MAINE FOOD STRATEGY

CONSUMER SURVEY REPORT

MAY 2014

THE MAINE FOOD STRATEGY

Acknowledgments

Thanks to the volunteer *Maine Food Strategy Research Committee* for providing guidance and review for this report.

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The Maine Food Strategy
2014 Consumer Survey Report

Introduction

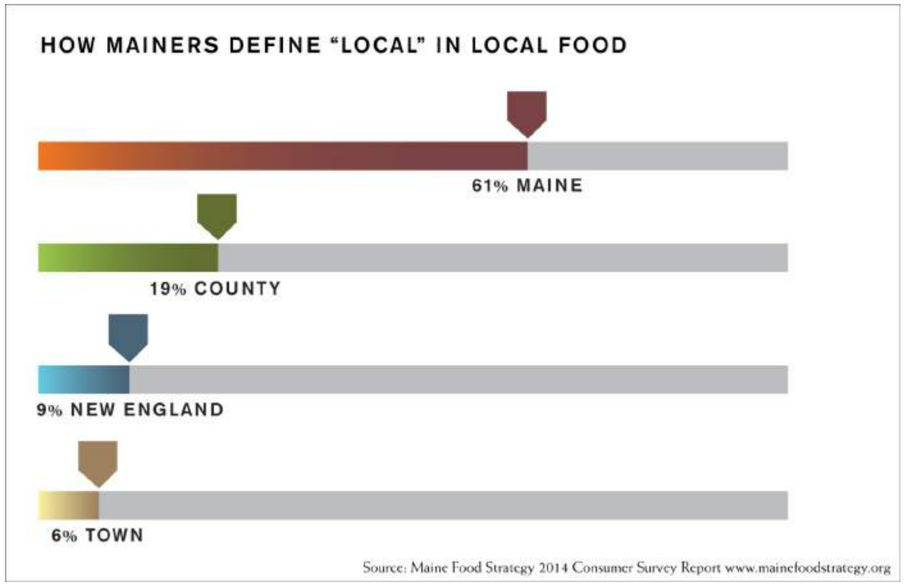
In the late summer and early fall of 2013, the Maine Food Strategy undertook a telephone survey of approximately 600 Maine households to determine how Mainers understood the state's food system and find out how they viewed various food-related issues.

The survey was conducted by the Survey Research Center of the Edmund S. Muskie School of Public Service at University of Southern Maine (USM). The questionnaire for the survey was developed in tandem between the staff of the Survey Research Center and the Maine Food Strategy's Research Committee.

An equal number of households with land lines and mobile phones were contacted and the 83-item survey took approximately 15-20 minutes to complete. This was a state-wide survey and the number of households contacted in each county reflected the percentage of that county's population relative to the entire state's population. For example, more than 6.3% of the households contacted were located in Aroostook County because that represents the percentage of Maine's population that lives in that county. Demographic data – gender, household income, self-reported health status, etc. – were gathered and have helped to understand better the responses to the questions posed.

What Does Local Mean?

Respondents were asked what "local food" meant to them. The options presented for local food grown or produced included "in town, county, Maine, New England, or what?" Sixty-one percent (61%) responded "Maine."



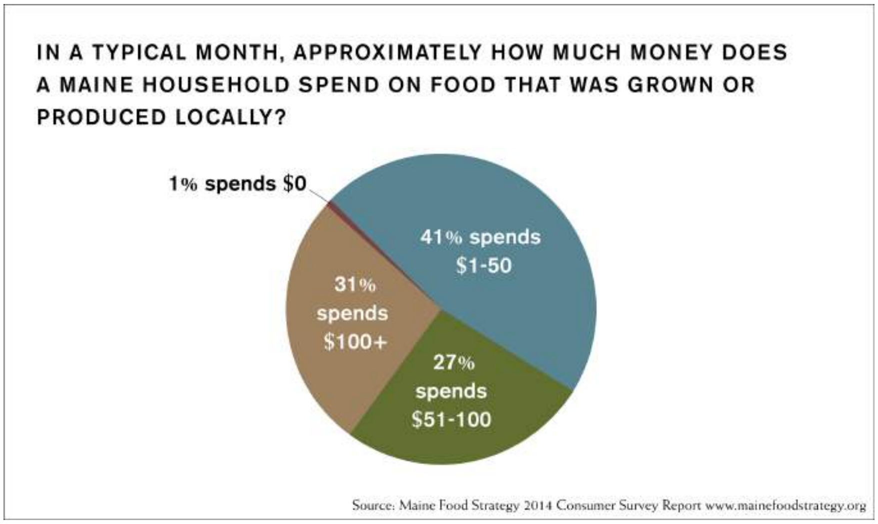
When given the choice of buying Maine-grown/raised/caught food or food from "somewhere else," almost 80% chose to purchase local or Maine food. Nearly two-thirds of all respondents (64%) said they did so to "support local farmers/fishermen/businesses." "Freshness" was also cited (38%) as a rationale, as were "better taste," and, "know where it comes from."

> **"GIVEN THE CHOICE OF BUYING FOOD OR FISH GROWN, RAISED OR CAUGHT IN MAINE, OR FROM 'SOMEWHERE ELSE,' ALMOST 80% CHOSE TO PURCHASE LOCAL OR MAINE FOOD."**
>
> **"TWO-THIRDS OF ALL MAINE HOUSEHOLDS SAID THEY PURCHASE LOCAL FOOD TO SUPPORT FARMERS, FISHERMEN AND BUSINESSES."**
>
> Source: Maine Food Strategy 2014 Consumer Survey Report www.mainefoodstrategy.org

When asked "what percentage of all food you bought in the last three months was grown or produced locally," over one-third (39%) purchased between 10-25% of their food locally, while 9% purchased over half from local sources. Determinants of local food purchases included "money circulating in the local economy" (71%); "cost" (54%); and """distance you have travel to get local food" (50%).

Mainers, Their Food Choices and Buying Habits

In a typical month, 41% of Mainers said they spend between $1-$50 on food grown or produced locally and 31% spend more than $100 a month.



In terms of the food Mainers purchase, “freshness,” “flavor” and “nutrition” were top priorities for 85% or more of respondents, with more than 90% rating “freshness” as a primary criterion, followed by “flavor” (87%) and “nutrition” (85%).

“Cost” was considered an important factor by seventy percent (70%) of respondents, closely followed by “humanely raised” (65%). Other interesting findings included “antibiotic / hormone free” as an important consideration for over fifty percent (57%) of households, and more than a third (39%) rated Genetically-modified-organism-(GMO)-free as an important factor. “Certified organic” was significant for 26% of households.

WHAT ARE THE FACTORS THAT INFLUENCE MAINERS WHEN BUYING FOOD?

93%	Freshness	57%	Antibiotic / hormone free
87%	Flavor	48%	Fair trade
85%	Nutrition	44%	Knowing producer / fisherman*
70%	Cost	39%	GMO free
65%	Humanely raised	34%	Easy to prepare
60%	Local	26%	Certified organic

*Fisherman includes lobsterman

Source: Maine Food Strategy 2014 Consumer Survey Report www.mainefoodstrategy.org

Reasons Why Maine Households Do Not Purchase More Locally Raised, Grown and Caught Foods

The Maine Food Strategy is interested in information on consumer food preferences. Households were asked to cite reasons why they don't buy more Maine food. Respondents frequently mentioned, "lack of access" (24%); "inconvenient" (20%); "already buy enough" (17%); and, "not in season" (16%).

REASONS WHY MAINE HOUSEHOLDS DO NOT PURCHASE MORE LOCALLY RAISED, GROWN AND CAUGHT FOOD.

24% Lack of access

20% Inconvenient

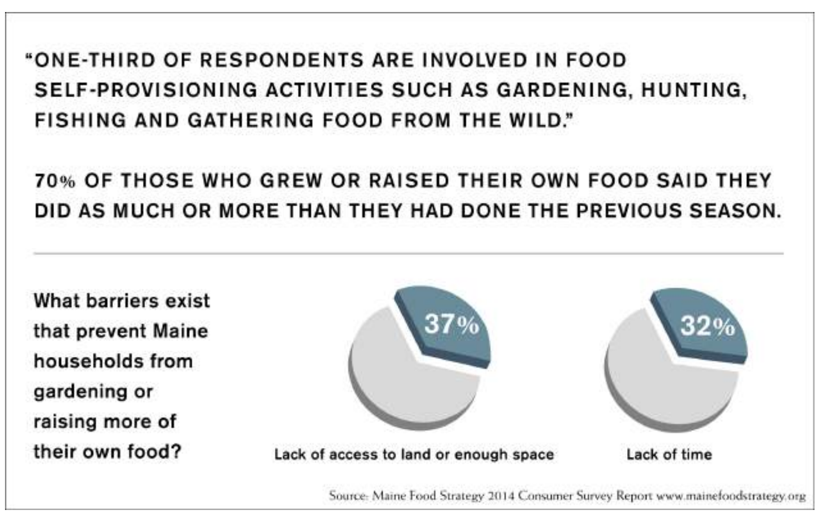
16% Not in season

Source: Maine Food Strategy 2014 Consumer Survey Report www.mainefoodstrategy.org

Self-provisioning: Mainers Gardening, Hunting, Fishing and Gathering Food in the Wild

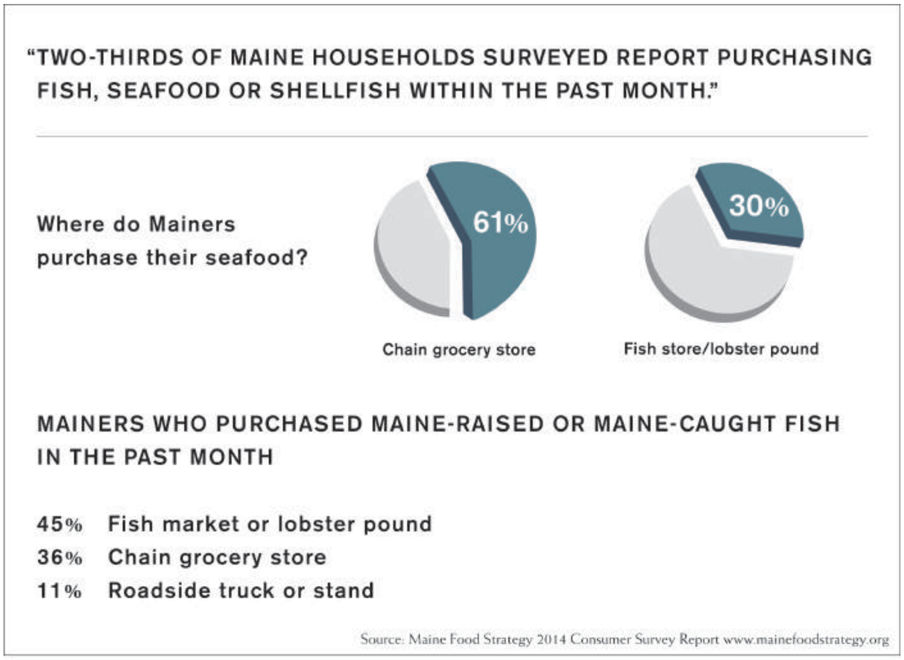
Maine people are also involved in food self-provisioning activities, including gardening, hunting, fishing, and/or gathering food from the wild. A little more than a third of all respondents grow or raise some of their food. And when asked to compare gardening and other food-raising activities with those of the prior year, more than 70% claimed they were growing or raising as much or more food than they did in the past year.

A third of the respondents obtained some of their food from hunting, fishing and food gathering in the wild. When asked what barriers exist to obtaining more food from gardening and food raising, "lack of access to land/room" (37%) and "lack of time" (32%) were the most frequently noted reasons.



Food from the Sea

When queried specifically about the purchase of fish, seafood and shellfish, two-thirds responded that they had purchased fish in the last month. Of these consumers, the majority (61%) did so at a chain grocery store, while the second highest percentage (30%) purchased from a fish market or lobster pound.



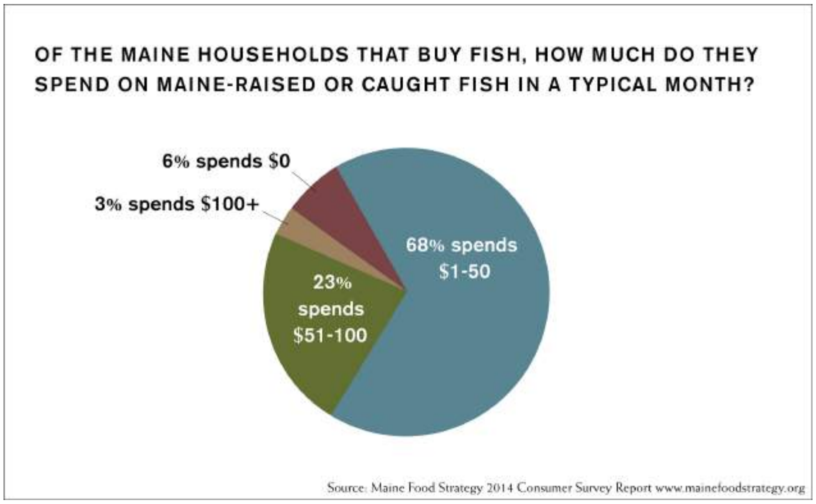
When asked if they had purchased any Maine-raised or Maine-caught fish in the past month, almost half (47%) reported they had done so and a similar percentage (46%) reported purchasing Maine fish from a fish market or lobster pound.

When asked why they did not buy more Maine fish, a significant percentage cited "cost" (27%). Other factors cited as reasons for not purchasing more Maine fish included "already buy enough"(18%); "not always available here" (15%); and "can't tell if it's local" (11%).

Fifty-eight percent (58%) of Maine households said they usually buy "wild caught fish" (not necessarily from Maine) as opposed to "farm raised."

Mainers' Seafood Buying Habits

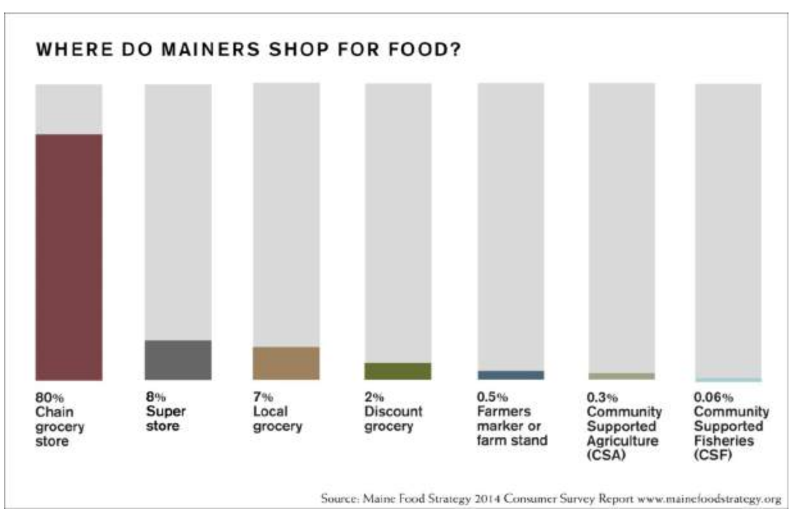
Maine households were asked how much they spend on Maine-raised or Maine-caught fish in a typical month.



About half of respondents noted they purchased fish at a restaurant in the past month. Major factors consumers consider when determining what fish they purchase were “flavor” (93%) and “nutrition” (85%), followed by “cost” (63%); and “antibiotic- and hormone-free” (62%). More than half of households also considered whether fish was “local” (56%), “GMO-free” (55%) and/or “certified sustainable” (55%).

Where Do Mainers Shop for Food?

Overwhelmingly, Maine people purchase most of their food at chain grocery stores. Eighty percent (80%) indicated that over the three months before the survey (early September, October, and November 2013) most of their food was purchased at large grocers. These outlets tend to be located within 15 minutes of where Mainers reside, though fully a third of all respondents travel between 15 and 30 minutes to reach such a chain grocery store.

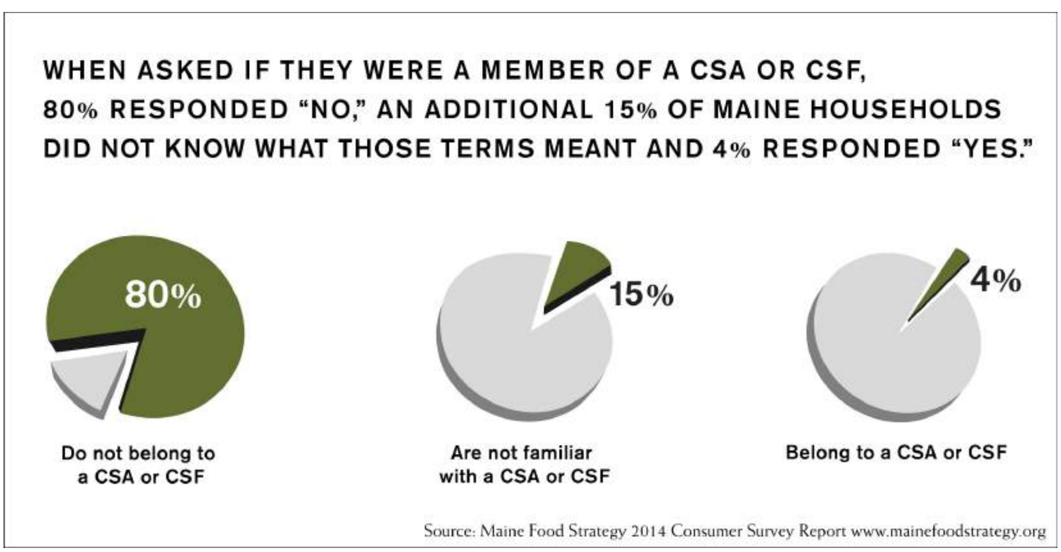


Very few respondents acquired food at a food bank or a food pantry during the three months prior to when they were contacted for the survey. More than 56% of all respondents noted they also purchased food at a farmers market or farm stand.

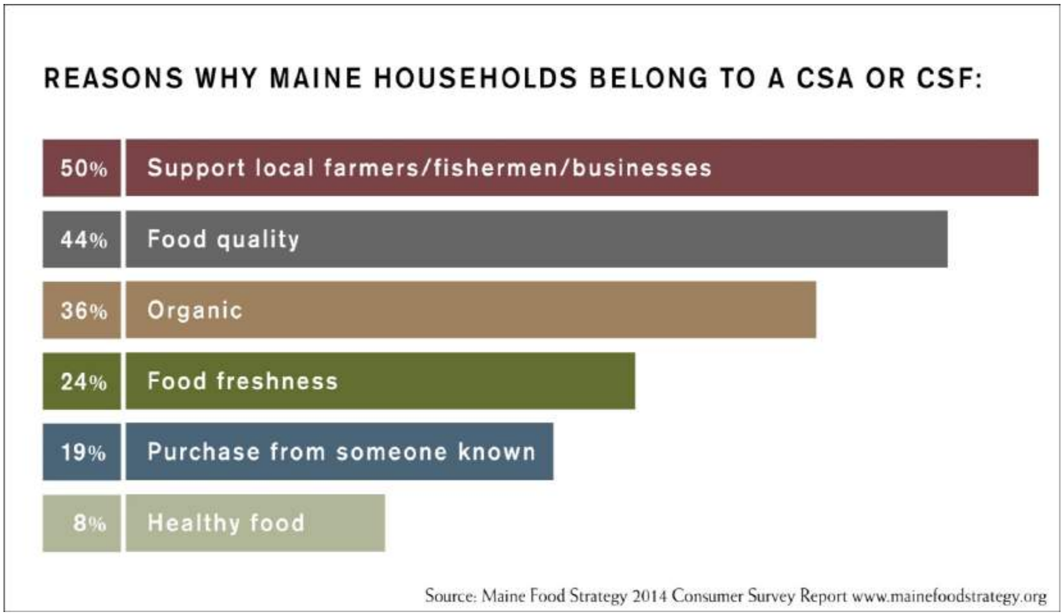
Of those who did so, many shopped at a farmers market several times over the course of the survey period and approximately a third of all respondents shop at such a destination at least once a week.

Few respondents are members of food cooperatives or food buying clubs, or are members of a community supported agriculture (CSA) or a community supported fishery (CSF) venture.

When asked if they were a member of a CSA or CSF, 80% responded "no" and an additional 15% of Maine households did not know what those terms meant.



However, of those households that belong to a CSA or CSF, the majority do so for the following reasons: “to support local farmers/fishermen/businesses” (50%); “food quality” (44%); “it’s organic” (36%); and “food freshness” (24%). Approximately one-third of households cite other reasons for belonging to a CSA or CSF, including knowing the producer or fisherman they’re buying from.



Afterword

If you are interested in reading the full survey and answers that inform this report, please contact mfs@mainefoodstrategy.org and put “Consumer Survey Request Copy” in the subject line of your email, or call (207) 228-8594. Please notify us if you would like to see the weighted and clustered data as well, described below.

We are eager to share our findings and hear from others what insights they can glean from this survey.

A Note on Survey Weighting Methodology

The Maine Food Strategy Consumer Survey was conducted by interviewing a small sample of 590 randomly selected adults in Maine. The interviews were done through telephone surveys by using a technique called "random digit dialing"(RDD). Half of these interviews were conducted with cell phone numbers, while the other half were land lines. The survey questions covered a variety of topic areas including buying habits, awareness of local foods, and extent of self-provisioning.

The purpose of the sample design was to randomly select a small cohort of individuals who accurately represented the whole population in Maine. To mitigate sampling biases and errors, individual responses were weighted in a way that each unit in the sample represents a larger number of units in the population based on their characteristics.

Sampling weights were created keeping the constraints of the survey in mind. Given that this was a survey with individuals responding for the entire family, we created household level weights. There are approximately 550,000 households in Maine which were represented by 590 individuals in our survey. The weight had to be matched with the attributes of the households in Maine. We did so with newly created weights to the proportion of cell phones-only households, land line-only households, income levels and distribution by county.

The weight construction consisted of a two-step process. The first step involved creation of a base weight using the proportion of land line-only and cell phone-only households. These proportions were obtained from Survey Sampling International LLC (SSl), the US Census website for Maine, and in-house historic data. The base weight represented the number of households in each county based on the number of land lines, cell phones, and the number of people interviewed. The base weight was then adjusted for the average number of cell phones and land lines in a given household. The second stage of weight construction, called "post stratification," included extrapolation of base weights to match the proportions of households in a county and income distribution. Other domains, such as gender and educational attainment levels, were considered for post stratification but were ultimately dropped due to the weight basing household level, and not individual level.

Data Limitations & Explanation

Impacts of Survey Timing

Interviews for the Consumer Survey were conducted between September and December 2013. Responses to some questions may have been influenced by when respondents were interviewed during this time frame.

For example, one question asked respondents: "Approximately what percent of all the food they bought in the last 3 months was grown or produced locally?" For respondents interviewed at the beginning of the survey time frame, their buying period would have been during the height of the local growing season, possibly skewing the data toward higher estimates than if the survey had been conducted during the winter or spring. During the three-month time frame prior to the study, over one-third (39%) of respondents reported purchasing between 10-25% of their food locally, while 9% purchased more than half from local sources.

Cost as a Factor in Consumer Purchasing Decisions

The survey summary reports that determinants of local food purchases include "cost." This finding is based on survey results that indicate over 25% of respondents cite "cost" as a factor in why they don't purchase more Maine raised or grown products than they already do. More significantly, over 50% of respondents ranked "cost" as a "9" or "10" in importance. On this question, respondents also gave very high ranks to freshness, flavor, and nutrition.