Survey of Nebraska Households

Expanding Nebraska's Farmers' Markets and Increasing Consumer Awareness of Nebraska's Fresh, Locally Grown Fruits and Vegetables

THE NEBRASKA DEPARTMENT OF AGRICULTURE
AG PROMOTION AND DEVELOPMENT DIVISION

TABLE OF CONTENTS

Introduction

During the first two weeks of April 2004 a phone survey of primary grocery shoppers in 300 Nebraska households was undertaken. The survey was conducted on behalf of the Nebraska Department of Agriculture, Agriculture Promotions Division, and funded by the USDA Federal State Marketing Improvement Program.

Screening of Households
Respondents were screened for the primary grocery shopper in the household. Any respondent stating *"None of the meals or snacks prepared at home include fresh produce like that found in the produce aisle"* was excluded from the survey.

Purpose
Research consumer purchasing behaviors to determine the level of interest in and the current pattern of purchasing locally grown or produced products from several different sources – including grocery stores, farmers' markets, and direct from local farmers, with an emphasis on fresh produce.

Household Demographic Information
The following demographic information was gathered from survey respondents:

- ✓ Location (Area Code)
- ✓ Gender
- ✓ How Often They Attended a Farmers' Market
- ✓ Age
- ✓ Income

A chi-square test of independence was used to determine if responses to individual survey questions were independent of the household demographic information listed above.

Telephone area codes were used to segment Nebraska into Eastern (402 area code) and Western (308 are code) regions with fifty percent (150) of surveyed households located in each region. Sixty-nine percent of survey respondents were female. The largest age group was the 50 to 59 years old, accounting for 22 percent of all respondents. Complete demographic information is presented in Table 1.

Table 1: Household Demographics (Percent of Respondents)

Area Code	%	Gender	%	Attend FM*	%	Age	%	Income	%
308	50%	Female	69%	Regularly	17%	20 to 29	5%	Less than 20,000	12%
402	50%	Male	31%	Occasionally	44%	30 to 39	17%	20,000 to 39,999	26%
				Rarely	22%	40 to 49	17%	40,000 to 59,999	24%
				Never	17%	50 to 59	22%	60,000 to 79,999	14%
						60 to 69	17%	80,000 to 99,999	6%
						70 Plus	20%	100,000 or More	6%
						Refused	1%	Refused	12%

FM = Farmers' Market

Executive Summary

In April 2004, the Food Processing Center surveyed 300 Nebraska households. Survey results relative to Fresh Produce, Local Food Products, Farmers' Market, and Nebraska Logo or Label are summarized below.

Fresh Produce
More than 90 percent of Nebraska households stated that freshness and quality are very important attributes they look for when shopping for fresh produce. Other attributes that more than 50 percent of households rated as very important were appearance, free of chemical residue, and convenience. Almost half of the responding households listed price (48 percent) and natural (45 percent) as very important. Approximately one-fourth of households rated locally grown as not important while over 40 percent gave a not important rating to unusual varieties and organically grown.

Fifty-four percent of households stated that most to all of the produce they prepare at home, *during the local growing season*, came from grocery stores. When asked how much came from farmers' markets, only 11 percent stated most to all while 33 percent stated none. Thirty-one percent stated that most to all came from either their or a friend's garden/orchard. Only 12 percent stated that most to all came from a super or discount store.

Fifty-seven percent of Nebraska households expect *locally grown* produce to be of higher quality than non-locally grown produce. In terms of variety and price, more than 80 percent of responding households expect variety and price of *locally grown* produce to be the same or lower than non-locally grown produce. Only 14 percent of Nebraska households expect to pay a premium for *locally grown* produce.

Locally Grown Foods
Nebraska households are interested in purchasing locally grown foods. Survey respondents indicated that they look for local foods but find it difficult to identify which products are locally grown or produced. Approximately 35 percent of respondents stated that locally grown and grown in Nebraska are very important attributes they look for when shopping for fresh produce. However, they expect locally grown food prices to be the same (53 percent) or lower (30 percent) in comparison to non-locally grown food products, while seventy-three percent expect locally grown food products to be higher in quality.

Only 15 percent of households disagree or strongly disagree with the statement *"I actively look for and purchase local food products."* Over 50 percent of households agree to strongly agree that *"I find it difficult to identify which food products are local,"* while 67 percent state (*agree* to *strongly agree*) that they actively look for and purchase local food products.

Farmers Market
Seventeen percent of all responding households stated that they regularly attended a farmers' market, while 17 percent also stated that they never attend a farmers' market. The largest percent of households, 44 percent, reported that they occasionally attend a farmers' market. When asked about the distance to the closest farmers' market, approximately two-thirds of respondents stated that they were within a 20-minute drive of a farmers' market, while 88

percent of respondents reported that the farmers' market closest to their residence was less than a 1-hour drive.

Approximately 80 percent of households agree or strongly agree with the statements *"Fresh produce is readily available at the farmers' market I attend"* and *"All produce vendors at the farmers' market I attend have the level of quality I desire."* More than 50 percent of households agree or strongly agree with the statements *"The farmers' market needs to offer a greater variety of local foods products"* and *"In the future, I plan on increasing the number of times I attend the farmers market."*

Respondents were asked what two things they liked most and least about the farmers market they attend. Sixty-four percent stated freshness, as either a first or a second response; followed by variety of food (26 percent) and locally grown (14 percent) as the things they liked most. Thirty-three percent stated nothing, as either a first or a second response, followed by inconvenient location/to far (12 percent) as the things they liked least.

Official Nebraska Logo or Label Program

Seventy-three percent of all respondents said they support State funding the development and implementation of an Official Nebraska Logo or Label Program.

Survey Results

(A) Fresh Produce

Frequency of Usage & Number of Meals/Snacks that Include Fresh Produce

The majority of Nebraska households reported that they prepare meals at home five or more times per week.

Table 2: Number of Times Per Week Meals Are Prepared At Home

Number of Weekly Meals Prepared at Home	Percent of Respondents
2 or Less Times	4%
3-4 Times	19%
5-6 Times	31%
7 or More Times	45%

The majority of respondents also reported that *some* to *most* of the meals or snacks prepared at home include fresh produce like that found in the produce aisle. The frequency of fresh produce used in meals or snacks prepared at home is constant throughout the year. As shown in the following table, the differences between frequency of use during the growing season were not significantly different from responses when season was not mentioned. From this, one can conclude that Nebraska household consumption of fresh produce is independent of the time of year.

Table 3: Frequency of In-Home Usage of Fresh Produce

Number of Meals & Snacks	Percent of meals or snacks prepared at home that include fresh produce	During the local growing season, percent of meals or snacks prepared at home that include fresh produce		
	Fresh Produce	Fresh Produce	Fresh Fruit	Fresh Vegetables
All	18%	15%	12%	17%
Most	42%	46%	34%	44%
Some	41%	38%	51%	37%
None	0%	1%	2%	2%

Importance of Product Attributes When Shopping for Fresh Produce

Nebraska households look for freshness and quality when shopping for fresh produce. Other attributes that more than 50 percent of households rated as very important were appearance, free of chemical residue, and convenience. Almost half of the responding households listed price and natural as very important. Approximately one-fourth of households rated locally grown as not important while over 40 percent listed unusual varieties and organically grown as not important. Complete results are shown in Table 4 on the next page.

Table 4: Importance of Fresh Produce Attributes

Attribute	Percent of Respondents Stating Attribute is...			
	Very Important	Somewhat Important	Not Important	No Opinion/ No Answer
Freshness	94%	6%	0.3%	0.3%
Quality	93%	7%	0.0%	0.0%
Appearance	67%	31%	2%	0.0%
Free of Chemical Residue	61%	29%	9%	1%
Convenience	54%	41%	3%	2%
Price	48%	47%	4%	0.7%
Natural	45%	42%	12%	2%
Grown In Nebraska	37%	42%	20%	0.7%
Locally Grown	30%	43%	26%	0.3%
Free of Genetic Modification	28%	36%	30%	6%
Unusual Varieties	16%	43%	41%	0.7%
Organically Grown	14%	38%	47%	1%

The chi square test of independence between fresh produce attributes and household demographics showed the following results:

Table 5: Test of Independence Between Produce Attributes & Household Demographics

Attribute	Household Demographics				
	Gender	Area Code	How Often Attend FM+	Age	Income
	p value (level of significance) based upon sample results				
Freshness	**.006***	.581	.922	.780	.281
Quality	**.025***	.497	.984	.444	.191
Appearance	**.001***	.881	.098	.982	.879
Free of Chemical Residue	.281	.068	.257	.685	.494
Convenience	**.038***	.747	.071	.226	.988
Price	088	.776	.769	.583	**.046***
Natural	**.022***	.928	**.03 ***	.306	.704
Grown In Nebraska	.162	**.041***	**.031***	.848	.161
Locally Grown	.827	.796	**.002***	.545	.471
Free of Genetic Modification)	**.010***	.444	.551	.795	.109
Unusual Varieties	.500	.360	.054	.274	.187
Organically Grown	619	.615	.124	.156	.085

* Not independent at the .05 level of significances.

+ FM = Farmers' Market

The following table (Table 5a) provides a summary of attributes related to household demographics. The level of importance assigned to six of the twelve produce attributes were *not* independent of gender, three were *not* independent of how often a household attends a farmers market, and only one attribute was *not* independent of area code and income. All of the produce attributes were independent of the respondent's age. Grown in Nebraska and natural were the only product attributes that were independent of more than one household demographic.

Table 5a: Attributes *Not* Independent of Household Demographics

Household Demographics	Attribute								
	Freshness	Quality	Appearance	Convenience	Price	Natural	Grown in NE	Locally Grown	Free of Genetic Mod.
Gender	✔	✔	✔	✔		✔			✔
Area Code							✔		
Attend FM+						✔	✔	✔	
Income					✔				

+ FM = Farmers' Market

The level of importance ratings for freshness, quality, free of genetic modification, appearance, natural, and convenience was *not* independent of gender (Table 5 & 5A). Female respondents assigned greater importance to all of these produce attributes than male respondents. Note in Table 6 below that 60 percent of female respondents rated convenience as very important versus only 44 percent of the male respondents. When promoting and selling fresh produce to females, one must demonstrate freshness, quality, appearance, and convenience. In addition, approximately one out of every two females view natural as very important, while 36 percent stated that free of genetic modification was very important.

Table 6: Product Attributes That Were *Not* Independent of Gender

Attribute	Level of Importance					
	Very Important		Somewhat Important		Not Important	
	Male	Female	Male	Female	Male	Female
Freshness	88%	97%	12%	3%	0%	0%
Quality	88%	95%	12%	5%	0%	0%
Free of Genetic Modification	18%	36%	44%	36%	38%	28%
Appearance	52%	74%	46%	24%	2%	2%
Natural	37%	49%	44%	42%	19%	9%
Convenience	44%	60%	52%	37%	3%	2%

The level of importance a household gave to grown in Nebraska was *not* independent of area code (Table 7) and how often they attend a farmers' market (Table 8). Households located in the 308 area code regions of Nebraska assigned a higher level of importance to grown in Nebraska than households in the 402 area code. Households that regularly attend a farmers' market assigned higher importance to grown in Nebraska. Interestingly, the level of importance given to locally grown was independent of area code, but not independent of how often a household attends a farmers' market. Approximately 50 percent of households that regularly attend a farmers' market stated that locally grown is a very important attribute.

Table 7: Product Attributes That Were *Not* Independent of Area Code

	Level of Importance					
	Very Important		Somewhat Important		Not Important	
Area Code	308	402	308	402	308	402
Grown in Nebraska	45%	31%	39%	46%	17%	23%

The level of importance a household selected for natural was *not* independent of how often the household attends a farmers' market (Table 8). Twenty-six percent of households that never attend a farmers' market stated that natural was not an important attribute when selecting fresh produce, while only 8 percent of households that regularly or occasionally attend rated natural as not important.

Table 8: Product Attributes That Were *Not* Independent of Attendance at Farmers' Markets

Attribute	Level of Importance											
	Very Important				Somewhat Important				Not Important			
	Regular	Occasionally	Rarely	Never	Regular	Occasionally	Rarely	Never	Regular	Occasionally	Rarely	Never
Locally Grown	48%	33%	14%	26%	40%	42%	49%	40%	12%	24%	37%	34%
Grown in Nebraska	52%	37%	27%	38%	40%	45%	42%	38%	8%	18%	31%	24%
Natural	45%	48%	40%	44%	47%	43%	48%	30%	8%	8%	11%	26%

The level of importance given to price was related to a household's income as indicated in Table 9. Fifty-eight percent of households with income less than $40,000 rated price as very important while forty percent of households with income greater than $40,000 rated price as very important. Approximately 55 percent of households with incomes greater than $40,000 stated price was somewhat important, while approximately 40 percent of those with incomes less than $40,000 classified price as somewhat important.

Table 9: Product Attributes That Were *Not* Independent of Income

	Level of Importance								
	Very Important			Somewhat Important			Not Important		
Income Level*	<$40	$40-80	>$80	< $40	$40-80	>$80	< $40	$40-80	>$80
Price	58%	40%	40%	39%	53%	57%	3%	7%	3%

* Income: in 000s of dollars

(B) In-Season Fresh Produce

As previously mentioned, consumption of fresh produce by Nebraska households is relatively constant throughout the year. As shown by the following table, during the local growing season, the frequency of including fresh vegetables in meals or snacks prepared at home exceeds the frequency of including fresh fruits.

Table 10: Use of Fresh Items in Meals & Snacks During the Local Growing Season

Frequency of Use in Meals & Snacks	Fresh Produce	Fresh Fruit	Fresh Vegetables
None	1%	2%	2%
Some	38%	51%	37%
Most	46%	34%	44%
All	15%	12%	17%

<u>Source of Fresh Produce During the Local Growing Season</u>
In Question 5 respondents were asked, *"During the local growing season, how much of the fresh produce you prepare at home, including fruits and vegetables, come from each of the following sources?"* When asked how much produce they prepared at home came from grocery stores, 54 percent of households stated that most to all of their fresh produce came from grocery stores. When asked how much came from farmers' markets, only 11 percent stated most to all while 33 percent stated none. Thirty-one percent stated that most to all came from either their or a friend's garden/orchard.

Table 11: Use of Fresh Produce in Meals & Snacks During the Local Growing Season

Frequency of Use	Source of Fresh Produce						
	Own Garden or Orchard	Friend's Garden or Orchard	Farmers' Market	Roadside Stand	Direct from Farmer	Grocery Store	Discount or Super Store
None	44%	38%	33%	45%	54%	4%	43%
Some	32%	55%	56%	51%	37%	43%	45%
Most	19%	6%	9%	3%	7%	40%	10%
All	5%	1%	2%	0%	1%	14%	2%

Table 12: Test of Independence Between Sources of Fresh Produce & Household Demographics

Source of Fresh Produce	Household Demographics				
	Gender	Area Code	Attend FM+	Age	Income
	p value (level of significance) based upon sample results				
Own Garden or Orchard	.368	.053	.120	.774	.066
Friend's Garden or Orchard	.696	.370	.323	.842	**.031***
Farmers' Market	.204	.894	**.001***	.977	**.018***
Roadside Stand	.733	**.037***	**.001***	.781	.418
Direct from Farmer	.343	.601	.096	.104	.669
Grocery Store	.976	.179	**.001***	.998	.599
Discount or Super Store	926	.310	**.004***	.229	.904

* Not independent at the .05 level of significance
+ FM = Farmers' Market

The test of independence showed that three sources were *not* independent of how often a household attends a farmers' market, two were not independent of income, and one was *not* independent of area code.

Table 12a: Sources Not Independent of Household Demographics

Household Demographics	Source of Fresh Produce				
	Friend's Garden or Orchard	Farmers' Market	Roadside Stand	Grocery Store	Discount or Super Store
Area Code			✔		
Attend FM+		✔	✔	✔	✔
Income	✔	✔			

+ FM = Farmers' Market

The amount of fresh produce households purchase from roadside stands was related to the household's area code and related to how frequently they attend a farmers' market. Fifty-three percent of households in the 308 area code (more rural areas) stated that none of the fresh produce came from roadside stands compared to 37 percent in the 402 (more urban areas) area code (see Table 13). The difference is most likely due to lack of roadside stands in the more rural, less populated, areas of Nebraska.

Table 13: Sources of Fresh Produce That Were *Not* Independent of Household Area Code

Frequency of Produce Use from Roadside Stands	**Area Code**	
	308	**402**
None	53%	37%
Some	44%	59%
Most	3%	4%
All	1%	0%

Twenty-five percent of households that regularly attend a farmers' market stated that they get most to all of their fresh produce from grocery stores compared to approximately 70 percent of households that rarely or never attend a farmers' market. Households reporting they rarely attend a farmers' market tend to purchase more of the fresh produce prepared at home from discount/super stores than all the other households. Fifty-two percent of the households that rarely attend and 76 percent of households that never attend a farmers' market stated that none of the fresh produce they prepare at home came from a roadside stand compared to approximately one-third of households that regularly or occasionally attend a farmers' market.

Table 13: Sources of Fresh Produce That Were *Not* Independent of How Often a Household Attends a Farmers' Market

Frequency of Produce Use From:	Frequency of Visits to Farmers' Markets			
	Regularly	Occasionally	Rarely	Never
Grocery Store				
None	6%	2%	3%	6%
Some	69%	47%	29%	22%
Most	21%	42%	50%	38%
All	4%	8%	18%	34%
Discount/Super Store				
None	46%	45%	24%	60%
Some	42%	45%	58%	30%
Most	12%	8%	17%	4%
All	0%	2%	2%	6%
Roadside Stand				
None	33%	35%	52%	76%
Some	60%	60%	48%	24%
Most	8%	5%	0%	0%
All	0%	1%	0%	0%

Household income was related to the amount of fresh produce a household got from a friend's garden/orchard and farmers' market (see table 14). Thirteen percent of households with less than $40,000 annual income stated that most to all of the fresh produce they prepared at home came from a friend's garden or orchard compared to 3 percent of households with incomes of more than $40,000. Lower income households, compared to higher income households, tend to get less of their produce from a farmers' market.

Table 14: Sources of Fresh Produce That Were *Not* Independent of Household Income

Frequency of Produce Use From:	Income Level		
Friend's Garden/Orchard	< $40,000	$40-80,000	> $80,000
None	41%	33%	40%
Some	46%	63%	57%
Most	11%	3%	0%
All	2%	0%	3%
Respondents	100%	100%	100%
Farmers' Market			
None	39%	28%	34%
Some	47%	67%	51%
Most	12%	3%	9%
All	1%	2%	6%
Respondents	100%	100%	100%

(C) Locally Grown Vs. Non-Locally Grown Produce

Expectations of Locally Grown Produce Compared to Non-Locally Grown Produce

Fifty-seven percent of Nebraska households expect locally grown produce, including fruits and vegetables, to be of higher quality than non-locally grown produce. In terms of variety and price, more than 80 percent of responding households expect variety and price of locally grown produce to be the same or lower than non-locally grown produce. To compete with non-locally grown produce, Nebraska producers must offer higher quality produce at the same or lower price as non-locally grown produce or stated differently, only 14 percent of Nebraska households expect to pay a premium for locally grown produce.

Table 15: Expectations of Locally Grown Produce Compared to Non-Locally Grown Produce

Produce Expectations	Produce Characteristics		
	Quality	Variety	Price
Expect local produce to be *lower* in comparison to non-local produce	4%	34%	33%
Expect local produce to be *the same* in comparison to non-local produce	38%	51%	51%
Expect local produce to be *higher* in comparison to non-local produce	57%	15%	14%
Don't know	1%	1%	2%

At the .05 level of significance, survey results show a relationship between expectations for variety and how frequently a household attended a farmers' market (see Table 16).

Table 16: Test of Independence Between Expectations & Household Demographics

Produce Characteristics	Household Demographics			
	Area Code	Attend FM+	Age	Income
	p value (level of significance) based upon sample results			
Quality	.266	.250	.117	.267
Variety	.308	**.010***	.573	.447
Price	.227	.428	.905	.465

***Not independent at the .05 level of significance**
+ FM = Farmers' Market

Twenty-nine percent of households that regularly attend a farmers' market expect local produce to offer greater variety than non-local produce, compared to 15 percent of households that occasionally attend a farmers' market and 8 percent of those that rarely or never attend a farmers' market (see Table 17).

Table 17: Expectations That Were *Not* Independent of How Often a Household Attends a Farmers' Market

Expectation for Variety of Locally Grown Produce	All Households	Frequency of Visits to Farmers' Markets			
		Regularly	Occasionally	Rarely	Never
Expect local produce to be *lower* in comparison to non-local produce	34%	29%	33%	42%	30%
Expect local produce to be *the same* in comparison to non-local produce	51%	40%	52%	50%	58%
Expect local produce to be *higher* in comparison to non-local produce	15%	29%	15%	8%	8%
Don't know	1%	2%	0%	0%	4%

(D) Farmers' Markets

Distance to Nearest Farmers' Markets

When asked about the distance to the closest farmers' market, approximately two-thirds of respondents stated that they were within a 20-minute drive of a farmers' market, while 88 percent of respondents reported that the farmers' market closest to their residence was less than a 1-hour drive.

Table 18: Distance to Nearest Farmer's Market

The farmers' market closest to my residence is…	Percent of Respondents
Less than a 20-minute drive	66%
More than 20 minutes but less than a 1-hour drive	22%
A 1- to 2-hour drive	6%
More than a 2-hour drive	3%
Don't know	3%
Total	100%

As shown in Table 19, the distance to the nearest farmers' market and how often a household attends a farmers' market are *not* independent. Forty-two percent of households that never attend a farmers' market stated that the nearest one was less than a 20-minute drive compared to 81 percent of households that are regular attendees (see Table 20). One hundred percent of regular attendees compared to 62 percent that never attend were within a one-hour drive of a farmers' market.

Table 19: Test of Independence Between Distance To Farmers' Market & Household Demographics

	Household Demographics				
	Gender	Area Code	Attend FM+	Age	Income
	p value (level of significance) based upon sample results				
Distance to Farmers' Market	.250	.308	**.001***	.067	.618

*****Not independent at the .05 level of significance
+ FM = Farmers' Market

Table 20: Distances to Nearest Farmers' Market That Were *Not* Independent of How Often a Household Attends a Farmers' Market

Distance to Nearest Farmers' Market	Frequency of Visits to Farmers' Markets			
	Regularly	Occasionally	Rarely	Never
Less than a 20-minute drive	81%	77%	52%	42%
More than 20 minutes but less than a 1-hour drive	19%	18%	33%	20%
A 1- to 2-hour drive	0%	5%	11%	10%
More than a 2-hour drive	0%	0%	3%	14%
Don't know	0%	1%	2%	14%

Frequency of Attending Farmers' Market

When queried on the frequency of visits to farmers' markets, 17 percent of all responding households stated that they regularly attended a farmers' market, while 17 percent also stated that they never attend a farmers' market. The largest percent of households, 44 percent, reported that they occasionally attend a farmers' market. Table 22 below compares frequency of attending a farmers' market with household demographics.

Table 21: Households That Attend a Farmers' Market

Frequency of Visits to Farmers' Markets	All Respondents
Regularly	17%
Occasionally	44%
Rarely	22%
Never	17%

Table 22: Test of Independence Between Farmers' Market Attendance & Household Demographics

Farmers' Market Attendance	Household Demographics			
	Gender	Area Code	Age	Income
	p value (level of significance) based upon sample results			
How Often Respondents Attend	.179	.091	**.045***	.241

***Not independent at the .05 level of significance

How often a household attends a farmers' market is *not* independent of age. Approximately 20 percent of age 40-59 respondents regularly attend a farmers' market compared to only 10 percent of respondents that are less than 40 years old (see Table 23).

Table 23: How Often A Household Attends a Farmers' Market Was *Not* Independent of Household Income

Frequency of Visits to Farmers' Markets	Age		
	Less Than 40	40-59	60 Plus
Regularly	10%	21%	18%
Occasionally	44%	44%	44%
Rarely	24%	26%	17%
Never	22%	9%	21%

What Households like *Most* and *Least* about the Farmers' Market

What do households that attend the farmers' market like *most* about the farmers' market? When asked, households provided 18 different first responses. Fresh was the most frequent response at 52 percent of households. Variety of foods was the only other response made by more than 10 percent of households and locally grown was the first mention by only 6 percent of households. The remaining 15 responses were all below 5 percent of responding households and are not listed in Table 24.

Table 24: What Respondents Like *Most* About Farmers' Markets (First Mention)
(Base: Those who attend a farmers' market)

Most Liked Attributes of Farmers' Markets	Percent of Respondents
Fresh	52%
Variety of Food	17%
Locally Grown	6%
Total Number of Households	250

Households were subsequently asked for the second thing they liked *most* about farmers' markets. The percent of households mentioning fresh as either a first or second reply increased to 64 percent, followed by variety of foods (26 percent) and locally grown (14 percent).

Table 25: What Respondents Like *Most* About Farmers' Markets (Total Mentions/Two Replies)
(Base: Those who attend a farmers' market)

Most Liked Attributes of Farmers' Markets	Percent of Respondents
Fresh	64%
Variety of Food	26%
Locally Grown	14%
Quality Selections	11%
Friendly People/Attitudes	8%
Fun Place To Go/Atmosphere	8%
Supports Local Farmers/People	6%
Lower Prices/Competitive	6%
More Flavor/Taste	5%
Total Number of Households	250

In Table 26 below, a comparison of the first two answers households gave to what they like *most* about farmers' markets with how frequently the household attends a farmers' market is given.

Table 26: Percent of Households That Attend a Farmers' Market & Their *Most* Liked Features
(Base: Those who attend a farmers' market) (Total Mentions/Two Replies)

Regularly Attend	%	Occasionally Attend	%	Rarely Attend	%
Fresh	69%	Fresh	70%	Fresh	48%
Locally Grown	23%	Locally Grown	11%	Locally Grown	12%
Variety of Food	17%	Variety of Food	28%	Variety of Food	27%
Friendly People/Attitudes	12%	Friendly People/Attitudes	11%	Friendly People/Attitudes	0%
Quality Selections	10%	Quality Selections	11%	Quality Selections	14%
Total # of Households	52	Total # of Households	132	Total # of Households	66

What do households like *least* about farmers' markets? Nothing! Thirty-three percent of households who attend a farmers' market stated as their first response – None! Ten percent of responding households stated inconvenient location or too far. Twenty-three percent of households that rarely attend, thirteen percent of households in area code 308, and eight percent in area code 402 stated inconvenient location or too far.

Table 27: What Respondents Like *Least* About Farmers' Markets (First Mentions)
(Base: Those who attend a farmers' market)

Most Liked Attributes of Farmers' Markets	Percent of Respondents
None	33%
Inconvenient Location/Too Far	10%
Don't know	7%
Crowded Area	6%
Limited Days/Not Always Open	6%
Lack of Variety	6%
Limited/Poor Parking	5%
Total Number of Households	250

Looking at a household's first and second responses, nothing accounted for 33 percent of the households followed by inconvenient location or too far (see Table 28).

Table 28: What Respondents Like *Least* About Farmers' Markets (Total Mentions/Two Replies)
(Base: Those who attend a farmers' market)

Most Liked Attributes of Farmers' Markets	Percent of Respondents
None	33%
Inconvenient Location/Too Far*	12%
Lack of Variety	8%
Don't Know	7%
Limited Days/Not Always Open	7%
Crowded Area	6%
Limited/Poor Parking	6%
Seasonal/Not Year Round	6%
Open To The Elements/Weather	5%
Small Quantities	5%
Limited Hours	5%
Total Number of Households	250

* 15 percent of households in 308 versus 8 percent in area code 402

The top five responses to what respondents like *least* about farmers' markets are listed below in Table 29 by how often the household attends a farmers' market. Note that 26 percent of the 66 households that rarely attend the farmers' market stated as either their first or second response inconvenient location or too far.

Table 29: Percent of Households That Attend a Farmers' Market & Their *Least* Liked Features
(Base: Those who attend a farmers' market) (Total Mentions/Two Replies)

Regularly Attend	%	Occasionally Attend	%	Rarely Attend	%
None	33%	None	35%	None	30%
Crowded Area	15%	Inconvenient Location/Too Far	9%	Inconvenient Location/Too Far	26%
Seasonal/Not Year Round	10%	Lack of Variety	9%	Don't Know	11%
Limited Hours	10%	Don't Know	7%	Limited Hours	8%
Limited Days/Not Always Open	8%	Open To The Elements/Weather	7%	Limited Days/Not Always Open	8%
Total # of Households	52	Total # of Households	132	Total # of Households	66

Expectations of Food Products at Farmers' Market

Prices at the Farmers' market are expected to be the same (53 percent) or lower (30 percent) in comparison to food products respondents buy elsewhere, while seventy-three percent expect food products at the farmers' market to be higher in quality.

Table 30: Expectations of Food Products at Farmers' Markets Compared to Products Purchased Elsewhere

Produce Expectations	Produce Characteristics		
	Quality	Variety	Price
Expect farmers' market product to be *lower* in comparison to products purchased elsewhere	2%	37%	30%
Expect farmers' market product to be *the same* in comparison to products purchased elsewhere	25%	42%	53%
Expect farmers' market product to be *higher* in comparison to products purchased elsewhere	73%	20%	16%
Don't Know	0.0%	0.4%	1%
Total Number of Households	250	250	250

Table 31: Test of Independence Between Expectations & Household Demographics

Product Characteristics	Household Demographics				
	Gender	Area Code	Attend FM+	Age	Income
	p value (level of significance) based upon sample results				
Quality	.263	.557	.183	.063	.108
Variety	.610	**.047***	.191	.055	.073
Price	.616	**.001***	.143	.395	.332

*****Not independent at the .05 level of significance

+ FM = Farmers' Market

Variety and price are the only expectations that are *not* independent of a household demographic – area code. Area code 402 households expect greater variety of products at the farmers' market than households in area code 308. A greater proportion of households in area code 308 expect farmers' market prices to be lower than households in area code 402.

Table 32: Expectations For Variety & Price Are *Not* Independent of Area Code

Expectation for Variety & Price of Farmer's Market Products	Product Characteristics			
	Variety		Price	
	Area Code		Area Code	
	308	402	308	402
Expect farmers' market product to be *lower* in comparison to products purchased elsewhere	38%	36%	32%	29%
Expect farmers' market product to be *the same* in comparison to products purchased elsewhere	47%	37%	59%	46%
Expect farmers' market product to be *higher* in comparison to products purchased elsewhere	16%	27%	7%	25%
Don't Know	1%	0%	3%	0%

Level of Agreement with Statements Concerning Farmers' Market

Households that attend a farmers' market were asked to give their opinion on a series of statements about the fresh produce, level of quality, and variety of food products available at farmers markets and whether they plan to increase attendance. Approximately 80 percent of households either agree or strongly agree with the statements *"Fresh produce is readily available at the farmers' market I attend"* and *"All produce vendors at the farmers' market I attend have the level of quality I desire."* More than 50 percent of households agree or strongly agree that *"The farmers' market needs to offer a greater variety of local foods products"* and *"In the future, I plan on increasing the number of times I attend the farmers market."*

Table 33: Level of Agreement With Statements Concerning Farmers' Market (Households that attend Farmers Market)

Statements Concerning Farmers' Markets	Level of Agreement					
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total Households
Fresh produce is readily available at the farmers' market I attend.	0.4%	6%	11%	56%	27%	250
All produce vendors at the farmers' market I attend have the level of quality I desire.	0.0%	5%	16%	53%	27%	250
The farmers' market needs to offer a greater variety of local food products.	1%	19%	22%	43%	15%	250
In the future, I plan on increasing the number of times I attend the farmers' market.	3%	13%	30%	43%	11%	250

Table 34: Test of Independence Between Statements Concerning Farmers' Market & Household Demographics

Statements Concerning Farmers' Markets	Household Demographics				
	Gender	Area Code	How Often Attend FM+	Age	Income
Fresh produce is readily available at the farmers' market I attend.	.134	.853	**.001***	.539	.771
All produce vendors at the farmers' market I attend have the level of quality I desire.	.273	.416	.603	.639	.158
The farmers' market needs to offer a greater variety of local food products.	.125	.140	.622	.618	.150
In the future, I plan on increasing the number of times I attend the farmers' market.	.466	.177	**.001***	.277	.632

*****Not independent at the .05 level of significance

+ FM = Farmers' Market

The agreement with availability of fresh produce and plans to increase farmers market attendance is not independent with how often a household attends a farmers market.

Table 35: Statements Concerning Farmers' Market They Attend That Are Not Independent of Household Demographics

Statements Concerning Farmers' Market	Household Demographics	
	Attend FM+	Age
Fresh produce is readily available at the farmers' market I attend.	✔	
In the future, I plan on increasing the number of times I attend the farmers' market.	✔	

Ninety-four percent of households that regularly attend the farmers' market and 86 percent of those that occasionally attend either agree or strongly agree that fresh produce is readily available, compared to 67 percent of households that rarely attend the farmers' market.

Table 36: Level of Agreement with Statements About the Farmers' Market by How Often They Attend Farmers

Statement: ***Fresh produce is readily available at the farmers' market I attend.***	Frequency of Visits to Farmers' Markets			
	Regularly	Occasionally	Rarely	Never
Strongly Disagree	0%	1%	0%	N/A
Disagree	4%	5%	8%	N/A
Neutral	2%	8%	26%	N/A
Agree	56%	61%	44%	N/A
Strongly Agree	38%	25%	23%	N/A
Total Number of Households	52	132	66	0

Sixty-five percent of households that occasionally attend the farmers' market agree to strongly agree that they will increase the number of times they attend a farmers' market in the future, compared to 37 percent of those that rarely attend and 46 percent of those that regularly attend the farmers' market.

Table 37: Level of Agreement with Statements About the Farmers' Market by How Often They Attend Farmers

Statement: ***In the future, I plan on increasing the number of times I attend the farmers' market.***	Frequency of Visits to Farmers' Markets			
	Regularly	Occasionally	Rarely	Never
Strongly Disagree	2%	1%	8%	N/A
Disagree	21%	8%	18%	N/A
Neutral	31%	27%	38%	N/A
Agree	33%	55%	26%	N/A
Strongly Agree	13%	10%	11%	N/A
Total Number of Households	52	132	66	0

(E) Local Food Products

Level of Agreement with Statements Concerning Local Food Products

All respondents were asked a series of questions pertaining to local food products. Only 15 percent of households either disagree or strongly disagree with the statement *"I actively look for and purchase local food products."* Over 50 percent of households either agree or strongly agree that *"I find it difficult to identify which food products are local,"* while 67 percent state (either *agree or strongly agree*) that they actively look for and purchase local food products.

Table 38: Level of Agreement With Statements Concerning Local Foods (All Households)

Statements Concerning Local Food Products	Level of Agreement					
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total Households
I actively look for and purchase local food products.	2%	13%	18%	49%	18%	300
I find it difficult to identify which food products are local.	4%	28%	14%	38%	16%	300
I would be very interested in a service allowing me to order local food products via the internet and pick up from a centralized location such as my church.	13%	41%	19%	19%	8%	300

Table 39: Test of Independence Between Statements Concerning Local Food Products & Household Demographics

Statements Concerning Local Foods	Household Demographics				
	Gender	Area Code	How Often Attend FM+	Age	Income
I actively look for and purchase local food products.	.155	.059	**.016***	.402	.500
I find it difficult to identify which food products are local.	.087	.932	.482	.070	.892
I would be very interested in a service allowing me to order local food products via the internet and pick up from a centralized location such as my church.	.233	.298	.514	**.002***	.347

*****Not independent at the .05 level of significance + FM = Farmers' Market

Table 39: Statements Concerning Local Food Products That Are Not Independent of Household Demographics

Statements About Locally Grown Foods	Household Demographics	
	Attend FM+	Age
I actively look for and purchase local food products.	✔	
I would be very interested in a service allowing me to order local food products via the internet and pick up from a centralized location such as my church local food products via the internet and pick up from a centralized location such as my church.		✔

Eighty-three percent of households that regularly and 74 percent of those the occasionally attend a farmers' market state (either agree or strongly agree) that they actively look for and purchase local food products. In fact, more than 50 percent of households that rarely or never attend the farmers market either agree or strongly agree with the statement "I actively look for and purchase local food products."

Table 40: Level of Agreement with Statements Local Foods by How Often They Attend Farmers

Statement: ***I actively look for and purchase local food products.***	Frequency of Visits to Farmers' Markets			
	Regularly	Occasionally	Rarely	Never
Strongly Disagree	0%	2%	5%	2%
Disagree	%	9%	20%	18%
Neutral	10%	15%	24%	28%
Agree	58%	53%	41%	42%
Strongly Agree	25%	21%	11%	10%
Total Number of Households	52	132	66	50

Support for "Made in Nebraska" Label or Logo Program

Based upon survey results, it is concluded respondents want a Nebraska label of logo program. First, respondents were read the following statement:

Nebraska does not have an official state label or logo program to identify products that are "Made in Nebraska," while many other states do. For example, Iowa's label program is called "Taste of Iowa" and the Dakotas have "Dakota Pride."

Then respondent were asked, *"Would you support funding, by the State, for development and implementation of a "Made in Nebraska" label or logo program?"* Seventy-three percent of all households surveyed stated Yes!

Table 40: Support for “Made in Nebraska” Label Program

Response	Percent of Respondents
Yes	73%
No	19%
Not Sure	8%
Total Number of Households	300

The test of independence showed that support for State funding for development and implementation of a Nebraska label or logo program is very strong regardless of the respondent’s demographics.

Table 41: Test of Independence Between Support for Label Program & Respondent Demographics

Level of Support	Household Demographics				
	Gender	Area Code	How Often Attend FM+	Age	Income
	.254	.637	.682	.344	.819

+ FM = Farmers’ Market