

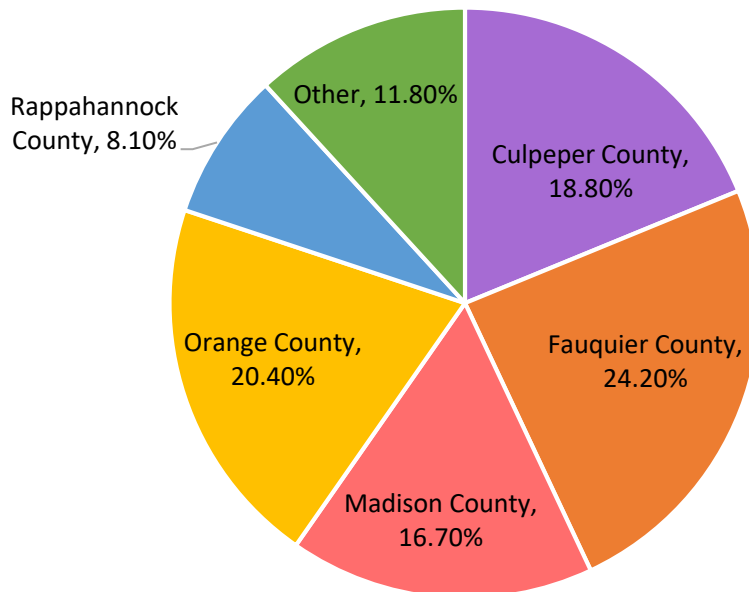
Rappahannock-Rapidan Regional Food Brand Study

Consumer Survey Results

April 3, 2017

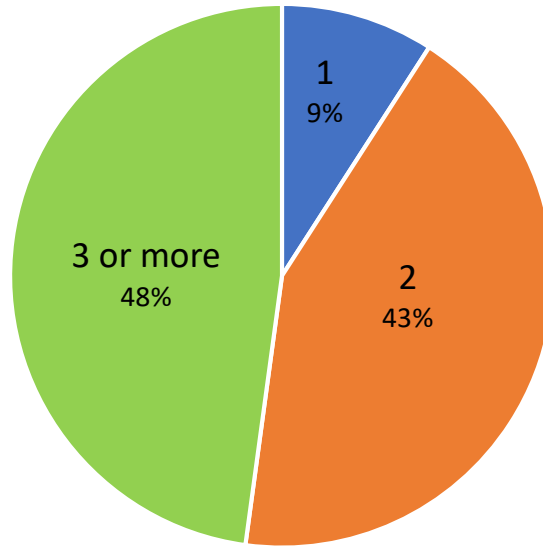
The survey was distributed in February 2017 to consumers of edible farm products within the Rappahannock-Rapidan region, which consists of Culpeper, Fauquier, Madison, Orange and Rappahannock Counties, in February 2017. The link to the online survey was sent to the 531 individuals on the Rappahannock- Rapidan Regional Commission’s email distribution list, as well as through a Facebook advertisement targeted by location. Respondents were given 15 days to respond anonymously, and 186 responses were received. Following are the results.

What county do you live in?



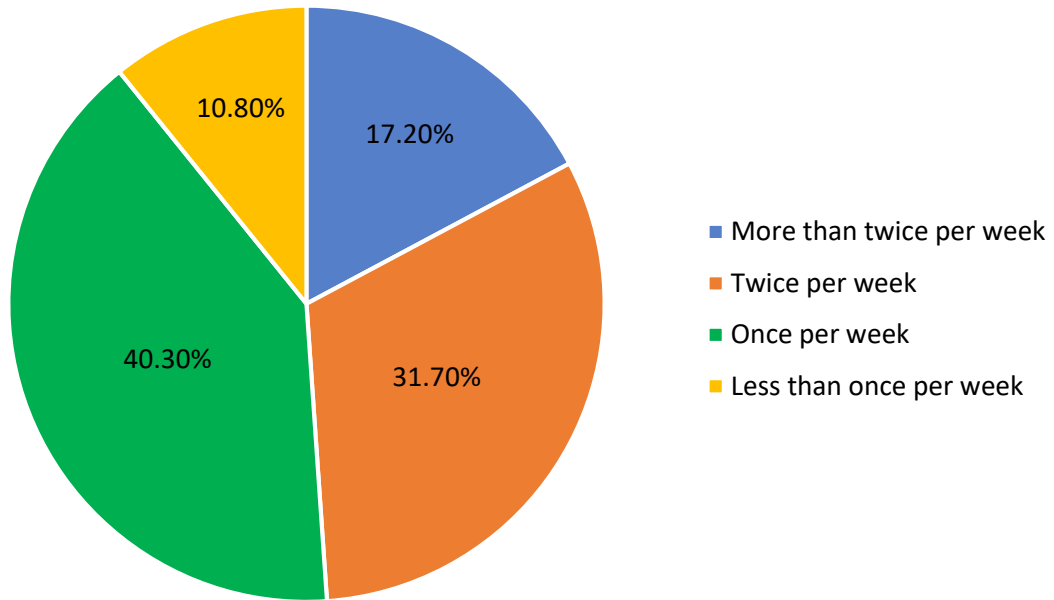
Answer Options	Response Percent	Response Count
Culpeper County	18.8%	35
Fauquier County	24.2%	45
Madison County	16.7%	31
Orange County	20.4%	38
Rappahannock County	8.1%	15
Other (please specify)	11.8%	22
<i>answered question</i>		186
<i>skipped question</i>		0

How many people are in your household?



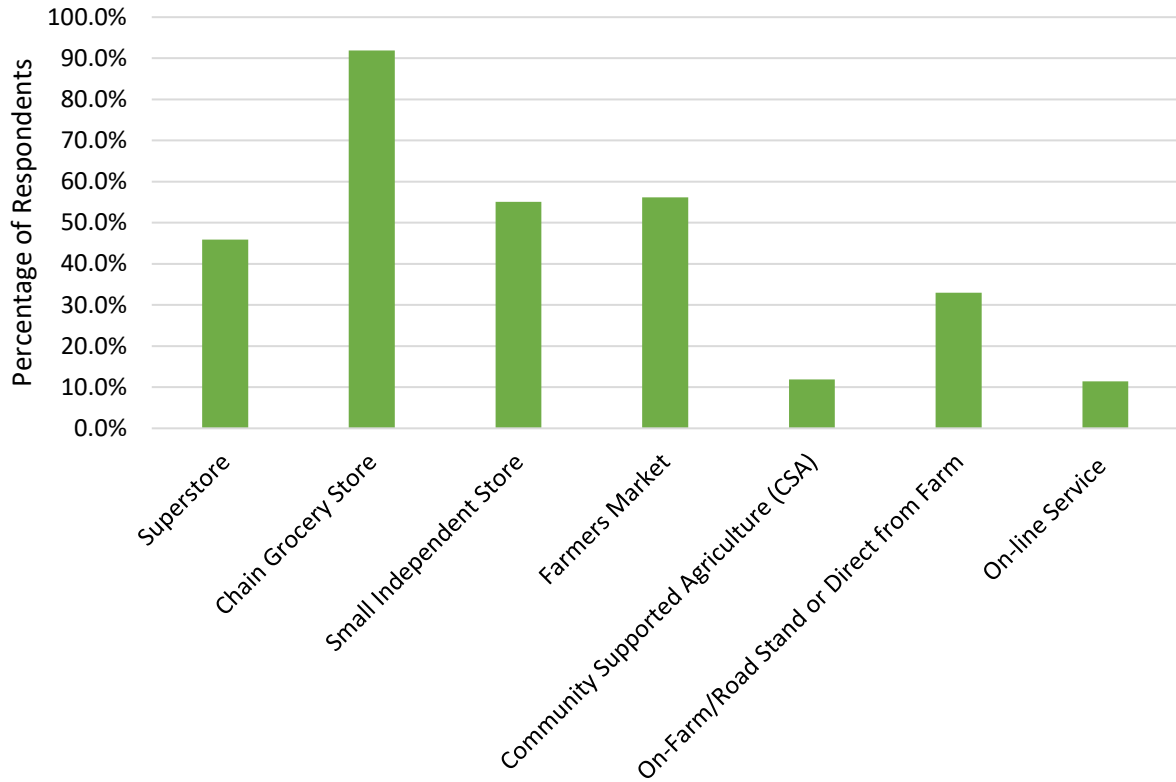
Answer Options	Response Percent	Response Count
1	9.1%	17
2	43.0%	80
3 or more	47.8%	89
<i>answered question</i>		186
<i>skipped question</i>		0

How often does your household shop for groceries?



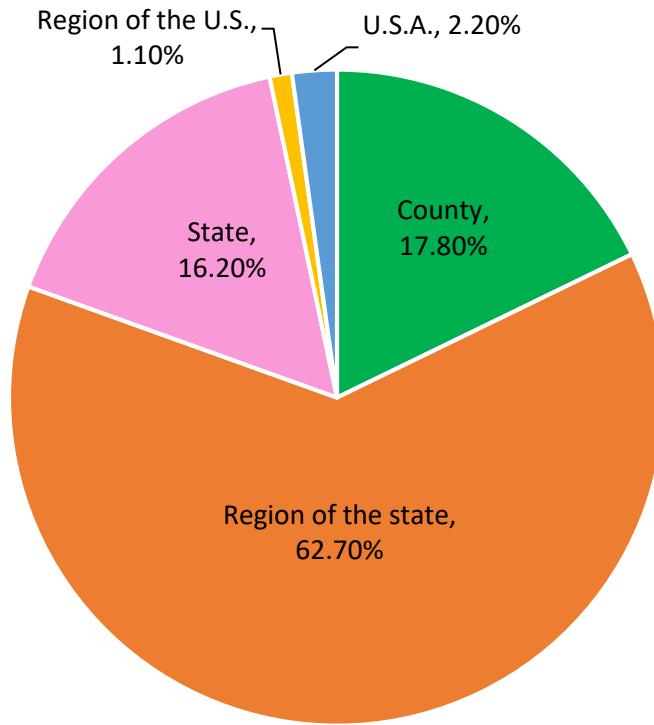
Answer Options	Response Percent	Response Count
More than twice per week	17.2%	32
Twice per week	31.7%	59
Once per week	40.3%	75
Less than once per week	10.8%	20
<i>answered question</i>		186
<i>skipped question</i>		0

Where do you shop for groceries? (check all that apply)



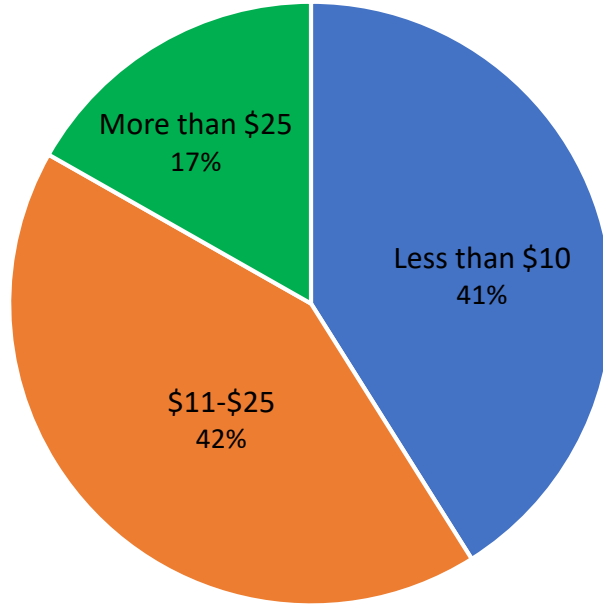
Answer Options	Response Percent	Response Count
Superstore (e.g. Walmart, SuperTarget)	45.9%	85
Chain Grocery Store (e.g. Giant, Aldi, Weis Markets)	91.9%	170
Small Independent Store (e.g. Messick's Farm Market, Yoder's Country Market, Moving Meadows Bakery)	55.1%	102
Farmers Market	56.2%	104
Community Supported Agriculture (CSA)	11.9%	22
On-Farm/Road-side Stand or Direct from Farmer (not including CSA shares)	33.0%	61
On-line Service (e.g. Relay Foods, Amazon Pantry, Blue Apron)	11.4%	21
<i>answered question</i>	185	185
<i>skipped question</i>	1	1

How do you define local food?



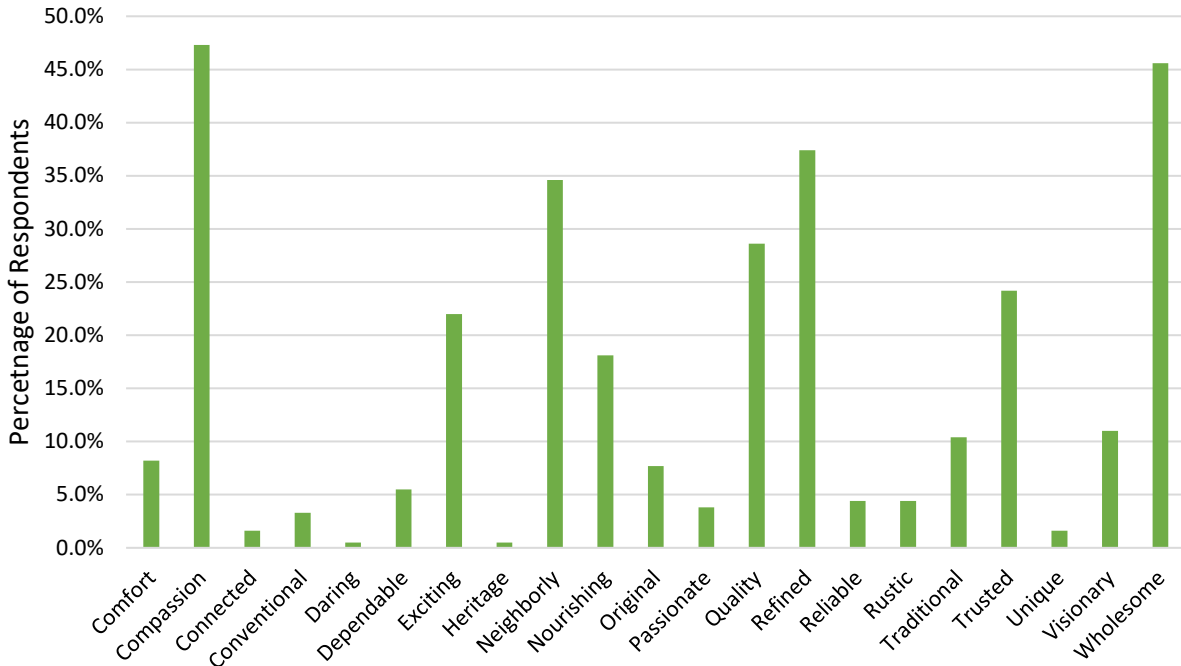
Answer Options	Response Percent	Response Count
Grown in my county	17.8%	33
Grown in my region of the state (e.g. Northern Piedmont, Shenandoah Valley)	62.7%	116
Grown in my state	16.2%	30
Grown in my region of the U.S. (e.g. east coast)	1.1%	2
Grown in the U.S.A.	2.2%	4
<i>answered question</i>		185
<i>skipped question</i>		1

For every \$100 you spend on food, on average, how much of it is spent on locally grown food?



Answer Options	Response Percent	Response Count
Less than \$10 (i.e less than 10%)	41.1%	76
\$11-\$25 (i.e. 11-25%)	42.2%	78
More than \$25 (i.e. More than 25%)	16.8%	31
<i>answered question</i>		185
<i>skipped question</i>		1

**When you think about food from the Rappahannock-Rapidan Region, what words come to mind first?
(Please pick your top three choices)**



Answer Options	Response Percent	Response Count
Comfort	8.2%	15
Compassion	47.3%	86
Connected	1.6%	3
Conventional	3.3%	6
Daring	0.5%	1
Dependable	5.5%	10
Exciting	22.0%	40
Heritage	0.5%	1
Neighborhood	34.6%	63
Nourishing	18.1%	33
Original	7.7%	14
Passionate	3.8%	7
Quality	28.6%	52
Refined	37.4%	68
Reliable	4.4%	8
Rustic	4.4%	8
Traditional	10.4%	19
Trusted	24.2%	44
Unique	1.6%	3
Visionary	11.0%	20
Wholesome	45.6%	83
Other (please specify)		25
<i>answered question</i>		182
<i>skipped question</i>		4

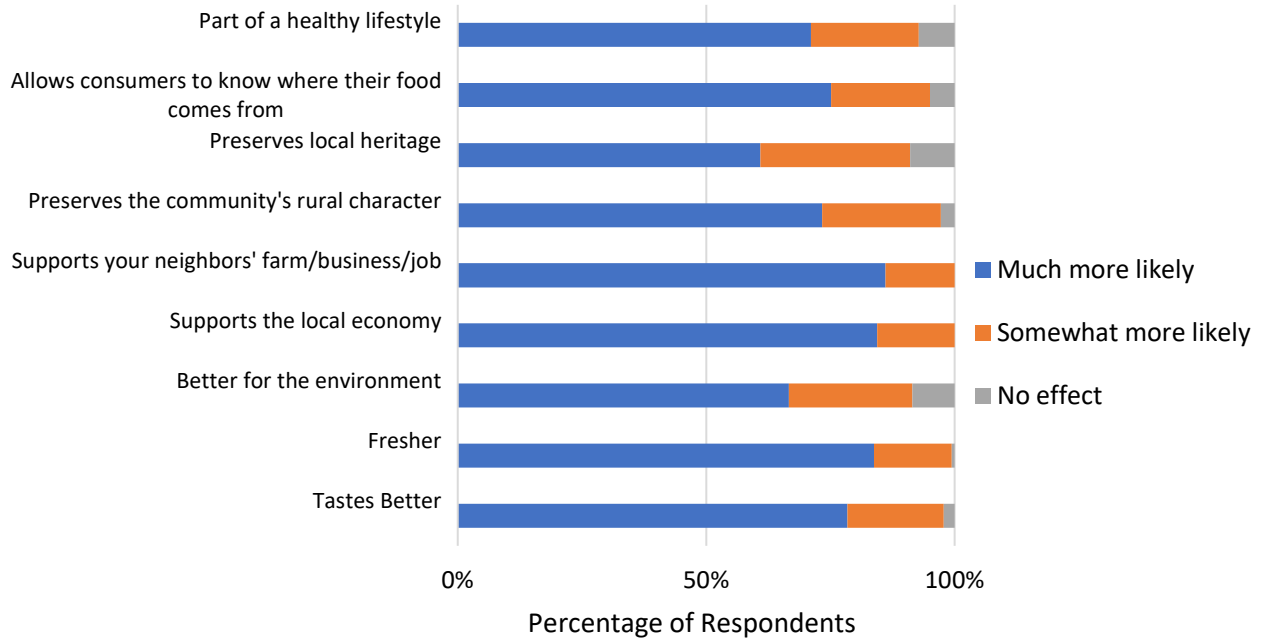
What do you like Best About Food Grown in the region?

- Freshness (19 respondents)
- Supports local farmers and agriculture (12 respondents)
- Taste/ flavor is better (9 respondents)
- Taste and freshness (4 respondents)
- Freshness and supports small businesses (3 respondents)
- Supports the local economy (3 respondents)
- It's local (3 respondents)
- Freshness and organic (3 respondents)
- Freshness and healthiness (2 respondents)
- Fresh and safe (2 respondents)
- Quality and flavor (2 respondents)
- Tastes like home (2 respondents)
- It is wholesome and fresh
- Good local fresh
- Very good. Fresh. No preservatives.
- Fresher tasting, since little to no shipping time.
- Freshness, love pick my own
- Picked recently
- Fresh and good quality
- The quality and the tastiness
- Reliable
- Great quality and variety
- Produce is fresh and there is a good variety
- Quality and supporting local merchants.
- It supports our local economy not Mexico's.
- Makes me feel like I am supporting my region!
- The money benefits my local community.
- It makes me feel connected to my community.
- Community connection
- Meeting or at least supporting the people who produce it
- I know my farmer neighbors!
- Knowing the farmers who grow it.
- Fresh & from known source
- Generally safe to eat, I know the grower
- Knowing the source
- I "know where it's been."
- I know who's growing and how it's grown
- Knowing the growers/ranchers personally.
- Relationships with the growers.
- Meeting local growers
- Support small businesses
- Fresh, naturally grown
- Fresh, natural, seasonal
- It is mostly organic.
- Abundance of food raised ethically and grown without pesticides
- Ability to be less processed
- The flavor and health benefits.
- Better for our family. Supports local jobs.
- Freshness and connection to the area.
- Fresh and delicious food. Helping neighbors
- I love the freshness and the people
- Freshness and adding value back into the community
- Fresh and locally farmed
- Fresh and grown in USA
- Fresh, organic, supports local farmers
- Freshness, quality, flavor, health benefit
- Convenience
- We like pick-your-own

- I grow my own when possible - price, quality, taste, growing it myself
- Leafy in spring and fall, and colorful in the summer
- How fresh it tastes. I feel like it is safe from chemicals & GMOs.
- You can find out if how they grow it as in whether or not they use pesticides.
- Often I know the farmer and their practices in growing/raising the food.
- Knowing growing practices and conditions for both vegetables and meat
- Direct from the farmer. We grow most of our food here on the farm- eggs, beef, pork, chicken. We run a CSA that combines vegetables, eggs and meat, getting only out season fruit at stores.
- It's eco-friendly because it doesn't travel far and, the way I buy, is mostly organic and from family farms.
- I like that lots of the food we get from small local farmers is often more delicious than grocery store food (unique produce with superior flavors, fresh-made baked goods, dairy and meat from pastured animals), I like supporting local small businesses and our regional economy, and I like the sustainability of eating what our local land can provide.
- The ability to buy locally and support local food industry. The knowledge the food is grown here and not transported/sitting for days or weeks on end.
- I like knowing my farmer and how they produced the food that I cannot yet produce for myself. We are about 80% free from conventional food. Real food from real people who care just as much about its quality as I do.
- The full circle impact = we get to know the producers, they know us, they provide high quality nutritious food, and we in turn support their family/farm (financially)
- The irrigation water is cleaner, the food does not travel far to consumer, farmers contribute to the local economy
- I generally buy locally only in the summer/fall months. There's a nice selection, I enjoy the market then. Other than that, I'm a "get it done on the way home from work" kind of gal, but I like to support the "locals" when I have the time and the money.
- Less fossil fuels being used in transport and pesticide usage (usually), food is more likely to be organic, people are more passionate about food they grow themselves
- The potential to help local farmers develop and sustain their businesses and invest in more environmentally sustainable practices.
- The variety of food I can get. It's pretty easy to find most of the ingredients you need for a meal, most of the year. There are also a lot of farmers following organic and humane practices.
- It supports local farmers and the local economy. It helps to keep land used for farming instead of being developed for something else.
- Grown by my neighbors so I know they want to grow the best food they can because we have a relationship of trust
- The people who grow it! They are stewards of the land, forward-thinking, compassionate and ecologically-minded.

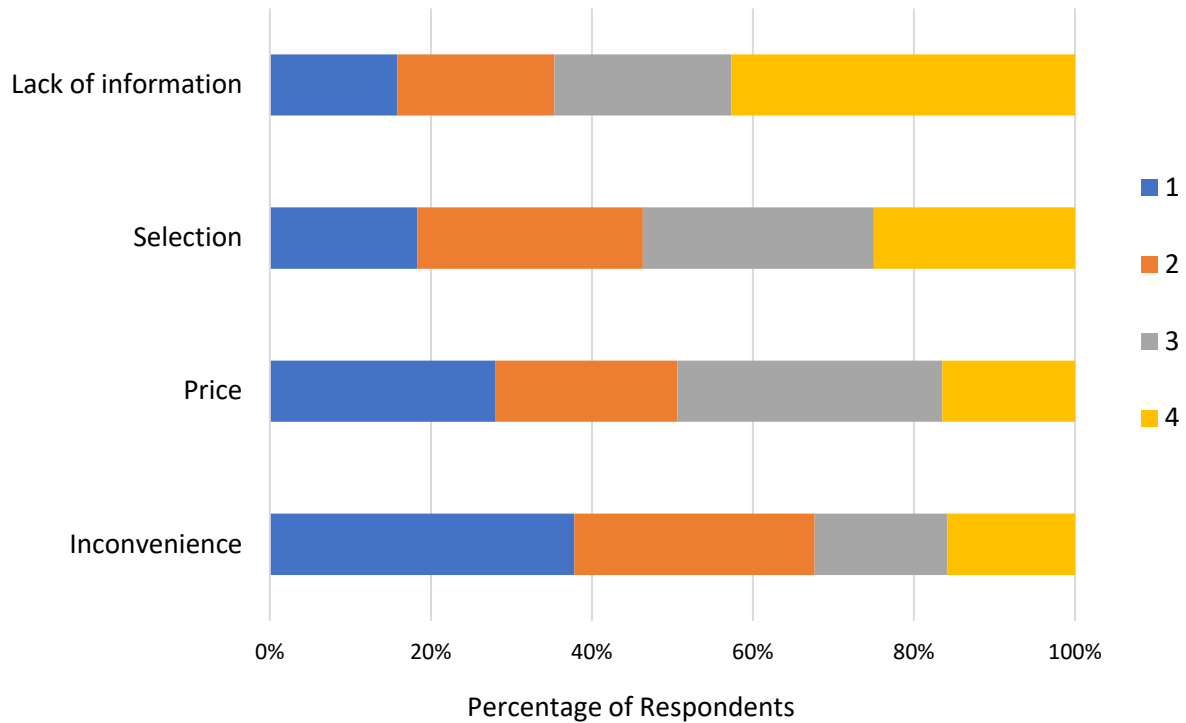
- We also grow some of our own food. I like knowing the farmer who grew my food.
- The fact that most of it is organically grown by people who care deeply about their products and who also support one another
- The three descriptors above which benefit my family and supporting the agricultural community.
- It must be organic before I will consider buying it. Many of the farmers at the local do not raise organic foods.
- I like to know where fruits/vegetables/meats, etc. come from.
- It tastes better. I like supporting my local area and reducing my impact on the earth
- That it supports local business and doesn't use a lot of energy or packaging to get it to market.
- Can find older varieties. Support local families and farmers the concept of home grown
- 50-pound bag of horse feed made locally is \$12.50, not made locally is \$18 to \$20.
- Lower environmental impact due to shorter transport, less long-term storage, ability to eat in season.
- Better for the environment to buy local, know where food is coming from, support neighbors, tastes fresher.
- Local people having their own occupation; utilizing their land resource.
- Lower carbon footprint, support for local farmers/farms, most likely to be clean/cleaner
- That it is usually healthy fruits & vegetables, and that I'm supporting local farmers.
- Supporting local farmers and knowing where my food is coming from
- It's local to me. Yoder's butter, bread, potato salad...
- Easily traceable to the farm it came from and I may know the farmer.

Which of the following benefits would make you more likely to buy local food?



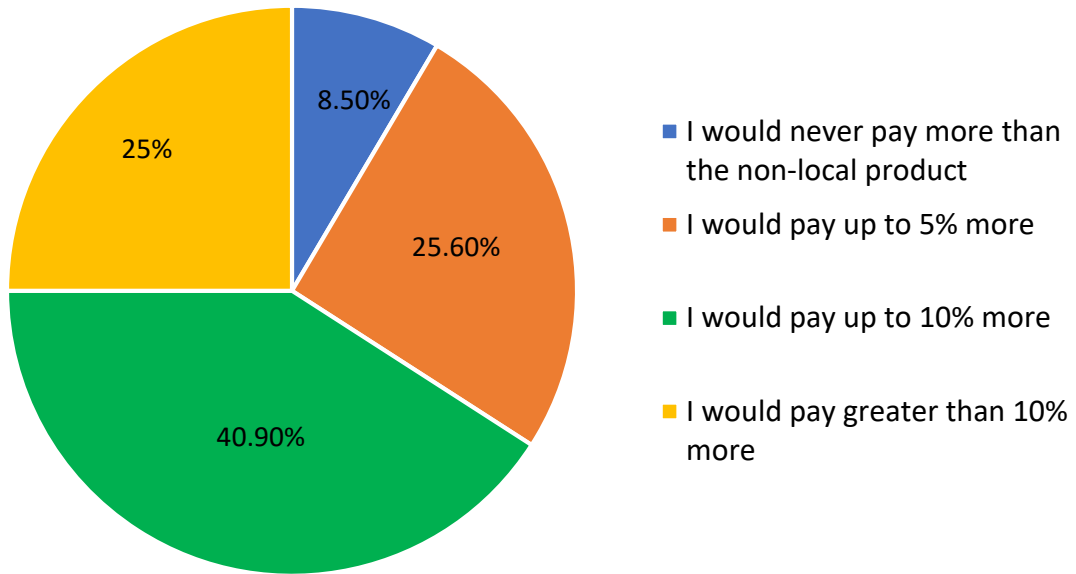
Answer Options	Much more likely	Somewhat more likely	No effect	Rating Average	Response Count
Tastes Better	142	35	4	1.76	181
Fresher	150	28	1	1.83	179
Better for the environment	118	44	15	1.58	177
Supports the local economy	152	28	0	1.84	180
Supports your neighbors' farm/business/job	155	25	0	1.86	180
Preserves the community's rural character	132	43	5	1.71	180
Preserves local heritage	109	54	16	1.52	179
Allows consumers to know where their food comes from	136	36	9	1.70	181
Part of a healthy lifestyle	128	39	13	1.64	180
Other (please specify)					17
<i>answered question</i>					181
<i>skipped question</i>					5

**What is your greatest obstacle to buying locally-grown food?
(please rank the following with 1 being the greatest)**



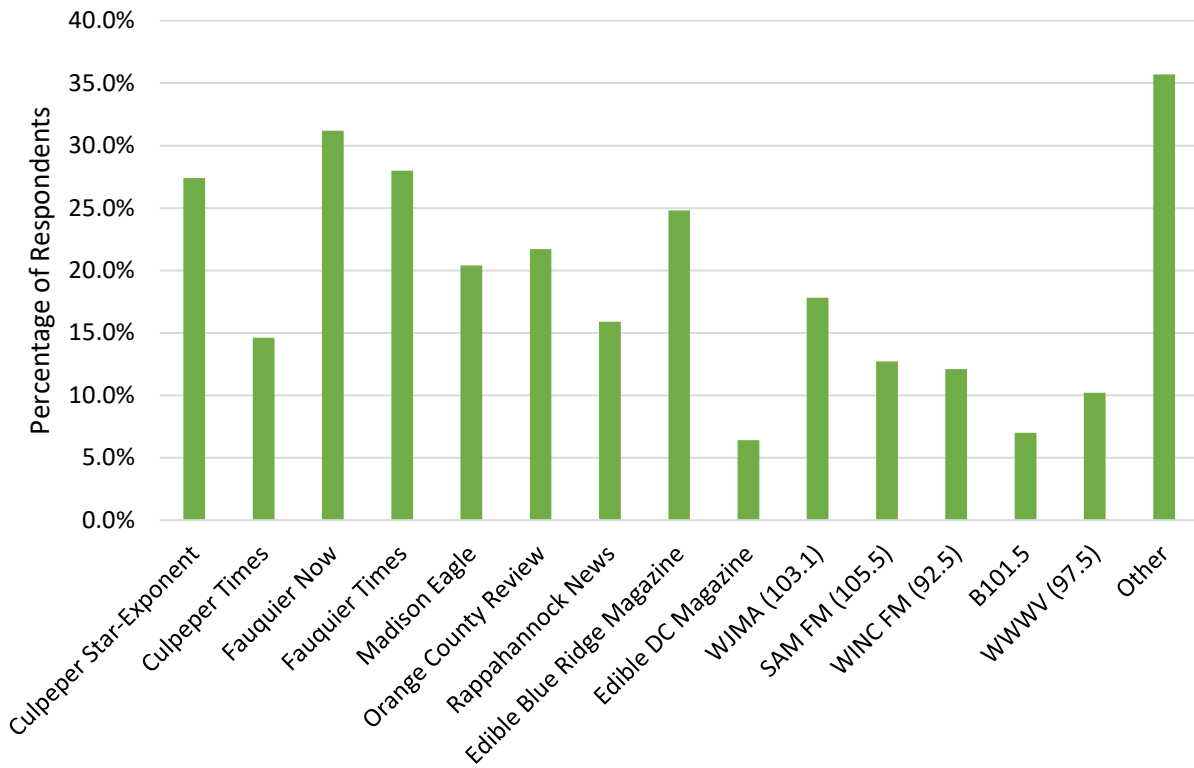
Answer Options	1	2	3	4	Rating Average	Response Count
Inconvenience	62	46	30	26	2.12	164
Price	49	37	46	32	2.37	164
Selection	27	54	47	36	2.56	164
Lack of information	26	27	41	70	2.95	164
<i>answered question</i>						164
<i>skipped question</i>						22

Would you spend more for Local Food, and if so how much?



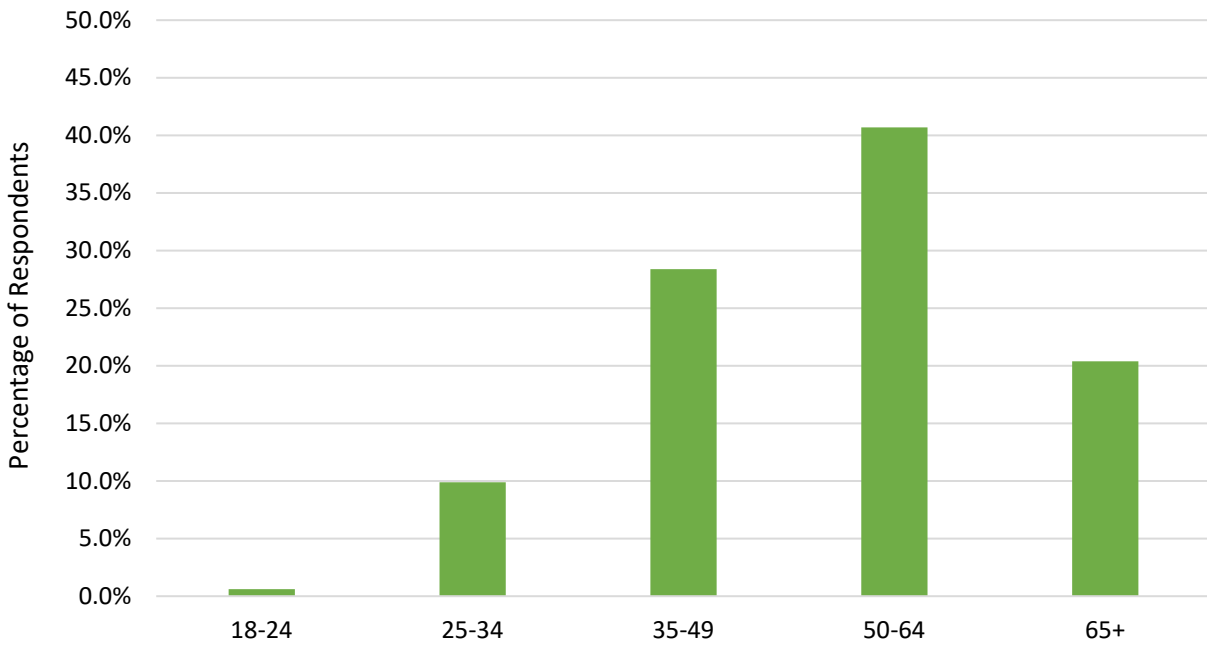
Answer Options	Response Percent	Response Count
I would never pay more than the non-local product	8.5%	14
I would pay up to 5% more	25.6%	42
I would pay up to 10% more	40.9%	67
I would pay greater than 10% more	25.0%	41
<i>answered question</i>		164
<i>skipped question</i>		22

**Which of the following do you read or listen to?
(Check all that apply)**



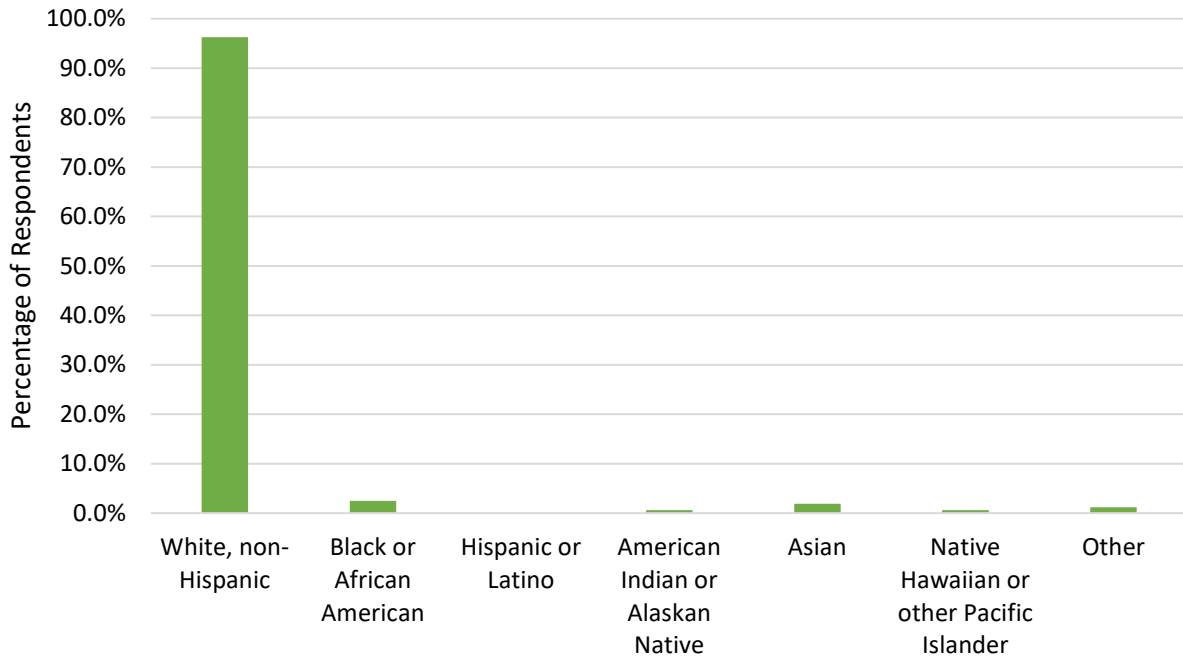
Answer Options	Response Percent	Response Count
Culpeper Star-Exponent	27.4%	43
Culpeper Times	14.6%	23
Fauquier Now	31.2%	49
Fauquier Times	28.0%	44
Madison Eagle	20.4%	32
Orange County Review	21.7%	34
Rappahannock News	15.9%	25
Edible Blue Ridge Magazine	24.8%	39
Edible DC Magazine	6.4%	10
WJMA (103.1)	17.8%	28
SAM FM (105.5)	12.7%	20
WINC FM (92.5)	12.1%	19
B101.5	7.0%	11
WWWV (97.5)	10.2%	16
Other (please specify)	35.7%	56
<i>answered question</i>		157
<i>skipped question</i>		29

What is your age?



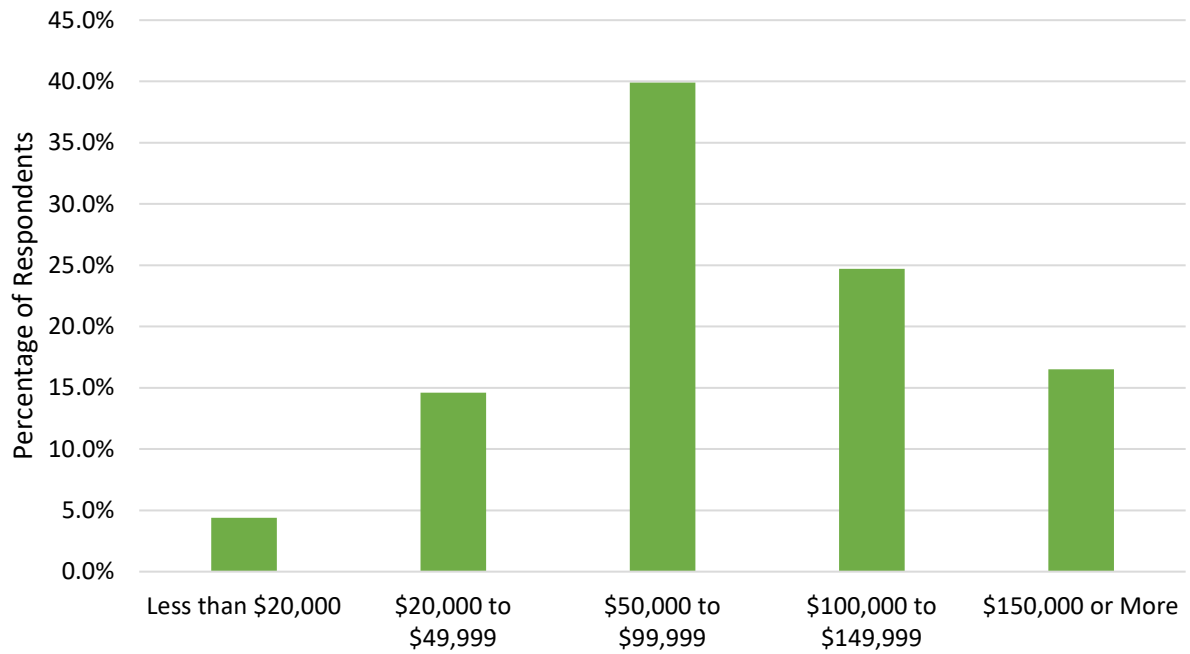
Answer Options	Response Percent	Response Count
18-24	0.6%	1
25-34	9.9%	16
35-49	28.4%	46
50-64	40.7%	66
65+	20.4%	33
<i>answered question</i>		162
<i>skipped question</i>		24

**To which race or ethnicity do you identify?
(Check all that apply)**



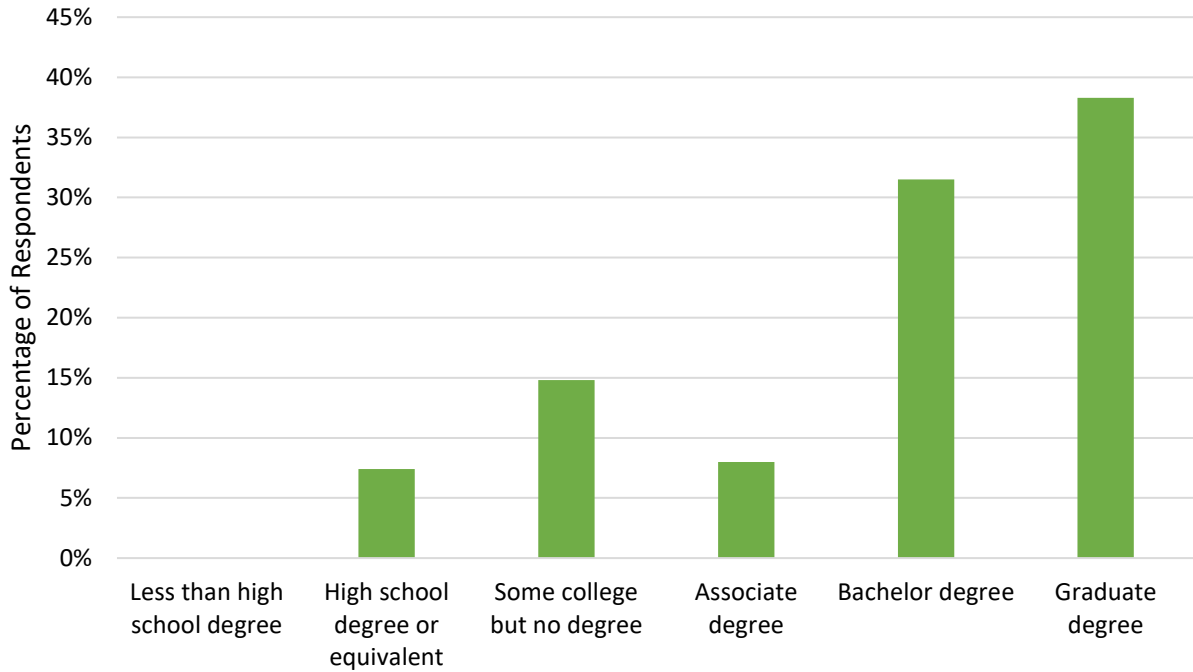
Answer Options	Response Percent	Response Count
White, non-Hispanic	96.3%	156
Black or African-American	2.5%	4
Hispanic or Latino	0.0%	0
American Indian or Alaskan Native	0.6%	1
Asian	1.9%	3
Native Hawaiian or other Pacific Islander	0.6%	1
Other	1.2%	2
<i>answered question</i>		162
<i>skipped question</i>		24

What is your annual household income level?



Answer Options	Response Percent	Response Count
Less than \$20,000	4.4%	7
\$20,000 to \$49,999	14.6%	23
\$50,000 to \$99,999	39.9%	63
\$100,000 to \$149,999	24.7%	39
\$150,000 or More	16.5%	26
<i>answered question</i>		158
<i>skipped question</i>		28

What is the highest level of school you have completed?



Answer Options	Response Percent	Response Count
Less than high school degree	0.0%	0
High school degree or equivalent	7.4%	12
Some college but no degree	14.8%	24
Associate degree	8.0%	13
Bachelor degree	31.5%	51
Graduate degree	38.3%	62
<i>answered question</i>		162
<i>skipped question</i>		24