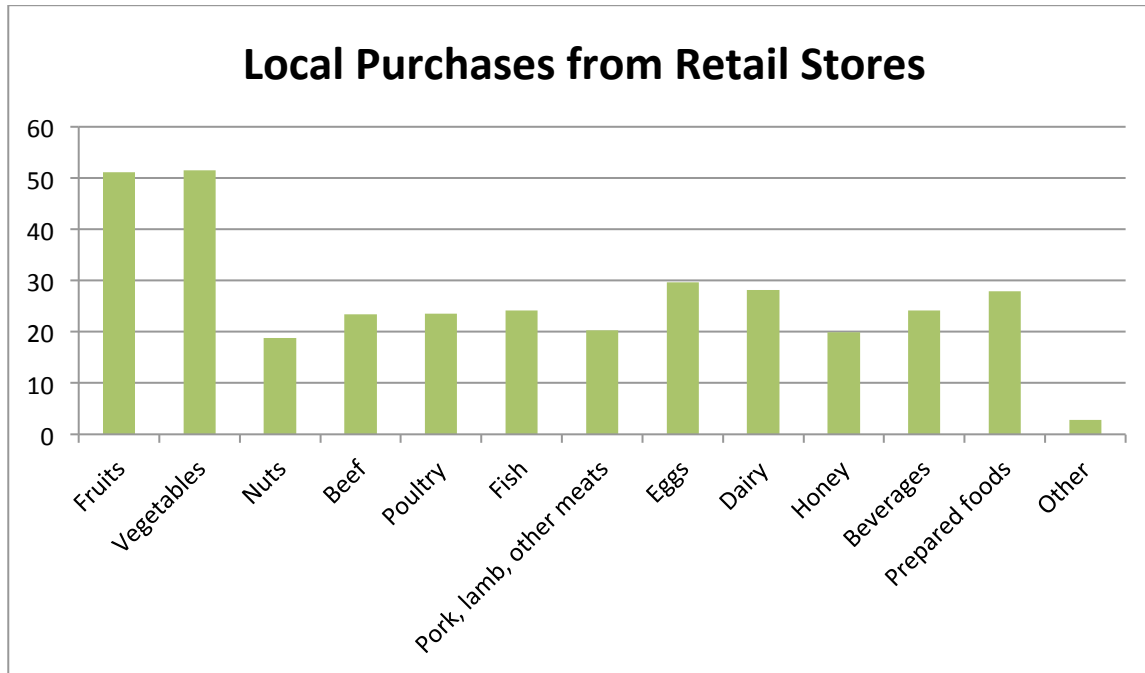


Products Purchased Locally

In the Local Choice research component, the consumers discussed that fruits, vegetables, dairy, seafood, and meats were locally grown foods that were regularly purchased. However, throughout the discussion, most focus and attention was given to locally grown fruits and vegetables. The results from the Economic Impact research component confirm that fruits (51.1%) and vegetables (51.5%) are the common types of locally grown foods purchased on a regular basis. The following quote and Graph 3 highlight the results from both the Local Choice and Economic Impact research components:

- During a discussion in the Local Choice research component, the consumers named several products that were grown locally, many of which were fruits and vegetables. "Oranges," "plant city strawberries," "oranges, lemons, limes," "corn, radishes, bell peppers, lettuce," "tomatoes, avocados," "my mom grows pineapples," "green beans, wheat," "green beans, potatoes," "bananas," "cantaloupes," "carambolas," and "coconuts."

Graph 3: Local food products purchased from retail stores as reported from the Economic Impact research component are displayed in the following graph. Locally grown fruits and vegetables were also the most frequently purchased food products from farmers markets, roadside stand, u-pick operations, CSAs, direct purchases, and restaurants. The graph is based on the percentage of respondents.

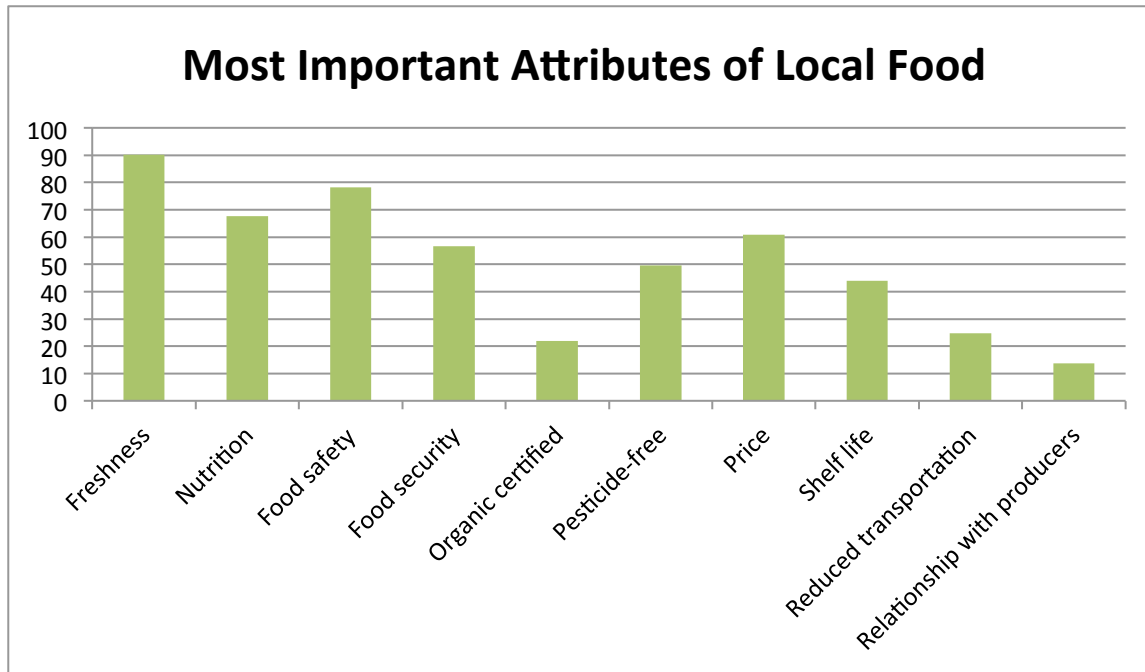


Preferred Attributes of Local Food

In the Local Choice research component, the consumers discussed the attributes of local food that were the most favorable to them, which included freshness, nutritional value, and appearance. Similarly, the results from the Economic Impact research component found that freshness (90.1%), nutrition (67.7%) and food safety (78.2%) were the most important attributes of local food. The following quote and Graph 4 highlight the results from both the Local Choice and the Economic Impact research components:

- Two consumers in the Local Choice research component discussed the favorable attributes that they look for when buying local food. The first participant said, “Any time it looks really fresh to me I’ll buy it.” Another participant said, “I think its nutritional reputation, you know, how nutritional is it, how nutritious is it.”

Graph 4: The attributes that were found to be the most important in the Economic Impact research component are shown in the graph below. The graph is based on the percentage of respondents.

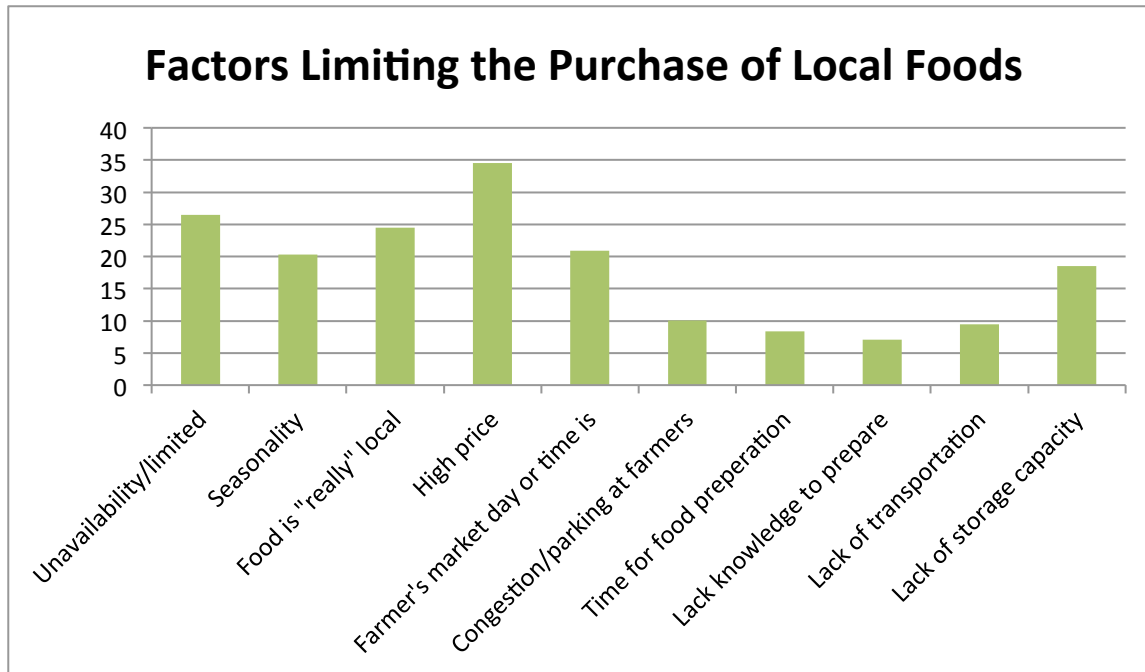


Barriers to Purchasing Local Food

In the Local Choice research component, the consumers discussed barriers to or disadvantages of buying local food. The most common barriers discussed by the participants were price, availability and lack of convenience. Price (34.5%), availability (26.5%) and inconvenience (20.9%) were also identified as some of the most limiting factors to buying local food, as reported in the results from the Economic Impact research component. The following quote and Graph 5 highlight the results from both the Local Choice and the Economic Impact research components:

- Two consumers in the Local Choice research component discussed the cost and availability limitations of local food. The first participant said, “I don’t think you can always like get what you want. Or it doesn’t cover everything. That there is, it’s not a one-stop shopping trip. Usually it’s, you have to go to more than one place. I would say that can add up.” Another participant said, “A little more expensive just because it’s been grown locally.”

Graph 5: The most limiting factors to buying local food as reported in the Economic Impact research component are shown in the graph below. The graph is based on the percentage of respondents.



Trust in Local Food

In the Local Choice research component, the consumers expressed a level of distrust in the local producer because they are not inspected the same as larger producers, they have not proven themselves, and consumers have to take their word on their production practices. Distrust in the local producer was also presented as a concern in the results from the Economic Impact research component. Several of the respondents indicated that the lack of knowing if food labeled as local was trustworthy and actually local (24.5%) was a limiting factor. The following quote and Graph 5 highlight the results from both the Local Choice and the Economic Impact research components:

- A participant in the Local Choice research component discussed the distrust associated with buying local food. This participant said, “You know there’s a perceived freshness, if you’re buying from the local guy five miles down the road. In reality I...I guess with markets the way they work, the guy down the road could have got his stuff in Atlanta, nine hours or ten hours, I don’t know if it makes that much difference. But perception wise, if you think it’s being grown fresh, you think it’s maybe not going to have preservatives in it, but in all reality it probably does, or not preservatives, but pesticides and things like that.”

In the Economic Impact research component, 24.5% of the respondents indicated that not knowing whether food is truthfully labeled as local was a limiting factor that they considered when making decisions about buying local food. Graph 5 displayed in the [“Barriers to local food”](#) theme displays this result along with the other limiting factors identified in the research.

Differential Findings

The one finding that was found to differ among the Local Choice and the Economic Impact results indicates that further research should be done to confirm this finding or that researchers should be careful when interpreting the finding, since it was not confirmed in both the qualitative and quantitative research component. The Local Choice research component included a qualitative discussion with consumers about local food, while the Economic Impact research component included a quantitative survey of Florida consumers about local food.

FDACS Specialty Crop Block Grant Synthesis Report

Relationships with Local Producer

In the Local Choice research component, the consumers discussed that social interactions with local producers were valuable. However, the results from the Economic Impact research component show that the relationship with producers was only valued by a small percentage of consumer respondents (13.8%). The following quote and Graph 4 highlight the results from both the Local Choice and the Economic Impact research components:

- A consumer in the Local Choice research component discussed the value of talking to local producer to learn about their production methods. This participant said, “It takes seven years to establish an organic license, so...a lot of these farms, but they will tell you what their growing practices are...whether they use pesticides or whether they use organic pesticides. They will tell you how they grow it, so it’s...you can at least find out...are you growing these strawberries with toxic pesticides or are you growing them hydroponic? You can ask them questions. I go to King Farms all the time. I know they are not certified organic, but their growing methods are...they will tell you...Shelby will tell you all about it.”

In the Economic Impact research component, only 13.8% of the consumer respondents indicated that relationships with local producers were a valuable attribute of local food. Graph 4 displayed in the [“Preferred attribute of local food”](#) theme displays this result along with the other attributes to local food.

MarketMaker & Local Choice Comparison Findings

When qualitatively comparing the MarketMaker and Local Choice research components, similarities and differences were observed throughout the results. The findings below detail major themes found through the comparison analysis.

Similar Findings

The findings that were found to be similar among the MarketMaker and Local Choice results provide valuable insight to the commonalities among producers and consumers when discussing local food. The MarketMaker research component included producers, while the Local Choice research component included consumers. Therefore, by comparing the results and highlighting the similarities, we can identify areas in which producers and consumers agree as well as identify areas where there is a disconnect between the two audiences.

Social Interaction

Throughout the MarketMaker and the Local Choice research components, the participants discussed the value of social interactions. The producers in the MarketMaker research component discussed that it was important to create and maintain personal relationships with consumers through social interaction and frequent communication. The producers identified the relationship formed through these interactions as leading to loyalty and trust. Similarly, the consumers who participated in the Local Choice research component discussed that they enjoyed the social interactions with farmers when purchasing local food. The consumers found these interactions to be a time to learn from farmers and ask questions about how their food was grown. Therefore, it can be concluded that both producers and consumers value social interactions in a local food environment. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A producer in the MarketMaker research component discussed the trend among consumers of wanting to experience life on the farm and meet a farmer. This producer said, “Being in touch with the farmer is one of the greatest things that is going on right now, these days. Okay? These people are coming out of places and going and

FDACS Specialty Crop Block Grant Synthesis Report

visiting the farmer to see how their food is grown. To see what we do to make it happen and everything. And they are enjoying the heck out of it. They think it is better than Disney World.”

- Listening to farmers was discussed as an advantage to buying local food by a consumer in the Local Choice research component who said, “Well, I find one other advantage and this is me, personally...I actually like the social interaction of speaking to the person I’m buying it from. You get a lot of really neat stories if you just stop and listen to people.”

Purchasing Environment

Both the participants in the MarketMaker and the Local Choice research components discussed the importance of a positive and inviting purchasing environment for local food. The producers who were part of the Market Maker research component agreed that it was important to create a friendly and casual purchasing environment for consumers. These producers discussed providing samples, recipes, and experiences that left consumers with positive thoughts after their purchase. Likewise, the consumers also valued a positive purchasing environment. The consumers discussed a positive purchasing environment as one that was convenient, valued good customer service and always had quality products. As identified by both the consumers and the producers, a positive purchasing environment can enhance the purchasing of local food. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A blueberry farmer in the MarketMaker research component discussed the purchasing environment and experience created at his U-pick operation. This participant stated, “Once everybody is done [picking], we have got a pitcher pump right there. They pump the pitcher pump and rinse their hands. “Oh, my grandmother had one.” The whole thing is...perpetuate being at the farm. When they see the old tractors and the stuff like that, they don’t see the pesticides and the fertilizers and everything else.”
- The customer service interactions with those selling local food led to a positive purchasing environment, as was discussed by a consumer in the Local Choice research component who said, “That is the truth, we have a little meat market here off Orange Avenue, and if you have any problems, he’s just like, “Get an extra pack just because I’m sorry that it wasn’t as right as I make it to be.” He is a little mom and pop, he doesn’t sell anything organic, but you go there and get what you need, and the customer service with...with the local, local people is amazing. You don’t get it from anywhere else. They’re great.”

Need for Advertisement and Marketing

The producers in the MarketMaker research component identified a need to advertise and market their local products. The producers discussed good marketing and advertising, through various routes, as being essential for business success. However, the consumers in the Local Choice research component discussed a need for increased and continued advertising and marketing of local food. When discussing local food, the consumers indicated that they were often not aware if they were purchasing local food and did not know where or when they could purchase local food. However, the consumers stated that if there were abundant advertisements for local food, their food purchasing decisions would be influenced by those advertisements. Therefore, it can be concluded that an opportunity exists for producers to continue to advertise and market their local products through a variety of channels in order to reach consumers. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A participant in the MarketMaker research component offered advice for producers in regard to creating a brand and gaining repeat customers through frequent communication. This participant said, “They have got a newsletter

FDACS Specialty Crop Block Grant Synthesis Report

and they will send that out every month. It may be an e-newsletter, maybe a hard copy, depending on who their clientele is. But, they are constantly putting themselves...they are not dependent on them to go search on the Internet for them.” “They are getting their name out intentionally themselves to whoever they have on a mailing list or an email list or whatever. Because out of sight is out of mind. And if I have got to physically go and look something up...I mean, how many websites do we have on campus? Hundreds of thousands, I am not going to go search everybody’s website. I might go look at [name omitted]’s, if I thought well, he has got something and I want to see what he is doing today, I have worked with him some. Or, I might look at one that [name omitted] has, or somebody else. But I am not going to search the mass jillions of people’s websites. But, if I get your email address and I can send you a little newsletter about once a month, a little thought for the day or something that is timely and whatever...if it’s produce, what is fixing to be harvested; if it is livestock, what is fixing to be marketed...whatever. It gives me a chance to sell myself, sell my brand, to you.”

- A lack of exposure to local food frustrated a consumer who participated in the local choice research component. This participant said, “I think one of the main things is, do...you know? Basically, do they tell you that? And if somebody says, “Oh...this bread was baked at Tulipan Bakery, local right here.” Then I may say, “Oh, you know great, I am going to get it there.” So it’s a matter of just it being exposed [to local food], the fact that it is done here. Would I spend a nickel more because it was done here and not in Georgia? Yeah, I would, I probably would. If it tastes good, just as good, yes.”

Prevalence of Media

The producers in the MarketMaker research component, as well as the consumers in the Local Choice research component discussed the prevalence and influence of media in the lives of today’s consumer. The producers in the MarketMaker research component discussed that it was becoming more important for them to maintain an online presence in order to connect with their consumer base. However, the producers also discussed that they may have to use a variety of media outlets to connect with consumers from different generations. The consumers in the Local Choice research component discussed the influence of media in their lives. Some of the consumer participants discussed specific instances when media had negatively influenced their perceptions of the food industry. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A producer, participating in the MarketMaker research component, discussed the need to have an online presence. This participant said, “And a web presence is almost mandatory now. If you have absolutely nothing on the web, you’re kind of sunk.”
- A consumer in the Local Choice research component discussed the negative influence a news story had on his or her perceptions. This participant said, “I’m afraid I have a bad connotation with this, we were talking during the break and I mentioned I saw an item on the news a couple months ago about how they reconstitute ‘not from concentrate’ orange juice that you buy in the bottle. Where they take orange juice out of a tank that’s lost its flavor and they re-inject orange juice flavor that they squeezed out of the rinds.”

Lack of Knowledge

Both the participants in the MarketMaker and the Local Choice research components discussed the lack of knowledge they had regarding a topic of discussion. The producers expressed that they were not knowledgeable or aware of the Florida MarketMaker marketing tool for local products. In an activity designed to expose consumers in the Local Choice research component to locally grown fruits and vegetables in Florida, several of the participants indicated that they did not

FDACS Specialty Crop Block Grant Synthesis Report

know that some of those products were grown in Florida. The consumers pointed out their lack of knowledge about local food throughout the Local Choice focus groups. Therefore, the opportunity exists to continue to educate both consumers and producers on local food opportunities and topics. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- In reference to being aware and knowledgeable of local food marketing opportunities, a producer discussed the overall lack of awareness of Florida MarketMaker among himself, other producers, and consumers. This participant said, “It is as though they put the program together and they are keeping it a secret, you know? And because of it, I ask customers constantly when they come in, “Tell me where you found out about us from, MarketMaker or who?” And MarketMaker is the new one on the block. And I thought, well, with the state backing it, it is something that we could really use. Nobody knows that it exists. I mean, I will actually sit there and take a sheet and brought it up on the computer with a website on it and give it to customers as they come in and say, “Hey, go looking for this.”
- In the Local Choice research component, a consumer discussed his or her personal lack of knowledge regarding food products grown in Florida. This participant said, “I think, definitely, it is not really like a comment about anything, but the little cards with all the fruits and vegetables that we did, I kind of wish that I had that somewhere available that I could know where it is. Because I didn’t know that some of those things were grown in Florida, had no idea.”

Need for Education

The need to educate consumers about local food and food production was discussed by participants in both the MarketMaker and Local Choice research components. Some of the producers in the MarketMaker research component discussed the need to educate consumers and several producers shared stories about how they try to educate the consumers that they come in contact with. Additionally, the consumers in the Local Choice research component shared stories about the need for their own education, but more importantly the education of today’s youth about local food and where their food comes from. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- In the MarketMaker research component, a producer discussed how he and his wife try to educate their consumers about the production process and quality of the products they sell. This participant said, “We do the little things that you are talking about, the farmer’s market. But we are starting out, my wife and I. I have been doing farmer’s markets for ten years, but it has always been a part-time deal, because I always had a full-time job. This is the first year where it is our only income and we are now committed to doing it full-time. So, we are trying to expand our farm. So, we’ve...we are grateful for the farmer’s markets, but everything you say...you work so hard and get a rainout or something, it is a huge disappointment. Of course, we are dealing with a very conventional product, citrus. So, how do you make it different from a Costco? And we are not completely organic either, at this point. We haven’t transitioned yet. So, we tell people what we are and how we grow it and why it is a good product. And we do less than 24 hours off the tree, is generally almost always our principle or practice that we follow. Sometimes we do 48 hours off the tree.”
- In the Local Choice research component, two consumers discussed the need for education about local food, particularly the need to educate children. The first participant said, “I’m just going to say I think it’s probably more important that we just educate our youth more on local food growth. Because it starts at, you know, it’s a learned behavior you know, what you eat and how you eat. And so what you learn, you teach your children or you

FDACS Specialty Crop Block Grant Synthesis Report

teach the youth. So advertising and educating, I think, is the most important in getting the local market more, you know, attractive.” Another consumer discussed a specific example of a need for more education about agriculture and food production when she said, “My neighbor who is in third grade, passed his FCAT...argued with me, I handed him a carrot out of our garden and he says, “I don’t eat carrots that grew in the dirt.” [laughter] I said, “Oh, I will take the dirt off.” He looked at me. I said, “Okay, I will wash it.” So, I washed it for him and handed it to him. He said, “No, I am serious, I don’t eat carrots that grow in the dirt.” I said, “Well, do you eat carrots?” He goes, “Yeah, everybody eats carrots.” I said, “Where were your carrots from?” He said, “Publix.”

Quality Products

In both the MarketMaker and Local Choice research components, the participants discussed the importance of quality food products. The producers in the MarketMaker research component indicated that it was important for them to provide samples of their products to consumers, so that consumers could experience the quality of their products before purchasing. Similarly, the consumers in the Local Choice research component indicated that they were looking to buy food that was high quality. Therefore, both producers and consumers agree that the production and consumption of quality food is important. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- Producers in the MarketMaker research component agreed that it was beneficial to provide samples of products when possible so consumers could witness the quality of the product first-hand. One producer discussed the importance of providing samples and said, “Yeah, samples are worth a million bucks.” Another producer reiterated the same idea and said, “\$3.50 a pound, I sell them right across the sidewalk from somebody who is selling them for a buck and a half. And the slices are out on the table and when you have them face to face, it is all about the samples.”
- A consumer in the Local Choice research component discussed several quality indicators and indicated that these attributes were especially important when buying produce. This participant said, “For produce and things, I look for freshness, I look for crispness. Like with broccoli sometimes, like the organic broccoli will be rubbery because it is not that fresh. So, sometimes I will even choose conventional over it, depending on how fresh it is. I also look for it being...if it’s local, if you can find it local...I mean, here in Florida you get a lot of local produce, so that is great if you can find it because then you know it was picked at the peak of ripeness. That is always the best.”

Logistical Dilemmas

Access and convenience play a major role in the sale of local food. The participants in both the MarketMaker and Local Choice research components discussed this problem. Some producers in the MarketMaker research component discussed that their operations were not positioned near an urban area where a large majority of consumers are present to purchase their products. The consumers in the Local Choice research component indicated that it was often inconvenient to go to markets out of their way or to markets that had limited hours of operation. Through the discussion, it was evident that both producers and consumers agreed that access and convenience to purchasing can be prohibiting to the sale of local food. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- Two producers who participated in the MarketMaker research component mentioned that the location of their farms was a large hindrance to their sales. This participant said, “The biggest thing that we ran into was logistics. And logistics alone is almost shutting us down before we even get going.” Another participant discussed the same

FDACS Specialty Crop Block Grant Synthesis Report

problem as a result of living in a rural area. In a disappointing tone the participant said, “And that’s our biggest concern is...you know, the niche market is there, but I live in Jackson County and as you know, we’re in the middle of nowhere. [laughter] And that’s, that’s where our marketing...we have some ups and downs, it’s never gonna be a complete perfect circle, it’s gonna be an oval or an egg, but trying to get it better.”

- The convenience of shopping at a grocery store, rather than at inconvenient local food markets, was discussed by a participant who said, “I agree with the inconvenience thing, just cause it’s easier to you know if you’re in a store, it’s just easier to get everything you need to get than to continue traveling to try to find the local stuff.”

Differential Findings

The findings that were found to differ between the MarketMaker and Local Choice results provide valuable insight to the gap that exists between producers and consumers, particularly surrounding the topic of local food. Therefore, by comparing the results and highlighting the differences we can identify areas in which producers and consumers disagree and work toward creating solutions to bridge the gap between producers and consumers.

Local Food Movement

In both the MarketMaker and the Local Choice research components, the participants discussed the local food movement. However, the participants’ perceptions of the local food movement differed between the two groups. The producers in the MarketMaker research component discussed that the local food movement was increasing. These producers also identified that an opportunity existed to target consumers taking part in a local food movement. However, some of the consumers participating in the Local Choice research component indicated that the local food movement was almost non-existent, while others indicated that the movement was trendy or expanding. Consumers indicated that the local food movement was stronger in certain parts of the state than in others parts. In addition, the consumers in the Local Choice research component discussed that local food was important, but they rarely made a conscious effort to go out of there way to buy or even support locally-grown food. Therefore, the results indicate that consumers may not perceive much of a concerted local food advocacy movement or be willing to put forth extra effort to buy local food. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- Two producers in the MarketMaker research component discussed the local movement. The first participant said, “It feels like it’s becoming more of a mainstream idea to buy local food in general.” Another producer responded and said, “Well, and I guess that’s why I was asking about a particular community, because I get the impression that there’s an increasing number of people who value locally.”
- Two consumers participating in the Local Choice research component discussed their take on the local food movement. One participant discussed his or her perceived fragmentation of the movement and said, “I find it a bit fragmented...in terms of, you’ve got various things going on to promote eating locally, buying locally, but they’re not, there is not a real cohesive push. There’s like a little bit here, a little bit there, and if you could just bring it more together and have a better, I want to say, a better marketing push, more of a cohesive campaign, I think that could make things really grow. Make them hop. Get people more aware and involved.” Another consumer stated that buying local was not a priority. This participant said, “I would like to say buying, I would like to make it more of a priority, but I don’t. So I think my actions dictate the fact that it probably is not as important to me as I would like to think it is. [agreement heard] If it’s an option for me and it happens to be there, like I do like to go the farmer’s market and I do know they are, for the most, part local outside of the fish that I’m getting from Maine,

FDACS Specialty Crop Block Grant Synthesis Report

occasionally. But, you know, I know that those are local, I like doing what I can, but outside of that I probably don't make the time to do it, it's not a...as you pointed out, it's not a choice that I do."

Product Preference

The participants in the MarketMaker and Local Choice research components also disagreed on the importance of niche products. The producers placed a significant amount of emphasis on growing and providing a niche product or something that is unique to consumers. However, the consumers discussed looking for more standard, common, and convenient food products. These results indicate that producers may find more value in producing standard products that are wanted by consumers. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A producer in the MarketMaker research component discussed growing a niche product to avoid competition. This participant said, "And I have figured out that, that has got to be my niche is to grow what they can't grow."
- Two consumers in the Local Choice research component discussed the types of foods that they commonly buy. The first participant said, "My husband does a lot of the shopping, he has a more flexible schedule so he can go when it's not Saturday. And we have sort of a dichotomy of foods, he and I are trying to eat more healthy and lower fat and trying to lose weight. And the kids, we end up buying them stuff that we wouldn't eat, so like convenience foods and macaroni and cheese and chips. [laughter from other participants]" Another participant said, "Meats, vegetables, and fruits, and desserts. [laughter from other participants]"

Government Regulations

The participants in the MarketMaker and Local Choice research components did not agree on the amount of regulations that should be placed on food production. The producers in the MarketMaker research component discussed rules and stringent guidelines as a primary contributing factor that inhibited the sale of local food. On the opposing side, the consumers in the Local Choice research component demanded increased regulations for small farm production to ensure the safety of food coming from these operations. The consumers indicated that they need to know whether or not their food met regulations and if it was produced and prepared in a safe manner. This finding suggests that consumers are looking for transparency in food production practices to insure food safety while producers feel regulation inhibit rather than protect. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A producer in the MarketMaker research component discussed the problems with strict rules and regulations by the government and said, "Yeah, we find the laws to be highly prohibitive to being successful in Florida."
- A consumer in the Local Choice research component discussed his or her skepticism associated with beef production and the need to know that regulations are being followed. This participant said, "Because you read so much and you see so much going on...on the news and people are not sticking with the regulations. They're just producing stuff and trying to push the stuff out and sell the stuff and some people are taking short cuts and one of the things that lured me away from the beef was you hear all the talk about the E. coli and the shortcuts and seeing the horrible ads on the television...how they doing the calves, and you know, just slaughtering the meat so you want to know that the food is...the regulations are right and it's not speed grown, you know? Certain foods, I have got to where I look at where it came from."

FDACS Specialty Crop Block Grant Synthesis Report

Trust of the Local Producer

Trust in the safety and wholesomeness of locally grown products differed among those who participated in the MarketMaker and Local Choice research components. The producers in the MarketMaker research component tended to believe that locally grown products were safer. Additionally, as producers these participants personally valued providing consumers with a safe product. The consumers in the Local Choice research component discussed they trust the products coming from large producers over products coming from small producers because a middleman controls and maintains the quality and safety of products coming from large producers. As a result, consumers may not be attributing as much trust to small producers as previously thought. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A producer in the MarketMaker research component who worked to build trust with consumers through a farm tour said, “One of the biggest things actually that helped me, which goes along with the people that know you are a farmer type thing, was a New Leaf Market tour. That has made the difference. People come out to the farm, they see the animals, they know how they are raised, they see just how things look. And people like to deal with people that they feel like they know or they trust. Well, this is my farmer, basically. To these loyal customers, you are their farmer. And they feel very proud of that. And I don’t care how low the price would go at Walmart, they are still going to go to [name omitted]. But that personal attention of being able to come to your location or your farm, really makes a big difference. And I think that was the turnaround for us.”
- A consumer in the Local Choice research component discussed the unknowns associated with buying local food, as well as his or her uneasiness and lack of trust. This participant said, “If you’re not used to frequenting farmer’s markets or, you know, fruit stands and stuff like that you know, you’re kind of leery of...what am I gonna get? You know? If you go to a grocery store, you kind of know, yeah there’s some preservatives and stuff on top of it, but I know I’m gonna get a product that I can eat, whereas if you buy just from somebody, and you’re like, is this gonna be good for me? It looks good, but am I gonna get sick from this?”

Environmental Benefits

The consumers in the Local Choice research component discussed the benefit that local food provided to the environment, while the producers in the MarketMaker research component did not discuss the environmental benefits of local food. Throughout the Local Choice discussion, it was apparent that a significant number of consumers valued supporting the environment and all things associated with “going green.” Some of these consumers were even willing to pay premium prices for products associated with the “green movement.” However, while some producers in the MarketMaker research component emphasized the value of organic products and the premiums that accompany said products, a small amount of producers focused on the value of providing products that targeted consumers with an interest in the environment. Instead, producers focused more on providing quality products of a wide variety. The following quotes are examples of discussion from both the MarketMaker and Local Choice research components that represent this theme:

- A producer in the MarketMaker research component discussed several valued attributes of food products, but neglected to touch on the environmental benefits of some food products. This participant said, “And now being organic, being local, being small farmer; those are so big marketing tools right now.”
- A consumer in the Local Choice research component who was concerned with her carbon footprint said less waste was produced when one purchases local food. This participant said, “Yes, if you choose to [buy local] [laughter].”

You aren't contributing to the landfill with the plastic containers and the binders and everything that some food comes in.”

Implications

The results of the MarketMaker, Local Choice, and the Economic Impact research components provide valuable insight to understanding the current state and future potential of the local food system in Florida. Implications for the Local Choice and the Economic Impact comparison, as well as the MarketMaker and Local Choice comparison are provided below.

Local Choice and Economic Impact Comparison Implications

From the comparison of the Local Choice and Economic Impact research components several similar and one differential finding emerged. These comparative findings provide valuable insight to local food topics, which were discussed qualitatively and confirmed quantitatively by consumers. The following implications have been interpreted from the results.

- Consumers identified Farmers' markets, U-pick operations, roadside stands, and retail grocery stores as places where they commonly buy local food. Increasing advertising of local food at these locations, as well as the prevalence of local food at retail grocery stores provides an opportunity to further promote and market local food.
- The definition of local food varies among consumers from a small, localized area to the entire United States. Food grown in Florida was found to have value to consumers in both research components. Therefore, an opportunity exists to label products with the production location. Even when food is being shipped outside of Florida, the results indicate that consumers find value if it is food that is produced in the United States rather than another country.
- Consumers' views of local food are centralized around local fruit and vegetables. Increasing awareness and marketing of other local food products, could provide an opportunity for producers, one on which they and the local food movement, as a whole, could capitalize.
- Health and quality attributes were found to be the most favorable attributes of local food in both research components. Focusing on these attributes and including these attributes in communication messages may be valuable in attracting and retaining consumer interest in local food.
- Convenience, price and availability were discussed by consumers in both research components as being the top limiting factors in the purchase of local food. Alternative markets and collaborations with distributors and retailers may provide an opportunity for producers to work toward making local products more convenient and available. Additionally, the research suggested that although price was a limiting factor, many consumers would be willing to pay a higher price for local food if it was high quality and convenient.
- Consumers in both research components discussed trust in local food. Trust in the quality and safety of local food was discussed, as well as trust that food labeled as local was actually local. Through transparent communication practices, as well as social interactions and relationship building efforts, producers could make progress in addressing these areas of distrust among consumers.
- Social interactions were found to be valuable to the consumers participating in the Local Choice research component. However, a small percentage of consumers in the Economic Impact research component reported that they valued the relationship with producers. Although a difference was found in this comparison, relationships and social interactions should continue to be valued by producers as these actions will lead to increased trust among consumers. Additionally, this difference may be due to the difference of presentation in the

FDACS Specialty Crop Block Grant Synthesis Report

research components, as relationship with producers was discussed as an advantage of local food in the Local Choice research component, but in the Economic Impact research component, relationship with producers was discussed as an attribute of local food.

MarketMaker and Local Choice Comparison Implications

From the comparison of the MarketMaker and Local Choice research components several similar and differential findings emerged. These comparative findings provide valuable insight to local food topics, on which producers and consumers agree. In addition, the findings also provide valuable insight into local food topics on which consumers and producers disagree. The following implications have been interpreted from the results.

- An opportunity exists to capitalize on the social interactions between producers and consumers that can naturally occur as a result of buying local food. Both producers and consumers indicated that they valued these social interactions. In addition, increased positive social interactions might provide some influence on consumers to begin to develop higher levels of trust in the local producer.
- A positive purchasing environment was important to both producers and consumers. However, producers may be able to further improve the purchasing environment for their consumers. While the producers discussed creating a positive purchasing environment by providing samples, recipes, and positive experiences, the consumers also valued an environment that was convenient, had good customer service and quality products. By focusing on convenience, customer service and quality products, producers may be able to create a more positive purchasing environment, which may lead to an increase in loyal customers.
- Both the producers and consumers identified the need for improved advertising and marketing. Therefore, an opportunity exists to solidify a local food brand and accompany that brand with a comprehensive advertising and marketing plan.
- Both the producers and consumers discussed the prevalence and influence of media in the lives of today's consumer. The producers recognized the need to reach their target audiences through a variety of media channels. However, the consumers discussed that media does influence their perceptions of food topics. Understanding the media channels used by target audiences, as well as the influence of other communication or media outlets on consumer opinions, is valuable in improving and targeting communication about local food.
- Both producers and consumers discussed a lack of knowledge they had concerning the topic of local food. The producers discussed a lack of knowledge regarding MarketMaker, a marketing tool for local food, while the consumers discussed a lack of knowledge regarding the types of food products locally grown or produced in Florida. Therefore, the opportunity exists for the industry and public sector collaborators to develop efforts to continue to educate their own producers on new technologies or trends, as well as the opportunity to develop initiatives to increase consumer knowledge and awareness of local food topics.
- The need to educate consumers about local food and food production was discussed by both producers and consumers. The opportunity exists for local producers to educate consumers about local food through communication. Additionally, the opportunity exists for private/public sector agriculture to develop education initiatives aimed at reconnecting consumers and the youth of today to local food and food production.
- Consumers and producers valued quality food products. An opportunity exists for producers to continually communicate to consumers about the quality of their food products. However, producers should be careful to accurately communicate about the quality of their products to avoid harming the credibility of the industry as a whole.

FDACS Specialty Crop Block Grant Synthesis Report

- Access and convenience to local food were discussed as logistical dilemmas that prohibit the advancement and purchase of local food. Producers discussed barriers to reaching a large consumer base with their products, while consumers discussed inconveniences that often accompanied the accessing of local food. An opportunity exists for producers to explore alternative markets to distribute their local food products. However, the opportunity also exists for producers, distributors, and retailers to work together in order to increase the availability of local food at convenient retail stores frequently visited by consumers.
- The consumers and producers had different opinions about the current state of the local food movement. Producers felt that the local food movement was increasing, while consumers felt that the local food movement was not increasing in all areas and may even be almost non-existent in some areas. Producers should work to consistently communicate with consumers about their perceptions of local food and the local food movement. By doing this, producers will be able to better understand the perspective of consumers, as well as identify opportunities to build their relationship with consumers. Additionally, an opportunity exists for the industry to make local food more available throughout the state.
- While producers felt providing a niche product, that was unique to consumers, would be beneficial, consumers preferred a product that was standard, common and convenient. The focus on niche products by producers may have also been influenced by competition. However, through increased access to consumers, producers may be able to benefit more from the production of standard and conventional products, as the average consumer prefers these products.
- The producers and consumers held different views of government regulations. Consumers valued government regulations and they wanted to know that the safety of their food was being held to a consistent and high standard. The restrictions of government regulations caused producers to view regulations as prohibitive. An opportunity exists for the industry to collaboratively work to shape government policy to create standards that are suitable for both large and small producers. To increase trust among consumers, particularly concerning small farm production, producers will need to increase and demonstrate to consumers that they do value and follow government regulations.
- Trust in local food products brought about a difference of opinions among the producers and consumers. While producers felt that they produced a high quality and safe product that could be trusted, consumers felt they could not trust the products coming from small local producers, because the product was not being controlled and maintained by a middle man to ensure quality and safety. By communicating to consumers about the processes and steps taken to ensure that a safe and high quality, local product is delivered, producers may be able to enhance consumer trust in their local product.
- The consumers discussed environmental benefits of producing, buying and eating local food. However, producers did not discuss the environmental benefits of their local food products. An opportunity exists for producers to communicate and highlight ways in which their practices benefit the environment.

Recommendations

Based on the comparison results of the MarketMaker, Local Choice and Economic Impact research components several recommendations have been developed. General recommendations, pertaining to the sale and promotion of local food, as well as specific recommendations for both large and small-scale producers are included.

General Recommendations

These research-based recommendations present broad issues or topics that, based on this research, may need to be thought about or discussed by a large majority of the industry. In addition, to fulfill some of these recommendations, further research may be required.

- The industry should work to promote and strengthen a local food brand through both large and small producers. This research shows that consumers find value in a local brand “from Florida” and “grown locally.” By using a consistent and recognizable brand the overall value of local food in Florida is likely to increase. It is recognized that the Fresh From Florida brand currently exists for local food in Florida. Additional promotion and strengthening of this existing brand may be an avenue to explore.
- Industry communicators should constantly assess how the media is influencing consumer opinions regarding local food. In addition, they should work to influence and shape public opinion about local food. Based on these findings, training should be developed to increase capacity among both small and large producers to understand how to communicate effectively and be understood by consumers.
- Research-based extension and outreach efforts should continue to educate producers on new technologies and trends, as well as develop initiatives to increase consumer knowledge and awareness about local food.
- Based on the fact that consumers value convenience when making food purchases, collaborative efforts should be formed between producers, distributors and retailers to increase the availability of local food in retail grocery stores.
- Education initiatives aimed at reconnecting consumers and the youth of today with local food and food production should be developed.
- As observed in the research, local food availability varies throughout the state as a result of both the inability of some products to grow in certain geographical locations as well as producers’ inability to reach all consumers. The industry should work together to make local food more available throughout Florida.
- Benefit lies in a collaborative effort among industry stakeholders to shape government policies regarding food production and safety for both large and small-scale producers. While research findings suggest that small-scale producers want to reduce the amount of regulations, consumers place value in the quality and safety of food that they perceive regulations to ensure.

Recommendations for Small-Scale Producers

The results of these research components provide many opportunities for small-scale producers to increase their sale of local food and improve their overall brand. As a result, the following short, medium and long-term recommendations have been made. It is intended that all recommendations should be long lasting; however, some recommendations could begin to be fulfilled within a shorter time span than others.

Short-Term Recommendations – Immediate

These recommendations provide immediate opportunities for small-scale producers to begin improving their local food brand. Small-scale producers should set short-term goals to implement these recommendations.

- Small-scale producers should become regularly involved in conversations and social interactions with their consumers. To determine the best communication channel to communicate through, producers should analyze and understand their target audience(s). Producers should keep in mind that to maintain these relationships,

FDACS Specialty Crop Block Grant Synthesis Report

communication via several channels might be required (e.g. face-to-face, online and/or print mailings, social media).

- In order to communicate effectively with consumers about local food, small-scale producers should include favorable attributes of local food in their communication messages. Because consumers value these attributes, it is likely that they will be attracted to and respond in a positive manner to the communication message. However, based on research, it is crucial that all attributes discussed in communication be accurate representations of the products being marketed. This is to avoid jeopardizing trust between the producer and consumer.
- Small-scale producers should emphasize the environmental benefits of producing, buying and consuming local food in their communication messages. Consumers identify with these environmental benefits and therefore, will likely attend to and respond to messages including said benefits.
- To increase awareness of local food availability, small-scale producers should improve the advertising and marketing of their local food products.
- Instead of focusing on the negative impact of regulations, producers should recognize the value placed on regulations by consumers. In turn, producers should communicate their compliance with these regulations to increase consumer trust and confidence in their products.

Medium-Term Recommendations – 1-5 years

These recommendations provide opportunities for small-scale producers to improve their local food brand. However, the implementation of these recommendations is expected to take one to five years. Small-scale producers should consider including these recommendations as goals in their five-year plan.

- Emphasis on creating a positive purchasing environment should be made by small-scale producers. The core of a positive purchasing environment should include convenience, quality products and good customer service.
- Small-scale producers should develop a personal brand for their local products. Through successful creation and management of a brand, research has shown that consumers are likely to recognize and become loyal to the brand.
- Producers should recognize that an opportunity exists not only to produce niche products, but also standard, less differentiated products. This recommendation is based on the research findings that show consumers prefer such products.

Long-Term Recommendations – 5-10 years

This recommendation has the potential to improve the local brand and success of a small-scale producer's product. Implementation of this recommendation may take several years. Therefore, small-scale producers should consider addressing this recommendation through long-term goals.

- Because consumers find some traditional local food outlets to be inconvenient, small-scale producers should work to identify alternative markets that provide accessibility and convenience to the consumer. This may require collaboration with other producers in order to continue to achieve a desired return-on-investment.

Recommendations for Large-Scale Producers

The results of these research components provide many opportunities for large-scale producers to capitalize on the sale of local food as well as strengthen their local brand. As a result, the following short-term recommendations have been made.

FDACS Specialty Crop Block Grant Synthesis Report

Short-Term Recommendations – Immediate

These recommendations provide immediate opportunities for large-scale producers to begin improving their local food brand. Large-scale producers should set short-term goals to implement these recommendations.

- Large-scale producers should continue to focus on building relationships and becoming more socially involved with their target consumers and local citizens. These actions should be based on transparent communication and may include a media presence. Even in instances where market locations may be outside of the local area, building local relationships can be valuable, based on consumers' ability to define local food as from Florida, from the southeast, and even from the United States.
- In order to communicate effectively with consumers about local food, large-scale producers should include favorable attributes of local food in their communication messages. Because consumers value these attributes, it is likely that they will be attracted to and respond in a positive manner to the communication message. However, based on research, it is crucial that all attributes discussed in communication are accurate representations of the products being marketed. This is to avoid jeopardizing trust between the producer and consumer.
- A need exists to increase the advertising and marketing of local food. Therefore, large-scale producers should showcase their US grown products in a comprehensive advertising/PR campaign.
- Large-scale producers should emphasize the environmental benefits of producing, buying and consuming local food in their communication messages. Consumers identify with these environmental benefits and therefore, will likely attend to and respond to messages including said benefits.
- Large-scale producers should take advantage of the value that consumers place on locally grown food. Regardless of the end market, producers should consider the value of labeling food with a Fresh From Florida label or, at a minimum, a grown in the USA label.
- Research findings indicate that consumers are more trusting in food products marketed through large, retail outlets, due to their knowledge of regulatory requirements. Therefore, large-scale producers should continue to emphasize the regulations in place to ensure consumers the safety and quality of their food as a positive brand attribute.

Conclusion

The Economic Impact, Local Choice and MarketMaker research components provide a comprehensive look at the current local food market in Florida. Through this comparative synthesis, commonalities and differences throughout the research components have been identified. By understanding these commonalities and differences, the local food industry can work to capitalize on the commonalities as well as strengthen the areas where differences exist. The recommendations created as a result of the comparison provide valuable opportunities for the industry, small-producers and large-producers to strengthen and expand the production of local food in the state of Florida.