Meat and Poultry Buying at Farmers' Markets:

A Survey of Shoppers at Four Markets in Oregon

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Introduction

Farmers' markets can be a valuable direct marketing channel: market shoppers are often willing to pay more than supermarket prices because they value the freshness of the food and the connection with producers (Govindasamy, Italia, & Adelaja, 2002; Hardesty, 2008). Vegetables, fruit, flowers, and value-added products such as baked goods, pickles, and jam dominate U. S. market sales (USDA, 2006). Meat and poultry vendors have expanded in recent years but typically represent a very small proportion of market sales and are not present at many markets: only 3.2% of all U.S. farmers' market vendors sell meat and/or poultry and these products are sold at 45% of all markets (USDA, 2006). Sales data from the Portland Farmers Market (PSU), one of the largest markets in Oregon, show meat sales (including poultry) as 7.7% of total revenue (Barney & Worth, Inc., 2008).

Consumer surveys have identified an array of factors that influence purchases of "niche" meats like natural beef and pork (Grannis & Thilmany, 2002; Thilmany, Umberger, & Ziehl, 2006), yet these studies do not focus on the challenges of specific market channels, such as farmers' markets. Before meat and poultry vendors attempt to expand their farmers' market share, it is important for them to know why sales are so far limited, if that trend can be reversed, and if so, how. To answer these questions, we conducted research on the meat and poultry buying habits of farmers' market shoppers. Our study demonstrates the value of a simple and inexpensive research technique that collects targeted information from a large number of consumers and provides useful and rapid results.

Methods

We conducted Rapid Market Assessment "dot" surveys (Lev, Stephenson, & Brewer, 2007; Lev & Stephenson, 1999) at four markets in Oregon during July 2009 (Table 1). We asked shopping groups (one or more adults shopping from a single wallet) to answer four multiple-choice questions, each written on a large poster displayed on an easel. Participants used dots to select their answers. In addition, we conducted follow-up interviews with some participants to learn more about concerns about buying meat and poultry at markets. More than 250 respondents participated at each market, with more than 1600 overall, giving us a high level of confidence that the data accurately represents shoppers in all four markets.

Table 1: Oregon Markets Surveyed

Market	Day/time	Date of survey	# of vendors (# meat & poultry)	Survey respondents
Corvallis	Weds. 3pm-7pm	July 1, 2009	41 (3)	523
Montavilla (Portland metro)	Sun. 10am-2pm	July 26, 2009	30 (2)	339
Ashland	Tues. 8:30am-1:30pm	July 28, 2009	61 (5)	494
McMinnville	Thurs. 1:30pm-6pm	July 30, 2009	50 (3)	275

We selected markets for a fairly broad geographic scope within Oregon, choosing only those with at least two meat and/or poultry vendors, i.e. shoppers had options to purchase meat or poultry. Thirteen of the 181 vendors in the four markets (7.1%) sell meat and/or poultry. If their sales were at the average for other vendors, meat and poultry sales would be 7%. This, with the PSU data, shows the relatively low profile of meat sales in markets and highlights the potential for growth.

The following tables combine our data and provide responses for both the individual markets and the overall sample. Since the number of respondents in each market depended on the size of the research team at that market, we chose to use the percentage of responses for each market, rather than the raw data, to calculate overall sample averages. (If we had chosen to use the raw numbers in calculating averages, the markets with more responses would have been over-weighted in the sample). The relative consistency of answers across markets suggests we might find similar results in other markets.

Results and Discussion

We asked respondents how much they spent at the market that day. Reported spending was fairly evenly spread from $5 to $40. Spending per shopping group ranged from just over $18 in Corvallis to just under $25 in Ashland, with an overall sample average of $21.03. Thirty percent of respondents reported spending $30 or more.

Table 2: How Much Did You/Will You Spend at the Market Today?

	Corvallis	Ashland	Montavilla	McMinnville	Average
Average spending	$18.06	$24.95	$22.13	$18.96	$21.03
% Respondents who spent $30 or more	24%	40%	33%	24%	30%

N = 1613

Half of all respondents have never purchased any meat or poultry at any farmers' market (Table 3). Approximately one quarter (24%) had purchased only meat, slightly fewer (22%) had purchased both meat and poultry, and very few (4%) had purchased only poultry. In contrast, nearly all market shoppers have purchased fresh produce (Kerr Center, 2001; Govindasamy, Italia, & Adelaja, 2002).

Table 3: Have You Ever Purchased Meat or Poultry at Any Farmers' Market?

Answer	Corvallis	Ashland	Montavilla	McMinnville	Average
Neither	55%	46%	50%	52%	51%
Meat only	13%	30%	29%	21%	24%
Poultry only	7%	4%	3%	3%	4%
Both	26%	20%	18%	24%	22%

N=1627

Even this level of meat purchasing is somewhat surprising: conversations with meat and poultry vendors and general observation of shopper activity at these markets and elsewhere suggest a lower percentage of shoppers purchasing meat or

poultry. Researchers and volunteers told respondents repeatedly that ready-to-eat products – such as a cooked sausage sandwich – did not count for this question; it is possible that some people did not hear, did not understand, or ignored this direction. Whatever the exact percentage, the central conclusion is that meat and poultry are only viewed as items of interest by some shoppers.

The next survey question focused on what limited market purchases of meat and poultry. Corvallis was surveyed first, and the results led to two changes for the other markets: eliminating "taste" as an answer (chosen by only 1% of respondents) and adding "inconvenient," a theme that emerged from follow up interviews.

Nineteen percent of respondents indicated that they don't consume meat and poultry, which seems reasonable given national trends: about 3% of the US population is vegetarian, and 8% never eat meat (VRG, 2009).

Table 4: What MOST Limits Your Meat & Poultry Purchases at Farmers' Markets? (Choose Only One)

Answer	Corvallis	Ashland	Montavilla	McMinnville	Average
Price	38%	31%	32%	21%	31%
Don't eat it	21%	21%	24%	11%	19%
Inconvenient	NA	16%	14%	20%	17%
Buy lots	9%	13%	12%	17%	13%
Food safety	17%	8%	8%	19%	13%
Can't get cuts I want	5%	5%	6%	6%	5%
Buy from farmer elsewhere	9%	6%	3%	6%	6%
Taste	1%	NA	NA	NA	1%

N=1572

The top three reasons meat and poultry eaters did not buy more (or any) at the farmers' market were (1) it costs too much, (2) inconvenience, and (3) food safety concerns (Table 4). Price was the most common response at all four markets, though just barely at McMinnville.

In previous Oregon research on purchase limitations at markets (e.g. Lev and Stephenson, 2002; Brewer, Lev, & Stephenson, 2005), price has never topped 10%: clearly meats are different. Farmers' market prices are often substantially above supermarket prices for conventional or even "niche" meats. As one shopper said, "Free-range chicken is cheaper at the [local food] co-op."

Inconvenience was the second most cited limitation. Shoppers said they were not prepared to buy meat: "If you don't think ahead and bring a cooler with ice, you can't buy it here." They were afraid to carry it around, unrefrigerated, on a hot day, especially if they were not going straight home: "It's not that I think the product is unsafe…I think it's going to spoil. What happens if I walk around with it on a 90 degree day?"

Food safety concerns, ranked third, reflect a reluctance to buy these products

at an open air market. This overlaps with inconvenience but with a different tone. Shoppers expressed skepticism about vendors' refrigeration methods at the market and/or en route. "Were they really careful bringing it here, or did they cut corners?" asked one. "How can they display it without having it go bad?"

Although all meat and poultry vendors keep their products on ice, e.g. in display baskets or coolers, and must follow Oregon Department of Agriculture (ODA) food safety regulations, shoppers are not always convinced. "I'm concerned about handling, temperature control," said one. "How can you do that just with coolers?" Another said she wouldn't buy whole chickens she'd seen that day on ice in an open cooler in the sun: "I don't know if there's any oversight."

Food safety is also a challenge for vendors in product display. Fruit and vegetables are out where shoppers can see them. Many meat and poultry vendors rely solely on signage to attract customers and pull products, from the cooler only on request. As one shopper complained, "the meat is down in a cooler, so I can't see it." Yet, as noted, other shoppers may shy away if meat is displayed.

The 19% of shoppers who responded either "buy from farmer elsewhere" or "buy lots" represent the core local meat customers. Two common ways to buy from a farmer "elsewhere" are through local retailers who feature identity-preserved meats and "on the hoof" sales, typically by the whole, half, or quarter animal.

Finally, we examined the price premium, if any, that shoppers would pay for meat and poultry at the market versus "non-local" meat and poultry at the supermarket. (Respondents who do not eat meat or poultry were told to skip this question.) This question was also altered after the Corvallis survey, but in this case, that survey's results are not presented.

Table 5: If Non-Local Meat & Poultry Costs $4/Lb at the Supermarket, What Would You Pay For Local Meat Here?

Answer	Ashland	Montavilla	McMinnville	Average
No premium	14%	6%	23%	14%
$4.50	23%	16%	21%	20%
$5.00	38%	43%	25%	35%
$5.50	8%	18%	15%	14%
$6.00	12%	14%	12%	13%
$7.00	3%	2%	2%	2%
$8.00	1%	2%	1%	2%

N=918

Eighty-six percent of respondents were willing to pay more for local meat and poultry at a farmers' market. However, there was fairly wide variation among markets, from a high of 94% to a low of 77%. Thirty-five percent said they would pay an extra dollar per pound, and 13% would pay two extra dollars per pound, but very few (4%) were willing to pay more.

Vendors might be encouraged that such a high percentage of shoppers will pay some premium. However $1 or $2/lb extra may not be enough for vendors to cover costs and make even a minimal profit, given typically more costly production practices (e.g. organic, grass-fed), small volumes, and supply chain challenges (e.g. distances to/cost of processing).

Conclusions and Recommendations

"Center of the plate" products like meat and poultry have been a major growth area at farmers' markets over the last decade. We document what many vendors and market managers already know: further expansion of meat and poultry sales at markets will require overcoming multiple challenges, especially pricing constraints, relative inconvenience compared with other market products, and shopper apprehension about the safety of meat and poultry purchased at open air markets, especially on hot days. Few people come prepared to buy these products, e.g. with coolers or cold-packs or a plan to go straight home. Many do not trust that purchases will not spoil on the way home.

The core meat and poultry buying group, while loyal and enthusiastic, is relatively small so far. They also may be purchasing in smaller volumes than the average supermarket consumer. "Meat's like a treat," a shopper explained. "We buy it from a local farmer if we buy it at all." How can this group be expanded?

While price is important for many shoppers, vendors must recognize and appreciate the range of concerns that this study has uncovered. Specifically, food safety and inconvenience, when considered jointly, rank just as highly as price as a constraint on purchases. We suggest four ways to encourage more meat and poultry sales at farmers' markets:

- **"Cowpool" Discounts:** encourage shoppers to buy shares (half, quarter, eighth) of a live animal, "on-the-hoof," at a discount off the individual cut price, with "how to" guides (e.g. Iowa State University's Beef and Pork Whole Animal Buying Guide, (SMPWG, 2008)), and cost comparisons.

- **Keeping It Cool:** teach shoppers to plan ahead and bring a cooler or cold-packs, and/or make the market their last stop. Posters at the market booth/vendor booths could offer guidance for keeping purchases cold. Vendors could offer re-usable, insulated bags – with farm logo – to attract and keep customers.

- **Why It's Safe:** provide shoppers with information on the specific practices vendors use to keep meat and poultry cold and safe. Posters could be produced by OSU, in collaboration with ODA's Food Safety division.

- **Meet Your Meat:** plan a chef demo featuring the meat and poultry at that market, to teach shoppers appropriate cooking methods, pairing with seasonal produce. Vendors can describe their farms and production practices.

These strategies require resources, both human and financial, and it will take time for shoppers to change long ingrained buying habits and expectations. Vendors, market managers and staff, market boards of directors, volunteers, and many others

have worked hard to make farmers' markets in Oregon as successful as they are. By building on those efforts, we can make meat and poultry more popular market fare.

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