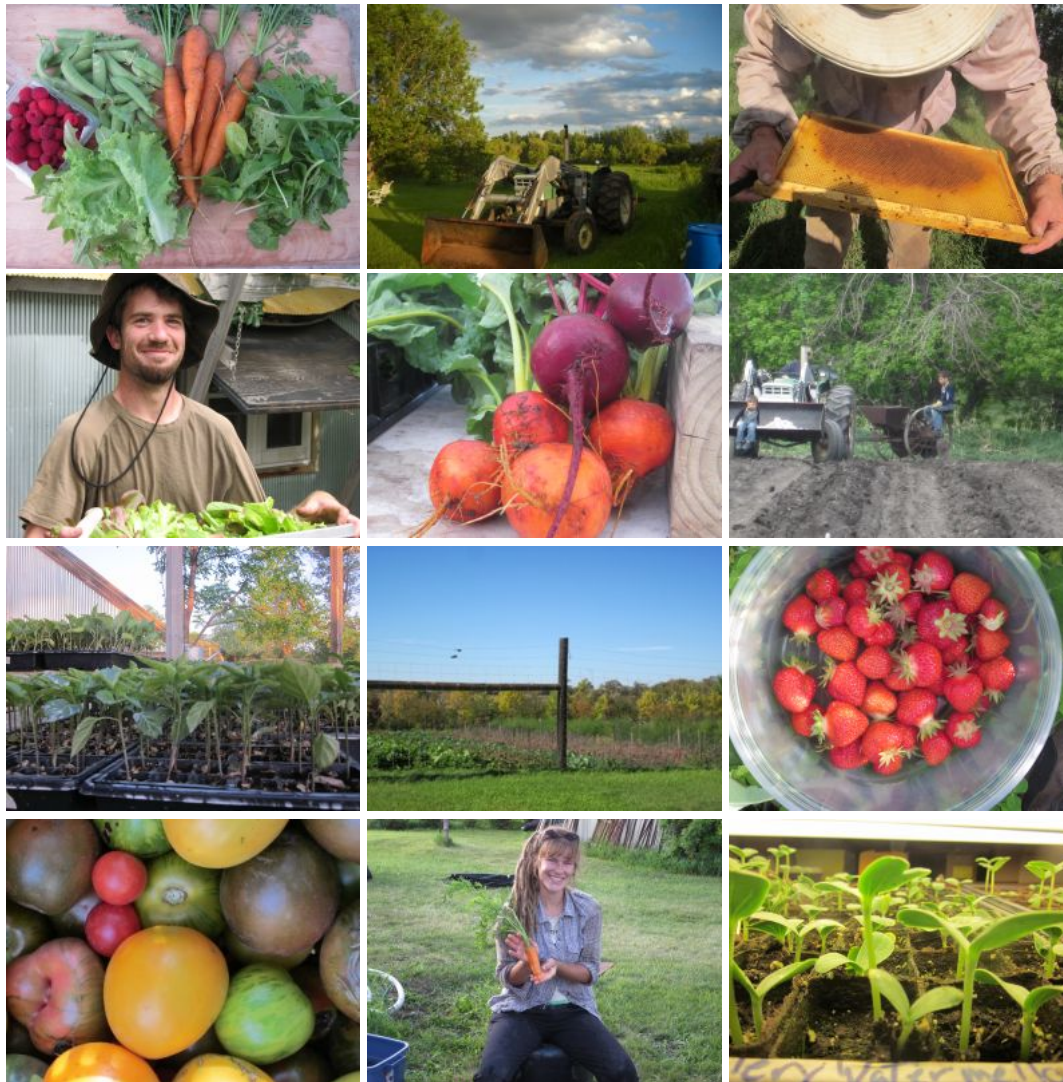


Growers' Motivations: 2013 Survey Results

Results of a February 2013 survey of small farm and specialty crop producers in Becker, Clay, Otter Tail, and Wilkin counties in Minnesota and Cass County, North Dakota

November
2013



Photos courtesy of Red Goose Gardens, CSA, Shelly, MN

The Center for Social Research at North Dakota State University,
an Equal Opportunity Institution

NDSU NORTH DAKOTA
STATE UNIVERSITY

INTRODUCTION

This report, entitled *Growers' Motivations: 2013 Survey Results*, presents the results of a February 2013 survey of small farm and specialty crop producers in Becker, Clay, Otter Tail, and Wilkin counties in Minnesota and Cass County in North Dakota.

This study was conducted by the Center for Social Research at North Dakota State University in collaboration with the University of Minnesota Extension on behalf of PartnerSHIP 4 Health, a grantee of the Minnesota Statewide Health Improvement Program (SHIP) serving Becker, Clay, Otter Tail, and Wilkin counties in Minnesota. Funding for the study was provided by a SHIP grant through the Minnesota Department of Health as a part of the 2008 Health Care Reform Legislation in Minnesota. For more information about SHIP, please visit: www.health.state.mn.us/healthreform/ship/.

The Center for Social Research would like to thank Ryan Pesch and the University of Minnesota Extension for the use of their survey tool.

Publication date:
November 2013

Author

Jennie Lazarus, Center for Social Research at NDSU

Contributors

Dr. Richard Rathge, Center for Social Research at NDSU

Ramona Danielson, Center for Social Research at NDSU

Gina Nolte, PartnerSHIP 4 Health

Karen Olson, Center for Social Research at NDSU

Ryan Pesch, University of Minnesota Extension

Kay Schwarzwalter, Center for Social Research at NDSU

TABLE OF CONTENTS

INTRODUCTION	3
EXECUTIVE SUMMARY	5
Introduction	5
Study Design and Methodology.....	5
Summary of Survey Results	6
SURVEY RESULTS.....	7-25
Production and Distribution	7
Future Plans	15
Personal Characteristics.....	23
APPENDICES	26-41
Appendix Tables.....	26
Survey Cover Letter.....	38
Survey Instrument.....	39

EXECUTIVE SUMMARY

Introduction

The key objective of this study is for PartnerSHIP 4 Health (PS4H) to gain knowledge about the types of products being produced by small farm and specialty crop producers in the west-central Minnesota four-county area of Becker, Clay, Otter Tail, and Wilkin. We also hope to understand limitations and barriers to production. These efforts will be used to evaluate the producers' interest and ability to supply products to consumer venues including Farm to School programs as well as institutions such as hospitals and nursing homes in the four-county region.

Study Design and Methodology

The staff at the Center for Social Research at North Dakota State University worked closely with the staff from University of Minnesota Extension and PS4H to develop the survey instrument. Upon approval from the North Dakota State University Institutional Review Board, a total of 83 surveys were mailed to small farm and specialty crop producers in west-central Minnesota and east-central North Dakota. The survey was composed of 20 questions and took approximately 15 minutes to complete. Cass Clay Food Systems Initiative (CCFSI) supplied the list of producers for the mailing.

CCFSI was initiated early in 2011 by members of the University of Minnesota Extension Service, North Dakota State University and Cass County Extension Service, Fargo Cass Public Health, and Clay County Public Health. The goal of the Initiative is to increase access to safe, nutritious, and affordable food for area residents by strengthening all aspects of the local food system. Members of the Initiative compiled a list of producers using a variety of sources (i.e., USDA website, talking to farmers at meetings, farmers' markets, phone calls, word of mouth). The list is updated by Fargo Cass Public Health. PS4H and CCFSI have an established relationship because of a shared common goal surrounding food access issues.

While this study focuses on the four-county region in Minnesota, the surveys were also mailed to producers from Cass County, North Dakota that were listed in the sample because of their participation in farmers' markets within the area of study. Data collection occurred in February 2013. A total of 35 completed surveys were returned for a response rate of 42 percent. Because the sample was not chosen randomly and may have unintentionally left out some producers, some caution should be used when interpreting the data.

Key findings are presented in the main body of this report and are supplemented with Appendix Table 19 containing additional comments from respondents regarding their experiences with marketing and distributing foods in the region. The findings have been categorized according to the following themes: *Production and Distribution*, *Future Plans*, and *Personal Characteristics*. Appendix Tables representing survey data results have also been included. The survey cover letter and instrument are provided at the end of this report. Questions related to marketing were excluded from this report and will be analyzed separately.

Summary of Survey Results

Growers are currently selling most often through consumer-direct venues, such as farmers' markets, and plan to continue in the future.

The majority of growers indicated that they are currently selling their products through an on-site venue such as a farm stand or U-pick settings (57.1 percent). Nearly half of respondents sell through a farmers' market setting (48.6 percent). When asked what venues they would be interested in selling to over the next five years, two-thirds of respondents indicated they are interested in selling through on-site venues (68.6 percent) and 57.1 percent of respondents are interested in selling through a farmers' market in the next five years.

Respondents were least likely to currently be selling or be interested in selling their product in the future through wholesale venues such as grower cooperatives or processors and packers.

Growers are looking for reliable customers.

Having reliable customers was ranked as the most important item when deciding why they grow and sell the products they produce (mean=4.29). Growers also ranked highly the ability to increase access to healthy, locally grown food and being able to raise the products of their choosing (mean=4.26 and mean=4.15, respectively).

Meeting buyer specifications is not difficult.

Nearly half of respondents indicated that meeting buyers' specifications is not at all difficult (46.9 percent). Respondents rated production challenges and fuel costs as the most difficult barriers to production.

Respondents are interested in many market venues.

Growers are moderately interested in selling to farmers' markets, community supported agriculture (CSAs), natural food stores or co-operatives, and direct to school venues.

When asked about the likelihood to sell or continue to sell through a Farm to School site in the next five years, 34.3 percent of respondents indicated they were at least somewhat likely to do so. Among those currently selling to Farm to School sites, it is very likely that they will continue to sell to those venues (mean=4.67).

While less than 1 in 10 respondents currently sells directly to institutions (e.g., hospitals, nursing homes), one-fourth is at least somewhat interested in selling to those venues in the next five years.

Growers seek education for themselves and their customers.

When asked what factors would help their farm production the most over the next five years, two-thirds of respondents indicated they would like to see more consumer education about local foods. Nearly half of all respondents would like to have access to education or training topics regarding marketing and how to have their farm information shared with nearby institutions.

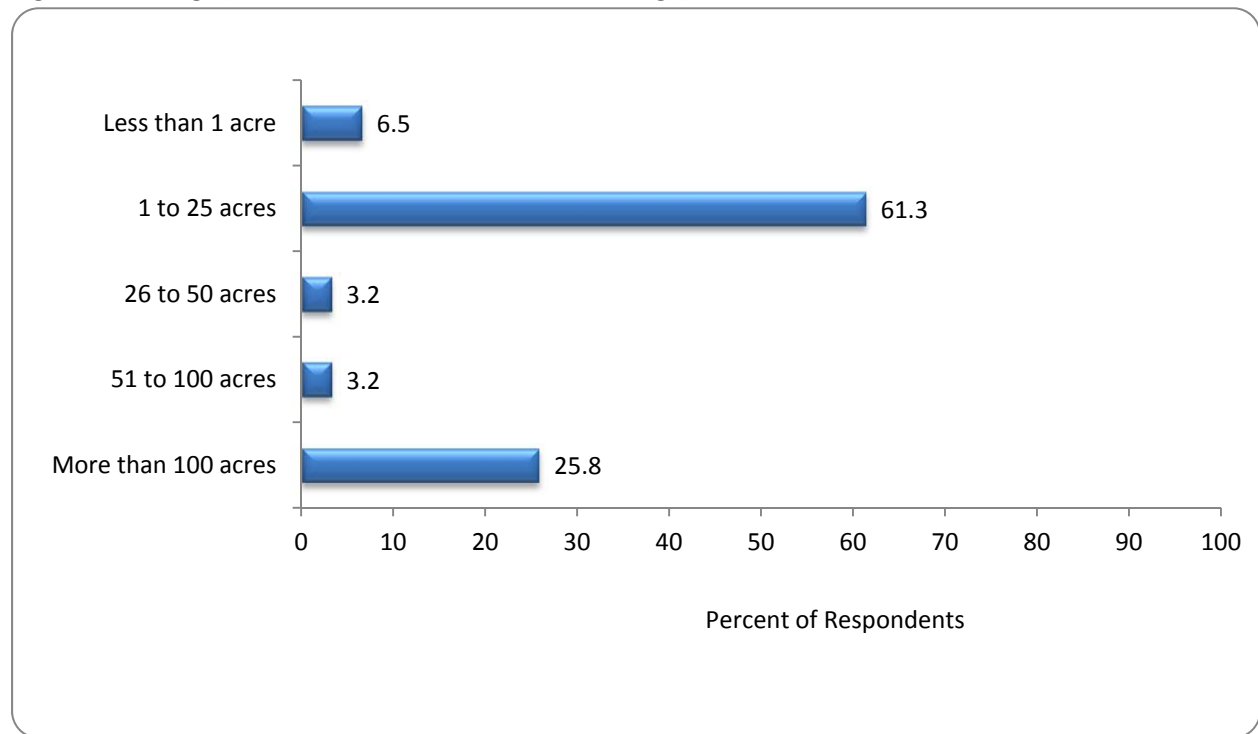
SURVEY RESULTS

Production and Distribution

Respondents were asked how many acres, whether owned, leased, or used free of charge, they farmed the previous year (2012) (*Figure 1, Appendix Table 1*).

- Two-thirds of respondents farmed 25 acres or less (67.8 percent).
- One in four respondents farmed more than 100 acres (25.8 percent).

Figure 1. Acreage (owned, leased, or used free of charge) farmed in 2012

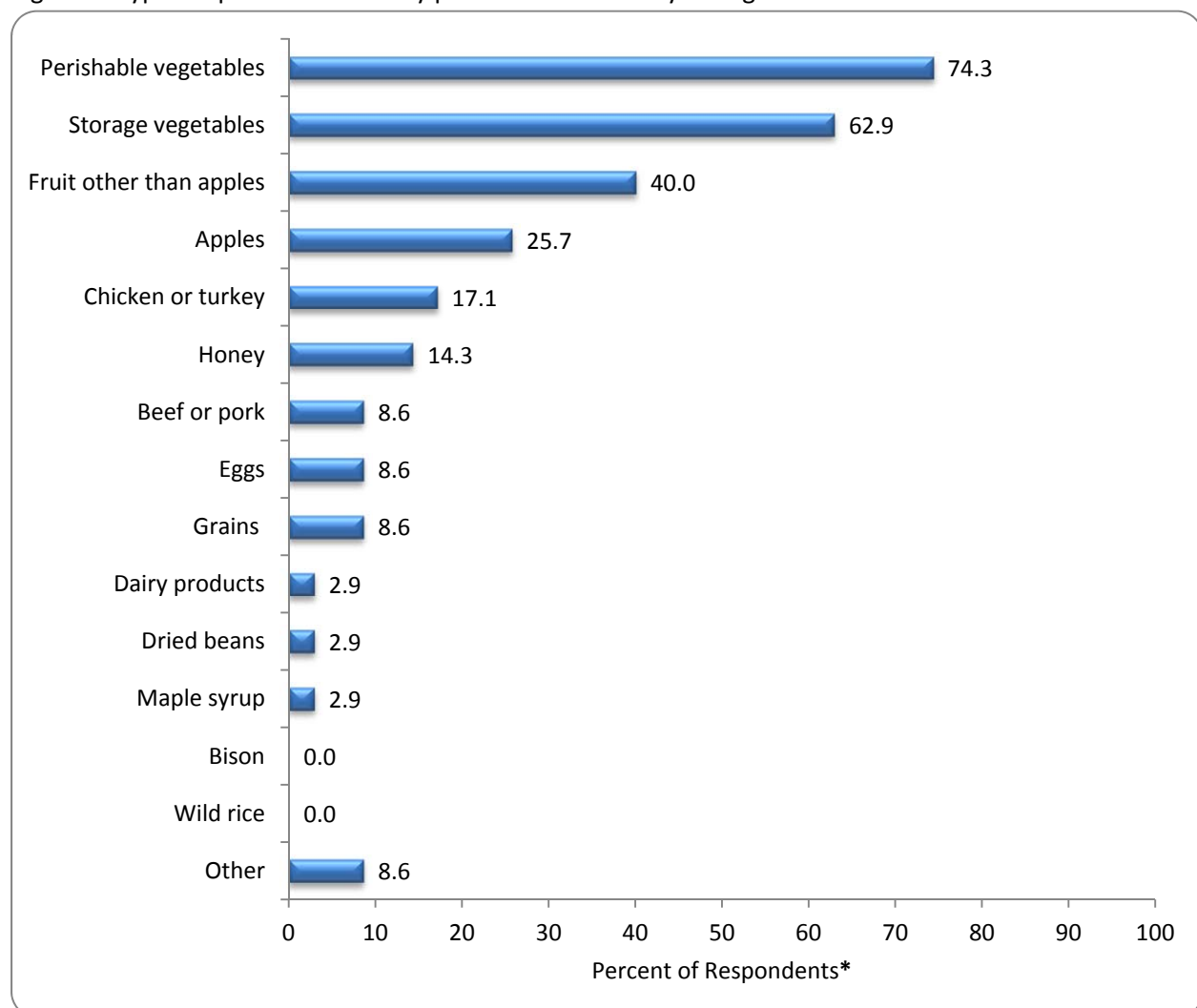


N= 31

Respondents were asked to indicate the products they currently grow and sell (*Figure 2, Appendix Table 2*).

- The majority of respondents indicated they grow and sell perishable vegetables (74.3 percent); 62.9 percent of respondents said they grow and sell storage vegetables.
- Fruit other than apples is being grown and sold by 40.0 percent of the respondents; one-fourth of respondents indicated they produce apples (25.7 percent).
- Nearly one-fifth of respondents indicated they grow and sell chicken or turkey (17.1 percent); 14.3 percent of respondents indicated they produce honey.
- Other products not listed below that respondents indicated they grow include edible flowers, hay, lamb, and queen bees.

Figure 2. Types of products currently produced and sold by area growers



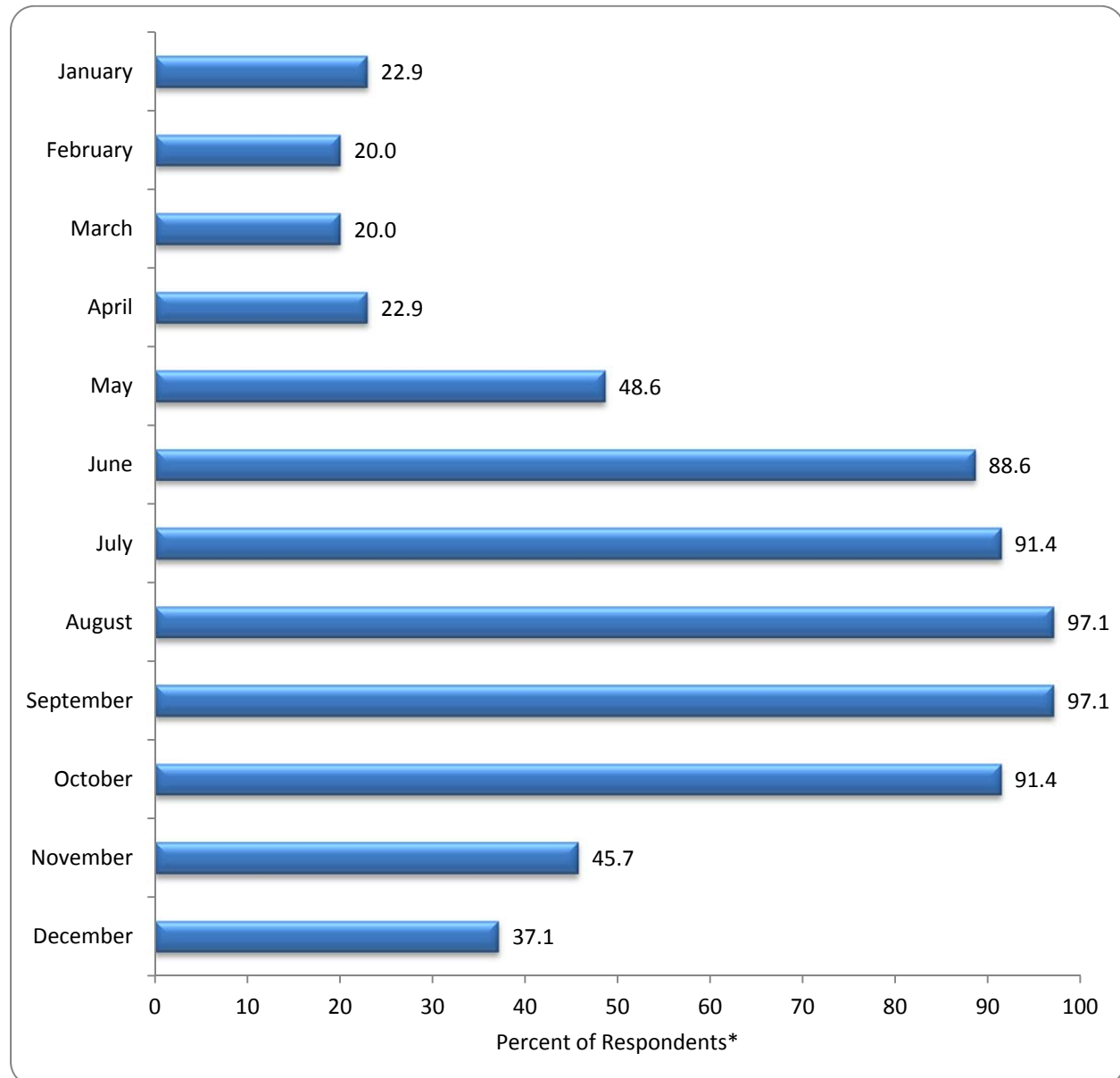
N=35

*Percentages do not total 100.0 due to multiple responses.

Respondents were asked to indicate which months of the year they sell the products they grow (*Figure 3, Appendix Table 3*).

- The vast majority of respondents sell products during the months of June (88.6 percent), July (91.4 percent), August (97.1 percent), September (97.1 percent), and October (91.4 percent).
- Months in which the least number of respondents sell their products are February and March (20.0 percent each).

Figure 3. Months in which products are sold



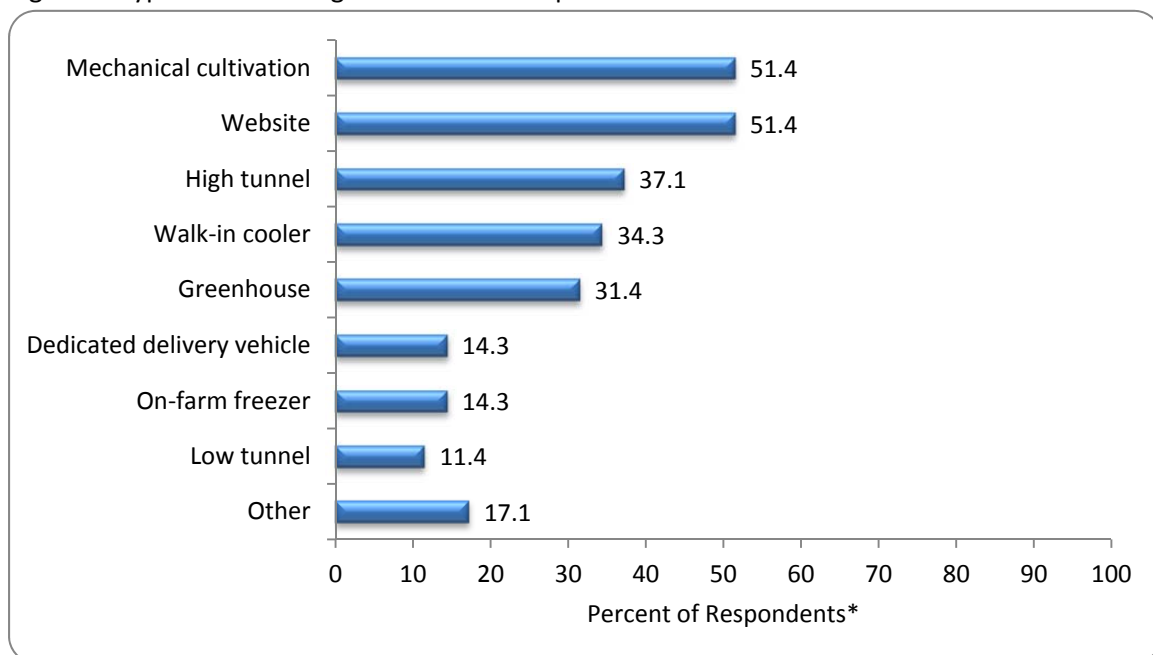
N=35

*Percentages do not total 100.0 due to multiple responses.

Respondents were asked to identify the types of technologies they employ in their farm operation (Figure 4, Appendix Table 4).

- Approximately half of respondents indicated they use mechanical cultivation on their operation (51.4 percent).
- Approximately half of respondents use website technologies on their operation (51.4 percent).
- Approximately one in three respondents uses a high tunnel (37.1 percent), a walk-in cooler (34.3 percent), or a greenhouse (31.4 percent) on their operation.
- Approximately 1 in 10 respondents uses a dedicated delivery vehicle (14.3 percent), an on-farm freezer (14.3 percent), and a low tunnel (11.4 percent) on their operation.
- Other technologies used but not listed include air conditioning, biodynamics, Facebook, grocery store accounts, mulching, and root cellar.

Figure 4. Types of technologies used in farm operation



N=35

*Percentage do not total 100.0 due to multiple responses.

Respondents were asked to indicate venues to which they currently sell (*Figure 5, Appendix Table 7*).

Respondents are currently selling mostly to consumer-direct venues.

- More than half of respondents indicated they currently sell at on-site (farm stand, U-pick) venues (57.1 percent) and nearly half sell through a farmers market (48.6 percent).
- One in five respondents currently sells through a Community Supported Agriculture (CSA) program (22.9 percent).
- Other consumer-direct venues include selling at craft shows and via home or personal delivery.

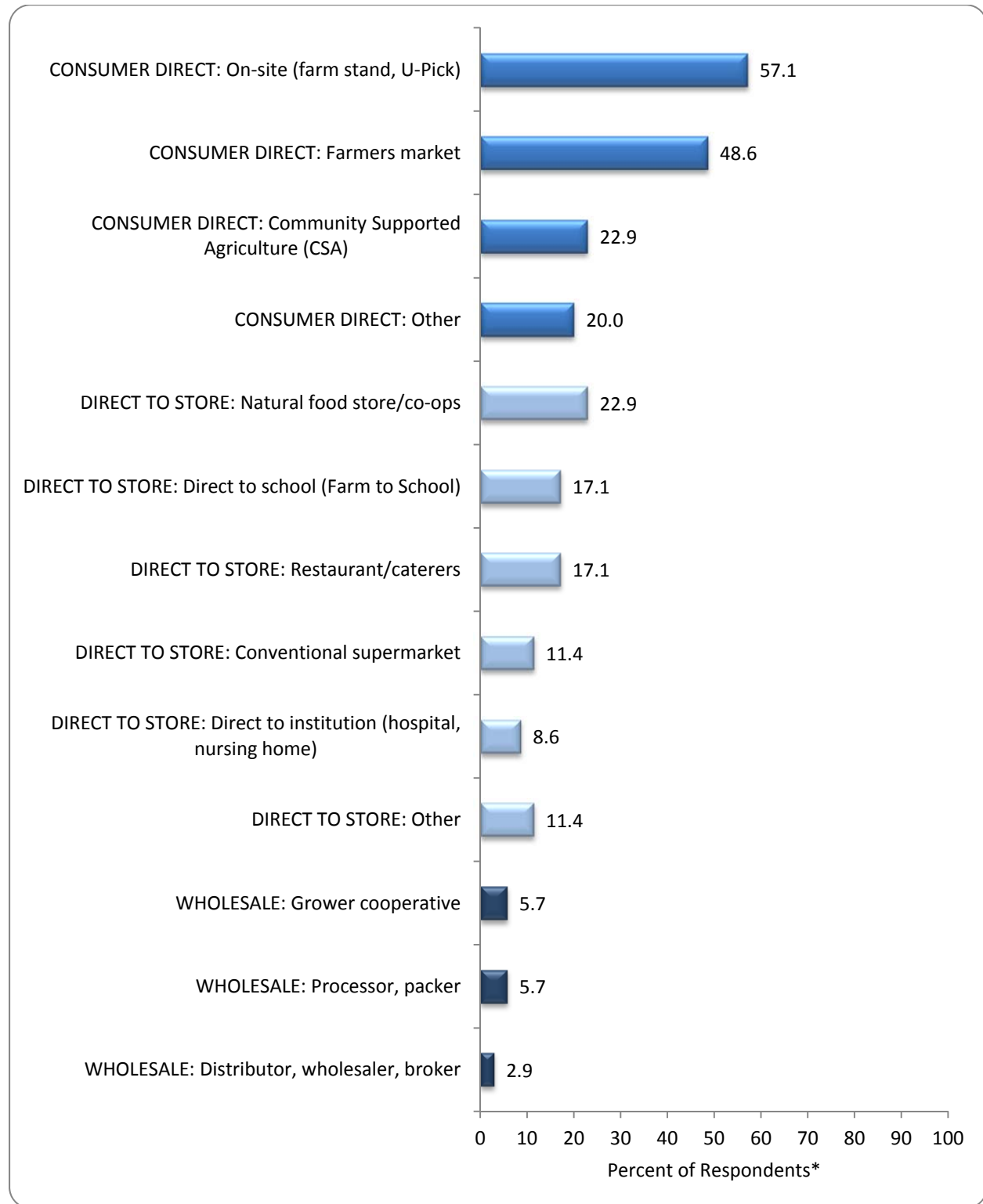
At least 1 in 10 respondents is currently selling directly to stores.

- Approximately one in five respondents indicated they currently sell to a natural food store or cooperative (22.9 percent), direct to schools (17.1 percent), and restaurant/caterers (17.1 percent).
- Approximately 1 in 10 respondents indicated they currently sell to conventional supermarkets (11.4 percent) and direct to an institution (hospital, nursing home) (8.6 percent).
- Other direct to store venues include giving to charity, gift shops, and produce markets.

Less than 1 in 10 respondents currently sells to wholesale venues.

- Approximately 1 in 17 respondents indicated they currently sell to grower cooperatives (5.7 percent); processors and packers (5.7 percent); and distributor, wholesale, or broker venues (2.9 percent).

Figure 5. Venues to which respondents currently sell their products



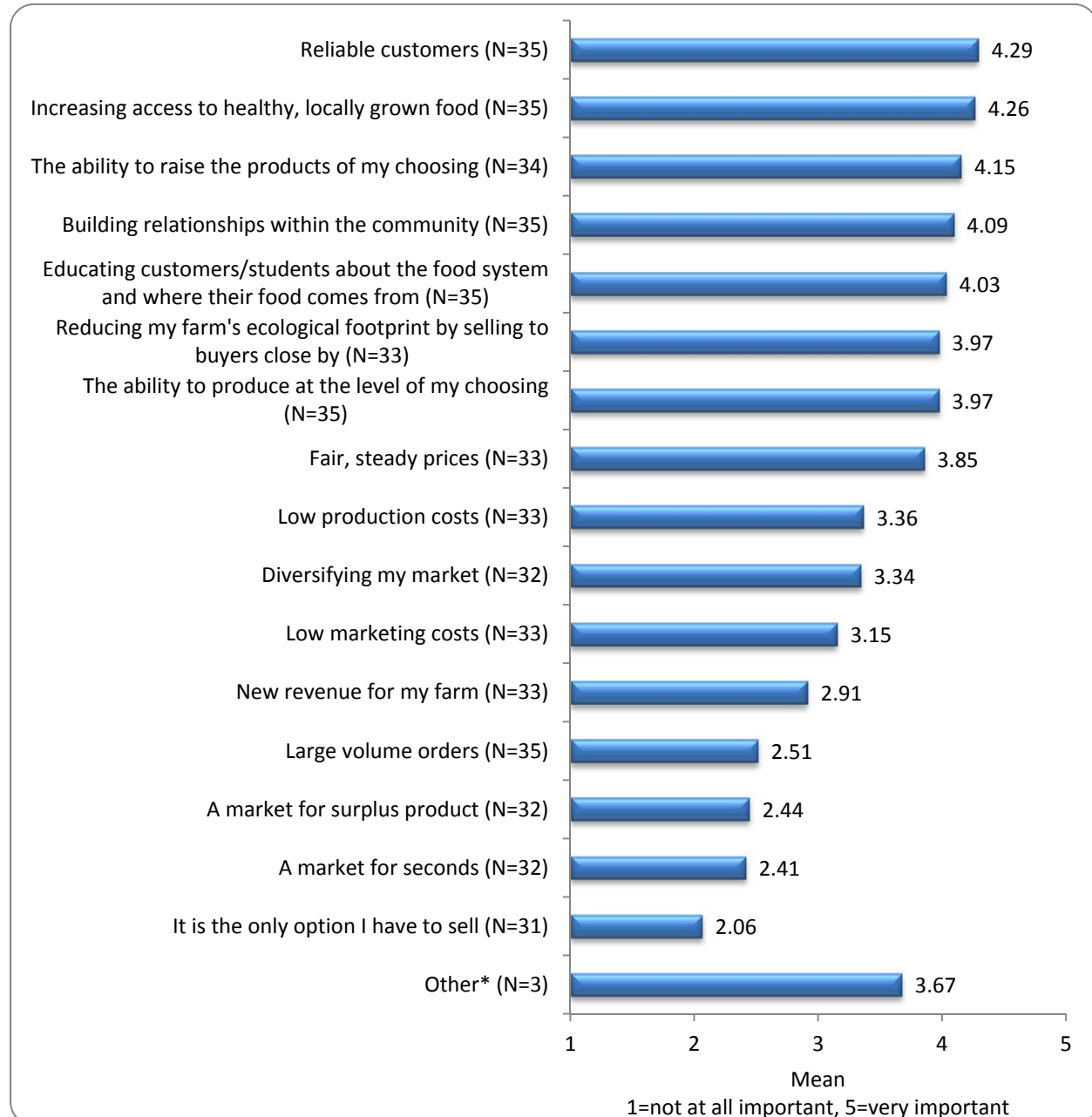
N=35

*Percent does not total 100.0 due to multiple responses.

Respondents were asked to rate the importance of various items when deciding why they grow and sell the products they produce (responses are based on a one to five scale with one being “not at all important” and five being “very important”) (Figure 6, Appendix Table 5).

- On average, respondents indicated that reliable customers (mean=4.29); increasing access to healthy, locally grown food (mean=4.26); and the ability to raise the products of their choosing (mean=4.15) are the most important factors to growing and selling products.

Figure 6. Importance of various factors to growing and selling products

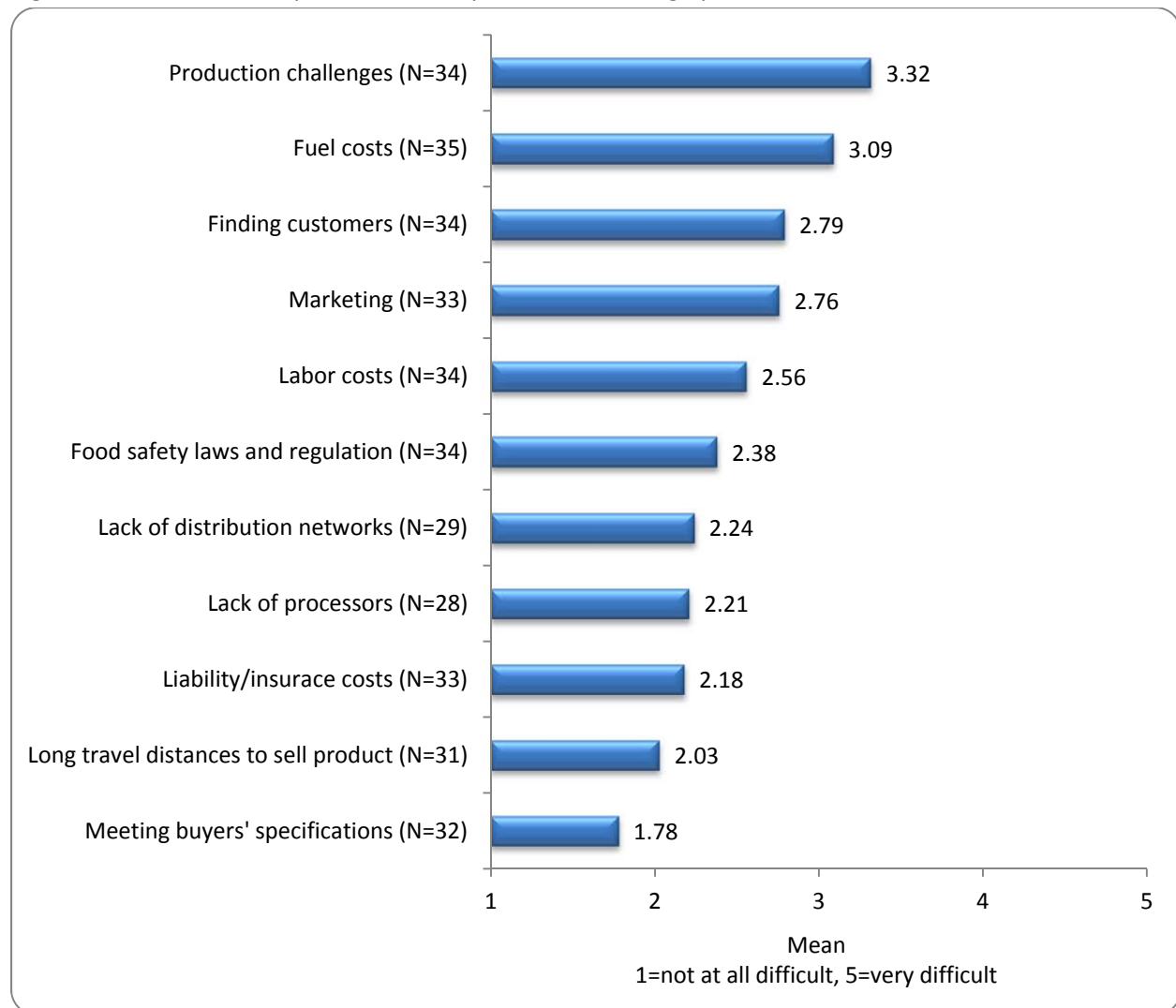


*See Appendix Table 5 for a list of “other” responses.

Respondents were asked to rate the difficulty of various operating issues (responses are based on a one to five scale with one being “not at all difficult” and five being “very difficult”) (Figure 7, Appendix Table 6).

- On average, respondents indicated that production challenges are the most difficult operation issue they are currently facing (mean=3.32).
- On average, respondents said fuel costs (mean=3.09), finding customers (mean=2.79), and marketing (mean=2.76) are somewhat difficult operating issues with growing and selling products.
- On average, respondents indicated that meeting buyer’s specifications is not at all difficult (mean=1.78)

Figure 7. Level of difficulty various issues present to farming operation



Future Plans

Respondents were asked to rate the likelihood that they would sell or continue to sell through CONSUMER DIRECT, DIRECT TO STORE, and WHOLESALE venues in the future (responses are based on a one to five scale with one being “not at all likely” and five being “very likely”).

Due to the manner in which this particular question was asked, the average level of likelihood appears artificially low. Therefore, included in the narrative is the level of likelihood, divided into three parts: those respondents currently selling through the venues, those who are not currently selling through the venues, and all respondents (*Figures 8 and 9, Appendix Tables 7-10.*)

Consumer Direct

- Approximately half of all respondents currently sell products using **on-site (farm stand, U-pick) venues**. This proportion could grow to more than two-thirds of respondents in the future, as 68.6 percent of respondents indicated some likelihood of selling through this venue over the next five years. On average, the likelihood of selling using this venue in the future is 3.14 (currently sell mean= 3.95, do not currently sell mean= 2.07)
- The percent of respondents selling through **farmers’ markets** could increase to over half (57.1 percent). Those selling through **Community Supported Agriculture (CSA)** could increase from one-fifth (22.9 percent) to one-third (34.3 percent) of respondents. On average, the likelihood of selling using this venue in the future is 2.23 (currently sell mean= 5.00, do not currently sell mean=1.41).
- One in five respondents currently sells through **natural food store/co-ops** (22.9 percent). This proportion could grow to nearly half of respondents within the next five years, as 45.7 percent of respondents indicated some likelihood of selling through this venue in the future. On average, the likelihood of selling using this venue in the future is 2.40 (currently sell mean=4.38, do not currently sell mean=1.81).

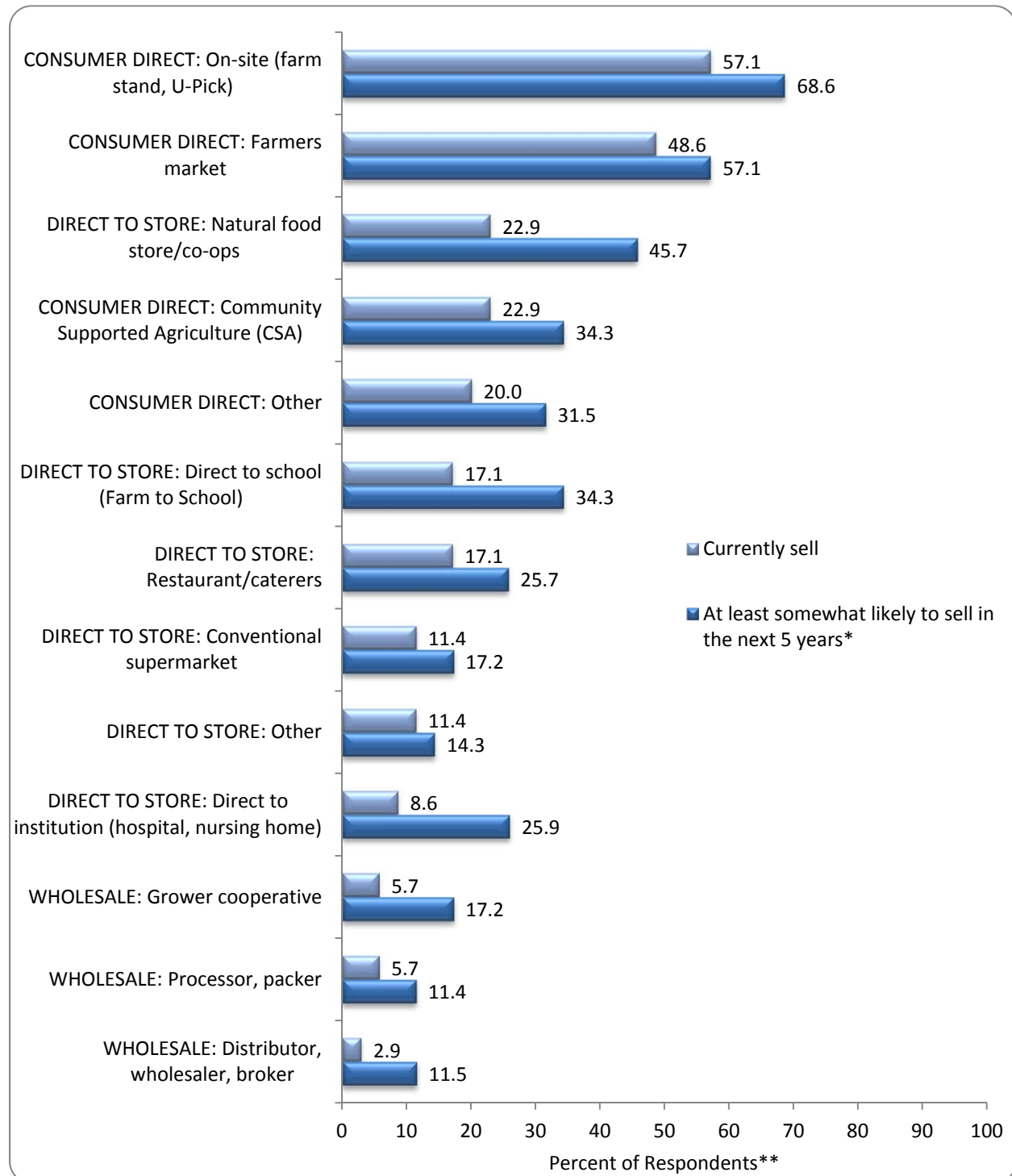
Direct to Store

- One-third of respondents indicated they are at least somewhat likely to sell to **direct to school (Farm to School) venues** in the future (34.3 percent). On average, the likelihood of selling using this venue in the future is 1.94 (currently sell mean= 4.67, do not currently sell= 1.43).
- Currently, nearly 1 in 10 respondents sells **directly to institutions (hospital, nursing home)** (8.6 percent). This proportion could grow to one-fourth of respondents, as 25.9 percent of respondents indicated some likelihood of selling through this venue in the next five years.

Wholesale

- **Grower cooperatives** could see an increase of 11 percentage points in producers selling through the venue over the next five years; currently, 5.7 percent of respondents sell through grower cooperatives and 17.2 percent indicated some likelihood of selling through this venue in the future.
- At least 1 in 10 respondents indicated some likelihood of selling through **processor/packer venues** and **distributors, wholesaler, or broker venues** in the future (11.4 percent and 11.5 percent, respectively).

Figure 8. Venues to which respondents currently sell their products and are at least somewhat likely to sell in the next five years

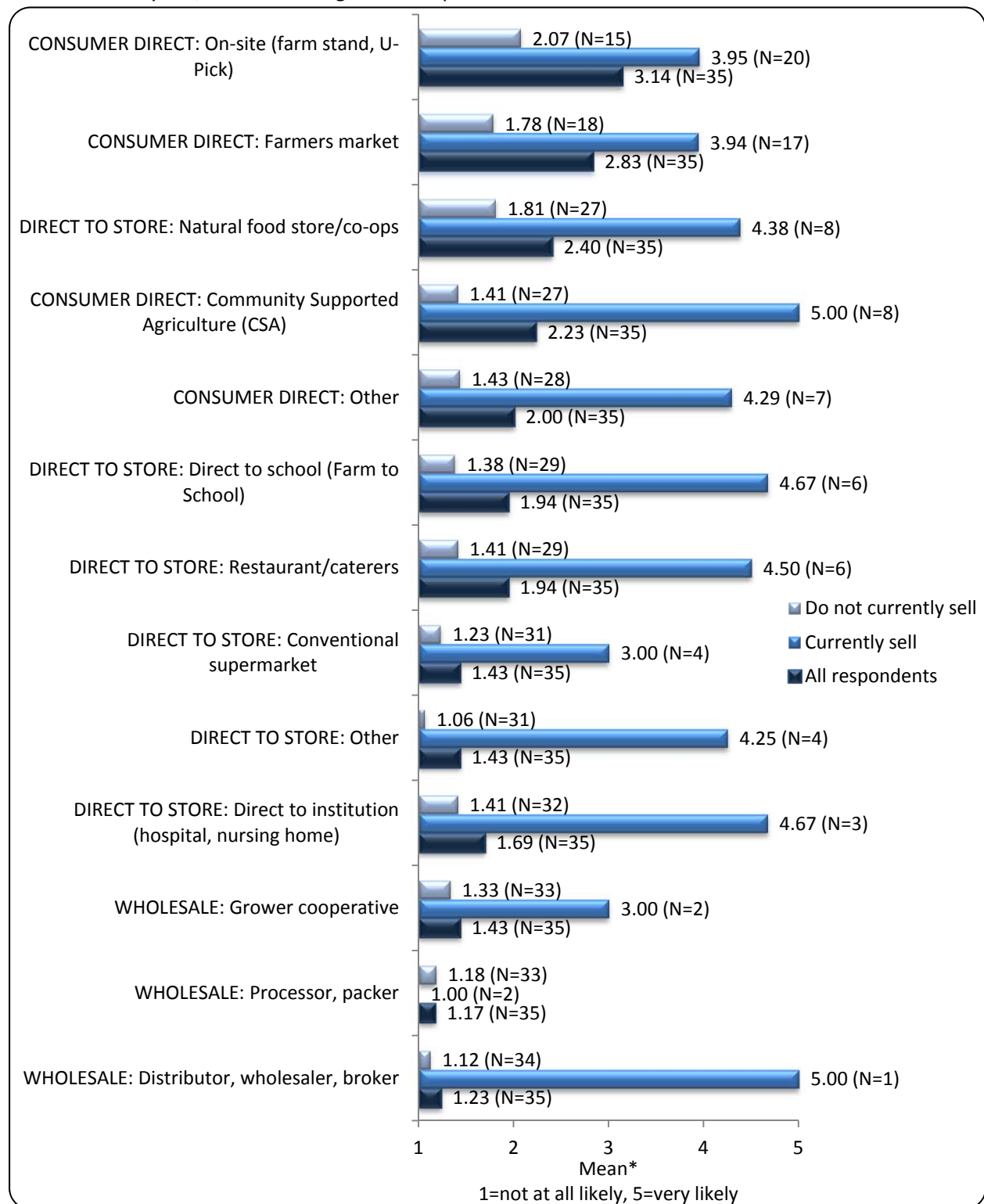


N=35

*See Appendix Table 8 for a detailed note.

**Percentages do not total 100.0 due to multiple responses.

Figure 9. Likelihood of selling to venues within the next five years by those who currently sell, those who do not currently sell, and the average of all respondents

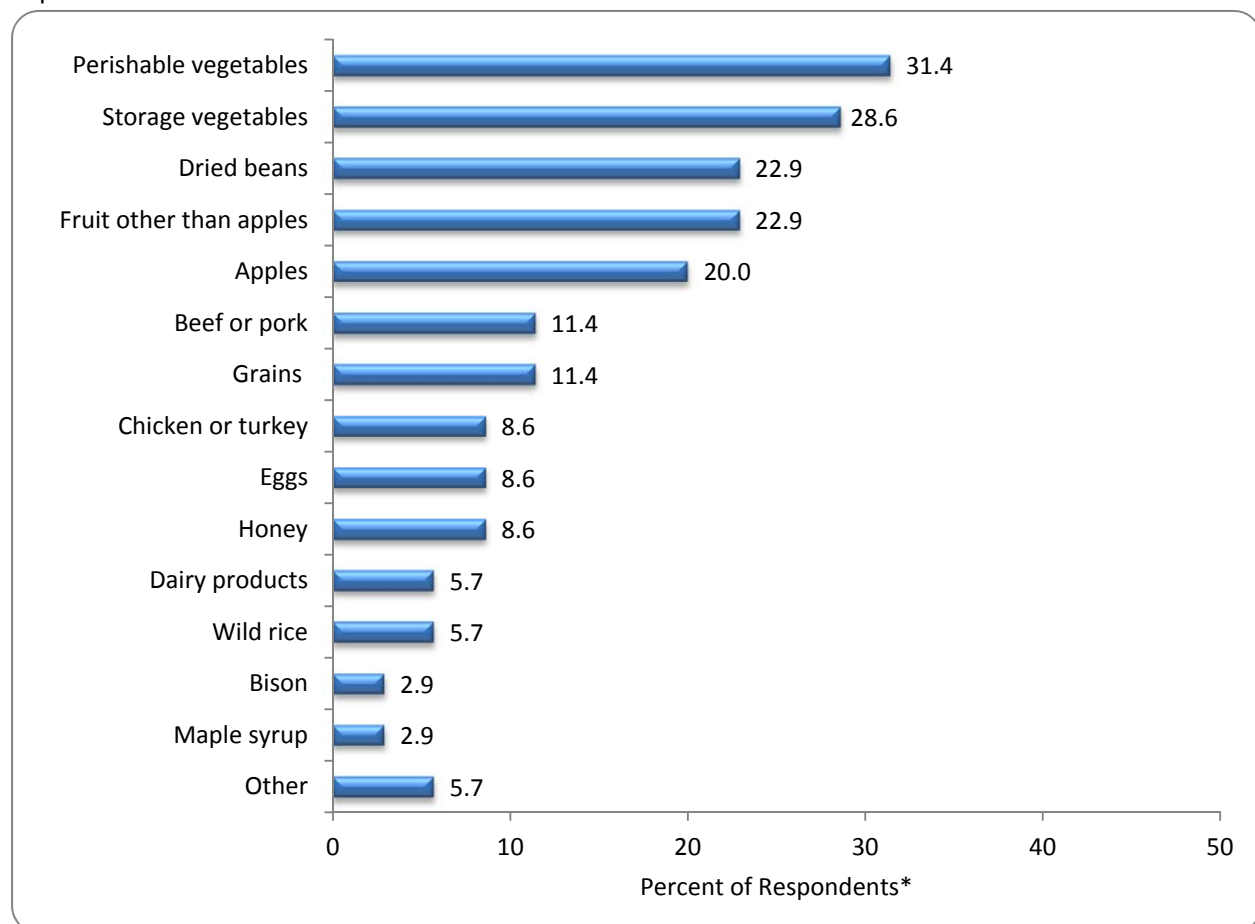


*See Appendix Table 9 for detailed note.

Respondents were asked to indicate their interest in growing and selling products in the future directly to a school or institution if schools/institutions expressed interest (*Figure 10, Appendix Table 11*).

- Nearly one-third of respondents said they are interested in growing and selling perishable vegetables (31.4 percent); more than one-fourth of respondents are interested in growing and selling storage vegetables (28.6 percent).
- Approximately one-fifth of respondents are interested in growing and selling dried beans (22.9 percent), fruit other than apples (22.9 percent), and apples (20.0 percent).
- Respondents were least likely to indicate an interest in producing dairy products (5.7 percent), wild rice (5.7 percent), bison (2.9 percent), and maple syrup (2.9 percent).
- Other products that interest respondents but are not listed below include goats for dairy products, hay, herbs, and native grapes.

Figure 10. Products respondents are interested in growing and selling in the future if schools/institutions express interest



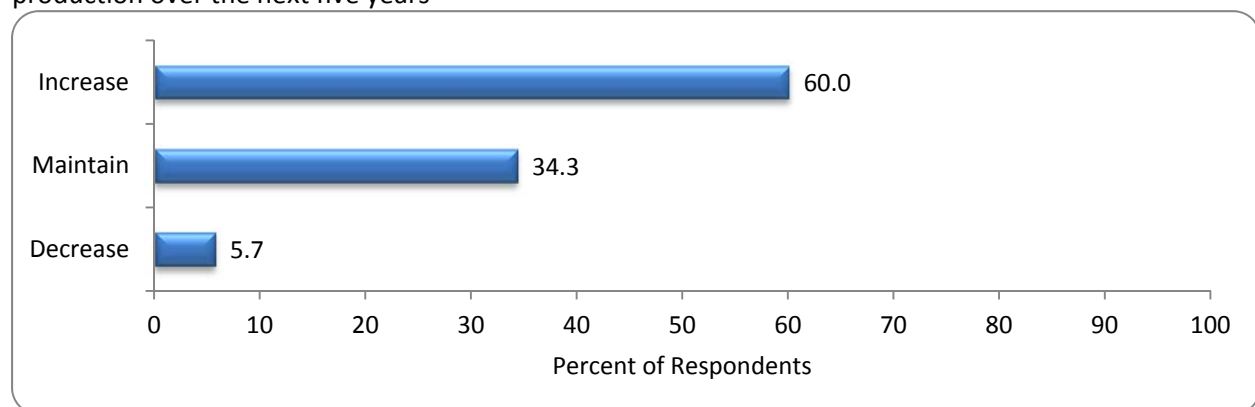
N=35

*Percentages do not total 100.0 due to multiple responses.

Respondents were asked to indicate whether they would like to maintain, increase, or decrease their overall farm production over the next five years (*Figure 11, Appendix Table 12*).

- Three-fifths of respondents would like to increase farm production over the next five years (60.0 percent). When asked to explain how much they would like to increase their farm production, responses included: double, a steady increase, and reevaluating every year to meet the needs of customers.
- One-third of respondents indicated they would like to maintain their production over the next five years (34.3 percent).
- A small proportion would like to decrease their production over the next five years (5.7 percent). When asked to explain by how much they would like to decrease their farm production, responses included: quitting and dependent upon our health.

Figure 11. Whether respondents would like to maintain, increase, or decrease their overall farm production over the next five years

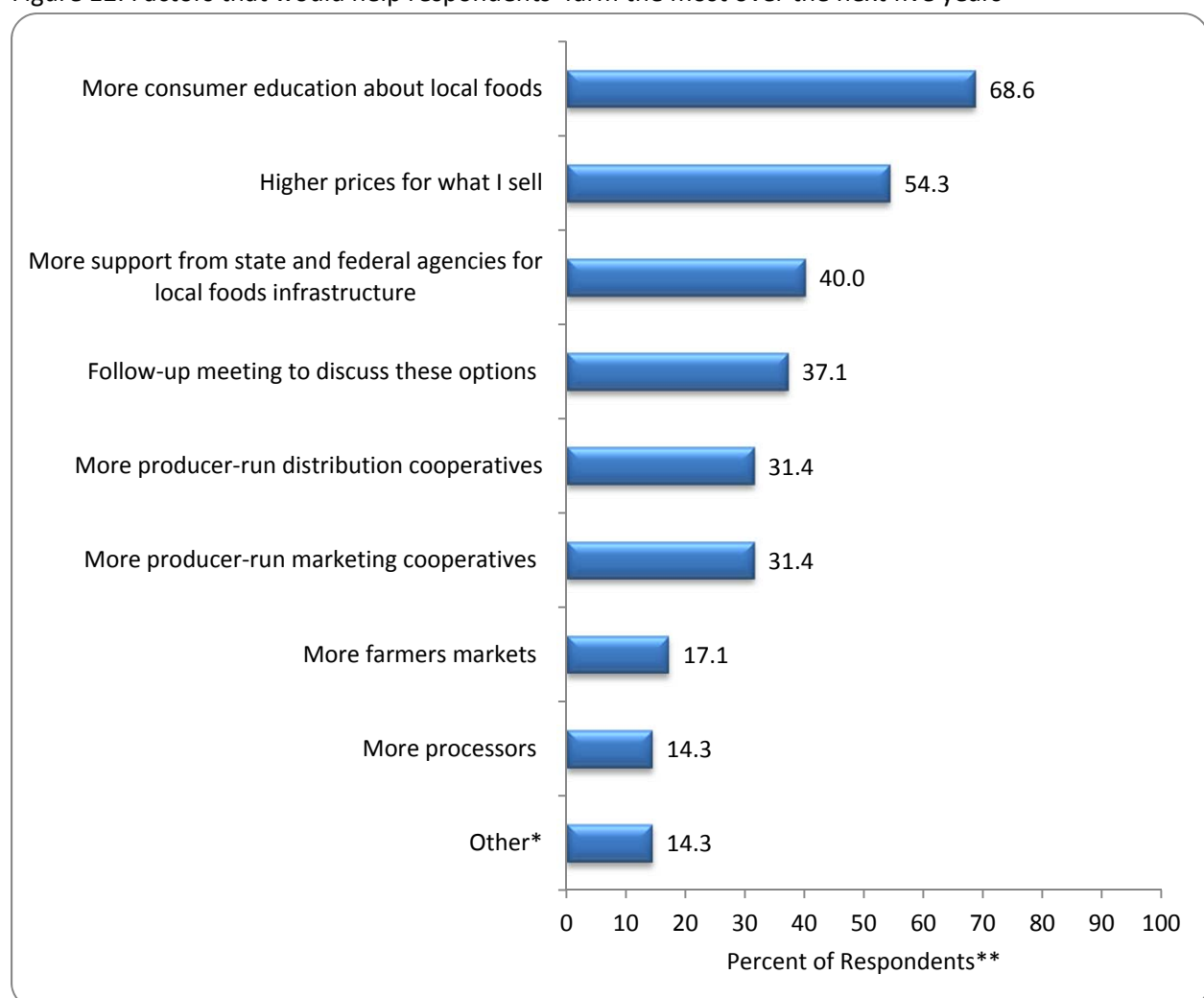


N=35

Respondents were asked to indicate what factors would help their farm the most over the next five years (*Figure 12, Appendix Table 13*).

- Approximately two-thirds of respondents indicated more consumer education about local foods would help their farm the most over the next five years (68.6 percent) and half of respondents indicated higher prices for what they sell would help (54.3 percent).
- About two-fifths of respondents would like more support from state and federal agencies for local foods infrastructure and follow-up meetings to discuss these options (40.0 percent and 37.1 percent, respectively).
- Nearly one-third of respondents said that more producer-run marketing cooperatives and more producer-run distribution cooperatives would help their farm (31.4 percent, each).

Figure 12. Factors that would help respondents' farm the most over the next five years



N=35

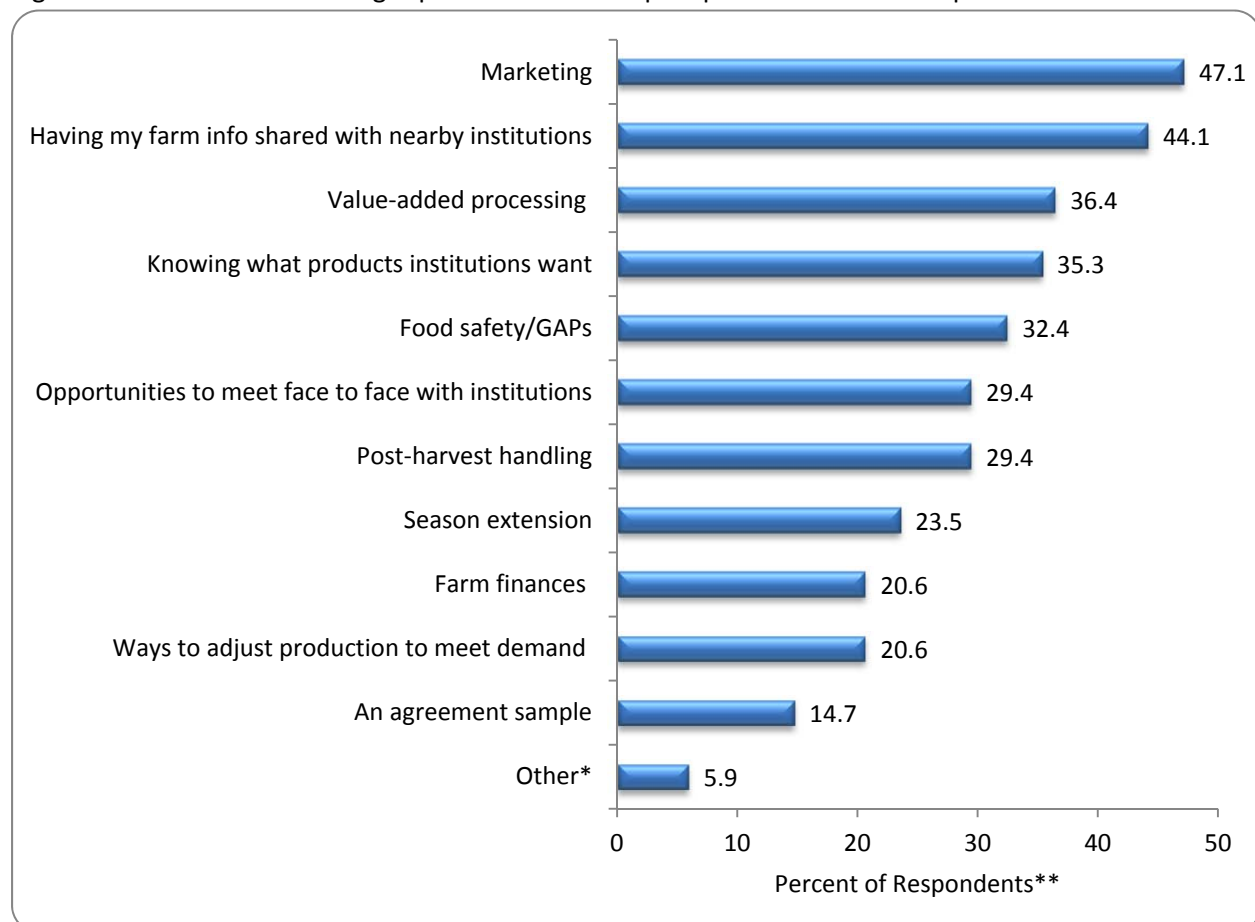
*See Appendix Table 13 for complete list of "other" responses.

**Percentages do not total 100.0 due to multiple responses.

Respondents were asked to indicate which education or training opportunities would help their operation (Figure 13, Appendix Table 14).

- Nearly half of respondents said that education or training opportunities regarding marketing and having their farm information shared with nearby institutions would help their operation (47.1 percent and 44.1 percent, respectively).
- Approximately one-third of respondents indicated that education and training involving value-added processing (36.4 percent), knowing what products institutions want (35.3 percent), and food safety/GAPs (Good Agricultural Practices) (32.4 percent) would help their operation.
- Approximately one-fourth of respondents would like the opportunity to meet with institutions (29.4 percent), education or training regarding post-harvest handling (29.4 percent), and season extension (23.5 percent).
- One-fifth of respondents would like more education regarding farm finances (20.6 percent) and ways to adjust production to meet demand (20.6 percent).

Figure 13. Education or training topics that would help respondents and their operation



N=35

*See Appendix Table 14 for complete list of "other" responses.

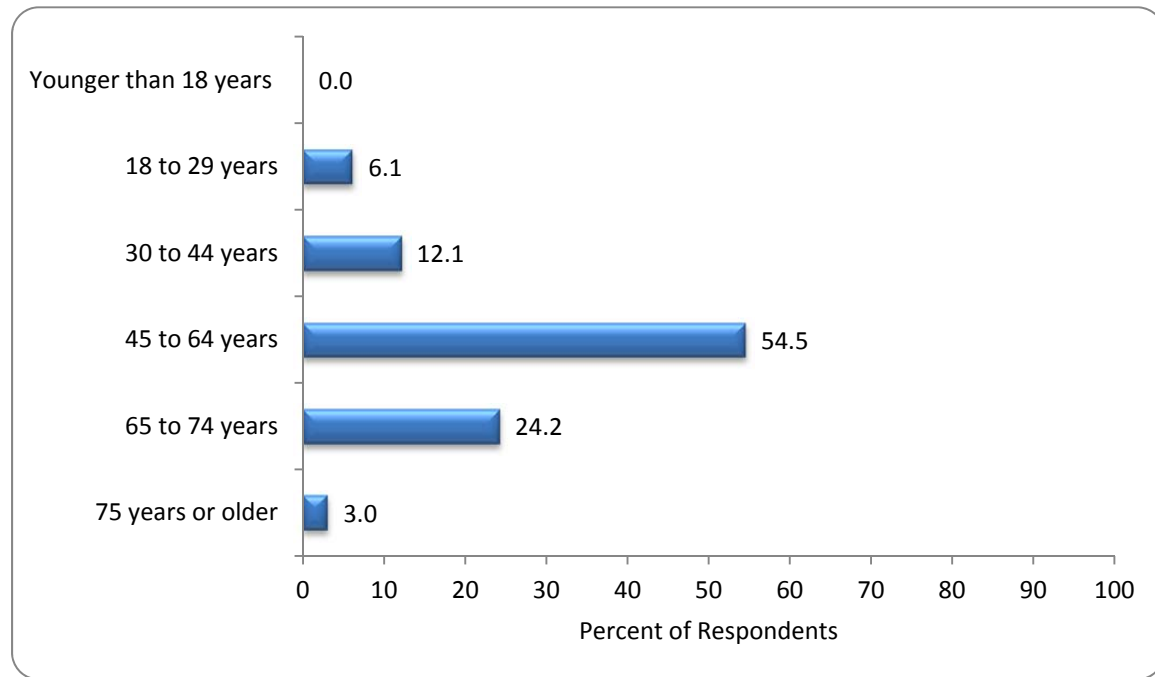
**Percentages do not total 100.0 due to multiple responses.

Personal Characteristics

Respondents were asked to indicate their age (*Figure 14, Appendix Table 15*).

- The majority of respondents are 45 years of age or older (81.7 percent).
- One-fourth of respondents are 65 years of age or older (27.2 percent).

Figure 14. Respondents' Age

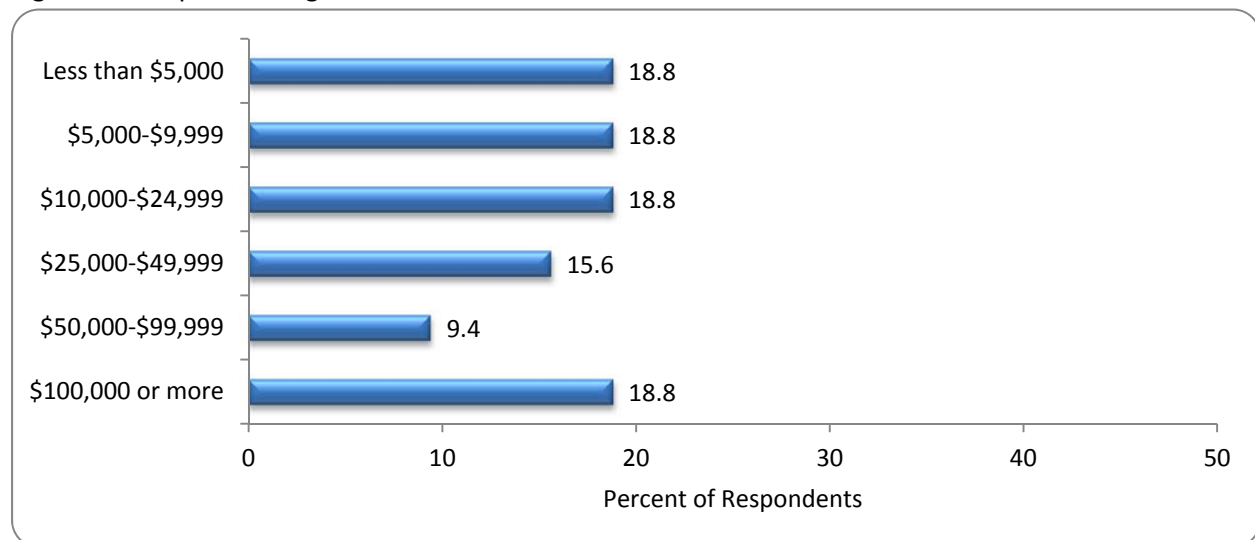


N=33

Respondents were asked to indicate their total gross farm sales for 2012 (*Figure 15, Appendix Table 16*).

- Nearly three-fourths of respondents said their total gross farm sales for 2012 were less than \$50,000 (72.0 percent); 18.8 percent of respondents indicated their total gross farm sales were \$100,000 or more.

Figure 15. Respondents' gross farm sales in 2012

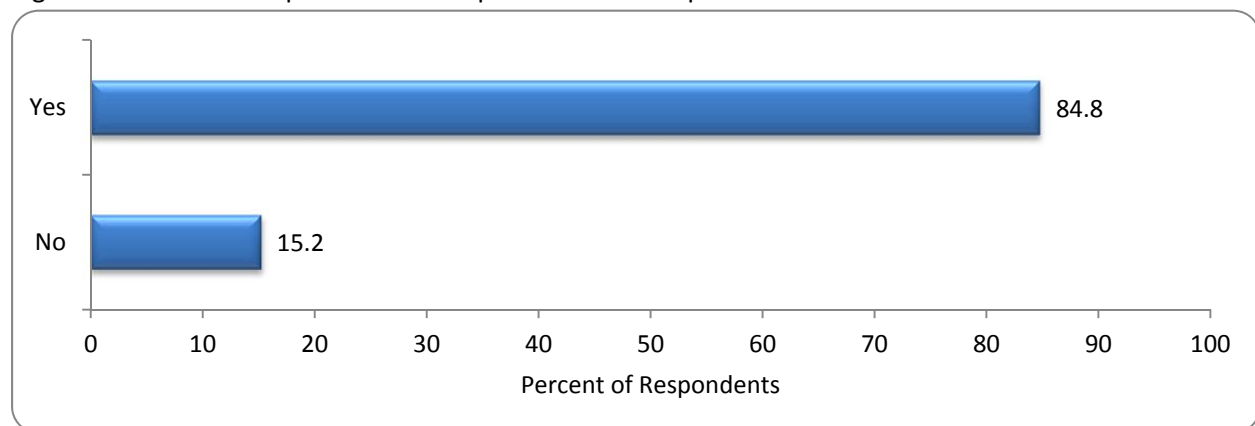


N=32

Respondents were asked to indicate whether they had a positive net farm profit in 2012 (*Figure 16, Appendix Table 17*).

- The majority of respondents indicated that their farm had a positive net profit in 2012 (84.8 percent).

Figure 16. Whether respondents had a positive net farm profit in 2012

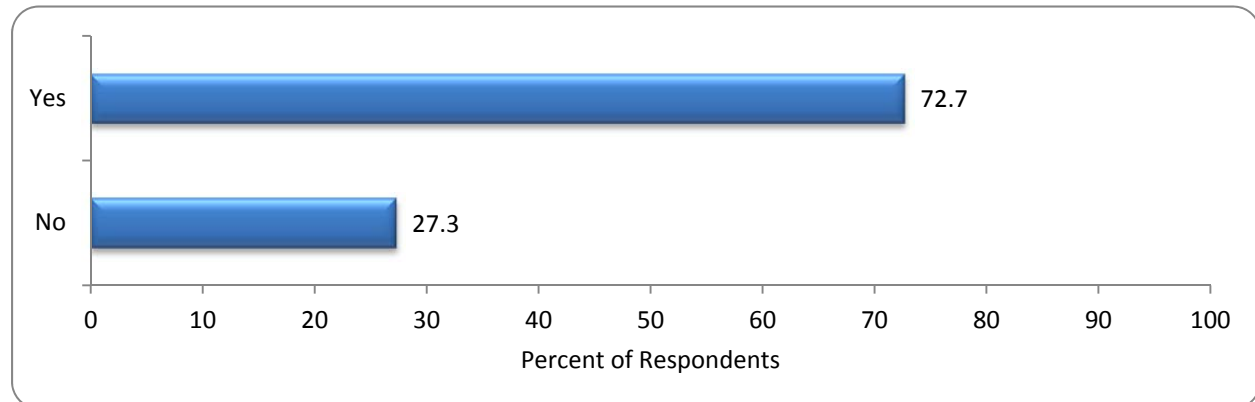


N=33

Respondents were asked to indicate whether any adults in their household earn off-farm income (*Figure 17, Appendix Table 18*).

- Nearly three-fourths of respondents indicated off-farm income was earned by an adult in their household in 2012 (72.7 percent).

Figure 17. Whether any adult in the household earned off-farm income in 2012



N=33

For additional comments regarding respondents' experiences with marketing and distributing foods in the region, see Appendix Table 19.

APPENDICES

Appendix Table 1. Acreage (owned, leased, or used free of charge) farmed in 2012

Number of acres	Percent of Respondents (N=31)
Less than 1 acre	6.5
1 to 25 acres	61.3
26 to 50 acres	3.2
51 to 100 acres	3.2
More than 100 acres	25.8
Total	100.0

Appendix Table 2. Types of products currently produced and sold by area growers

Products	Percent of Respondents* (N=35)
Perishable vegetables	74.3
Storage vegetables	62.9
Fruit other than apples	40.0
Apples	25.7
Chicken or turkey	17.1
Honey	14.3
Beef or pork	8.6
Eggs	8.6
Grains	8.6
Dairy products	2.9
Dried beans	2.9
Maple syrup	2.9
Bison	0.0
Wild rice	0.0
Other	8.6

*Percentages do not total 100.0 due to multiple responses.

Appendix Table 3. Months in which products are sold

Months	Percent of Respondents* (N=35)
January	22.9
February	20.0
March	20.0
April	22.9
May	48.6
June	88.6
July	91.4
August	97.1
September	97.1
October	91.4
November	45.7
December	37.1

*Percentages do not total 100.0 due to multiple responses.

Appendix Table 4. Types of technologies used in farm operation

Technologies	Percent of Respondents* (N=35)
Mechanical cultivation	51.4
Website	51.4
High tunnel	37.1
Walk-in cooler	34.3
Greenhouse	31.4
Dedicated delivery vehicle	14.3
On-farm freezer	14.3
Low tunnel	11.4
Other	17.1

*Percentages do not total 100.0 due to multiple responses.

Appendix Table 5. Importance of various factors to growing and selling products

Factors	Mean	Percent of Respondents					Total
		Level of importance (1=not at all important, 5=very important)					
		1	2	3	4	5	
Reliable customers (N=35)	4.29	2.9	2.9	8.6	34.3	51.4	100.1
Increasing access to healthy, locally grown food (N=35)	4.26	5.7	2.9	8.6	25.7	57.1	100.0
The ability to raise the products of my choosing (N=34)	4.15	5.9	5.9	8.8	26.5	52.9	100.0
Building relationships within the community (N=35)	4.09	5.7	5.7	11.4	28.6	48.6	100.0
Educating customers/students about the food system and where their food comes from (N=35)	4.03	0.0	8.6	20.0	31.4	40.0	100.0
Reducing my farm’s ecological footprint by selling to buyers close by (N=33)	3.97	3.0	9.1	18.2	27.3	42.4	100.0
The ability to produce at the level of my choosing (N=35)	3.97	8.6	5.7	17.1	17.1	51.4	99.9
Fair, steady prices (N=33)	3.85	9.1	9.1	9.1	33.3	39.4	100.0
Low production costs (N=33)	3.36	9.1	12.1	36.4	18.2	24.2	100.0
Diversifying my market (N=32)	3.34	9.4	18.8	25.0	21.9	25.0	100.1
Low marketing costs (N=33)	3.15	18.2	9.1	36.4	12.1	24.2	100.0
New revenue for my farm (N=33)	2.91	30.3	12.1	18.2	15.2	24.2	100.0
Large volume orders (N=35)	2.51	31.4	17.1	31.4	8.6	11.4	99.9
A market for surplus product (N=32)	2.44	34.4	18.8	25.0	12.5	9.4	100.1
A market for seconds (N=32)	2.41	40.6	15.6	18.8	12.5	12.5	100.0
It is the only option I have to sell (N=31)	2.06	45.2	22.6	16.1	12.9	3.2	100.0
Other* (N=3)	3.67	33.3	0.0	0.0	0.0	66.7	100.0

* "Other" responses include being able to make a living, enjoyment, and no response.

Appendix Table 6. Level of difficulty various issues present to farming operation

Issue	Mean	Percent of Respondents					Total
		Level of difficulty (1=not at all difficult, 5=very difficult)					
		1	2	3	4	5	
Production challenges (N=34)	3.32	20.6	5.9	11.8	44.1	17.6	100.0
Fuel costs (N=35)	3.09	17.1	17.1	31.4	8.6	25.7	99.9
Finding customers (N=34)	2.79	23.5	17.6	23.5	26.5	8.8	99.9
Marketing (N=33)	2.76	27.3	6.1	36.4	24.2	6.1	100.1
Labor costs (N=34)	2.56	41.2	8.8	17.6	17.6	14.7	99.9
Food safety laws and regulations (N=34)	2.38	38.2	14.7	29.4	5.9	11.8	100.0
Lack of distribution networks (N=29)	2.24	44.8	20.7	13.8	6.9	13.8	100.0
Lack of processors (N=28)	2.21	42.9	21.4	14.3	14.3	7.1	100.0
Liability/insurance costs (N=33)	2.18	42.4	18.2	21.2	15.2	3.0	100.0
Long travel distances to sell product (N=31)	2.03	45.2	19.4	25.8	6.5	3.2	100.1
Meeting buyers' specifications (N=32)	1.78	46.9	28.1	25.0	0.0	0.0	100.0

Appendix Table 7. Venues to which respondents currently sell their products and are at least somewhat likely to sell in the next five years

Venues	Percent of Respondents*	
	Currently sell (N=35)	Are at least somewhat likely to sell in the next five years** (N=35)
Consumer direct		
On-site (farm stand, U-pick)	57.1	68.6
Farmers market	48.6	57.1
Community Supported Agriculture (CSA)	22.9	34.3
Other	20.0	31.5
Direct to store		
Natural food store/co-ops	22.9	45.7
Direct to school (Farm to School)	17.1	34.3
Restaurant/caterers	17.1	25.7
Conventional supermarket	11.4	17.2
Direct to institution (hospital, nursing home)	8.6	25.9
Other	11.4	14.3
Wholesale		
Grower cooperative	5.7	17.2
Processor, packer	5.7	11.4
Distributor, wholesaler, broker	2.9	11.5

*Percentages do not total 100.0 due to multiple responses.

**Respondents were asked to rate the likelihood of selling or continuing to sell through venues over the next five years, with 1 being not at all likely and 5 being very likely. Those who rated their likelihood 2 and above were considered "at least somewhat likely to sell."

Appendix Table 8. Of all respondents, the likelihood they will sell their products or continue to sell to venues in the next five years

Venues	Mean	Percent of Respondents					Total
		Level of likelihood (1=not at all likely, 5=very likely)					
		1	2	3	4	5	
Consumer direct							
Farmers market	2.83	42.9	0.0	17.1	11.4	28.6	100.0
On-site (farm, U-Pick)	3.14	31.4	2.9	20.0	11.4	34.3	100.0
Community Supported Agriculture (CSA)	2.23	65.7	2.9	0.0	5.7	25.7	100.0
Other consumer direct	2.00	68.6	5.7	2.9	2.9	20.0	100.0
Direct to store							
Natural food store/co-ops	2.40	54.3	2.9	20.0	5.7	17.1	100.0
Direct to school (Farm to School)	1.94	65.7	5.7	8.6	8.6	11.4	100.0
Restaurant/caterers	1.94	74.3	0.0	5.7	8.6	11.4	100.0
Direct to institution (hospital, nursing home)	1.69	74.3	2.9	8.6	8.6	5.7	100.0
Conventional supermarket	1.43	82.9	0.0	5.7	2.9	8.6	100.0
Other direct to store	1.43	85.7	0.0	5.7	2.9	5.7	100.0
Wholesale							
Grower cooperative	1.43	82.9	0.0	11.4	2.9	2.9	100.0
Processor, packer	1.17	88.6	5.7	5.7	0.0	0.0	100.0
Distributor, wholesaler, broker	1.23	88.6	5.7	2.9	0.0	2.9	100.0

N=35

Note: Respondents who did not select an answer were coded as a 1 (not at all likely).

Appendix Table 9. Of respondents who currently sell their products to these venues, the likelihood they will continue to sell in the next five years

Venues	Mean	Percent of Respondents					Total
		Level of likelihood (1=not at all likely, 5=very likely)					
		1	2	3	4	5	
Consumer direct							
Farmers market (N=17)	3.94	11.8	0.0	23.5	11.8	52.9	100.0
On-site (farm, U-Pick) (N=11)	3.95	15.0	0.0	15.0	15.0	55.0	100.0
Community Supported Agriculture (CSA) (N=8)	5.00	0.0	0.0	0.0	0.0	100.0	100.0
Other consumer direct (N=7)	4.29	14.3	0.0	0.0	14.3	71.4	100.0
Direct to store							
Natural food store/co-ops (N=8)	4.38	12.5	0.0	25.0	12.5	50.0	100.0
Restaurant/caterers (N=6)	4.50	16.7	0.0	0.0	50.0	33.3	100.0
Direct to school (Farm to School) (N=6)	4.67	0.0	0.0	0.0	33.3	66.7	100.0
Direct to institution (hospital, nursing home) (N=3)	4.67	0.0	0.0	0.0	33.3	66.7	100.0
Conventional supermarket (N=4)	3.00	50.0	0.0	0.0	0.0	50.0	100.0
Other direct to store (N=4)	4.25	0.0	0.0	25.0	25.0	50.0	100.0
Wholesale							
Grower cooperative (N=2)	3.00	50.0	0.0	0.0	0.0	50.0	100.0
Processor, packer (N=2)	1.00	100.0	0.0	0.0	0.0	0.0	100.0
Distributor, wholesaler, broker (N=1)	5.00	0.0	0.0	0.0	0.0	100.0	100.0

Note: Respondents who did not select an answer were coded as a 1 (not at all likely).

Appendix Table 10. Of respondents who do not currently sell their products to these venues, the likelihood they will begin to sell in the next five years

Venues	Mean	Percent of Respondents					Total
		Level of likelihood (1=not at all likely, 5=very likely)					
		1	2	3	4	5	
Consumer direct							
Farmers market (N=18)	1.78	72.2	0.0	11.1	11.1	5.6	100.0
On-site (farm, U-Pick) (N=15)	2.07	53.3	6.7	26.7	6.7	6.7	100.1
Community Supported Agriculture (CSA) (N=27)	1.41	85.2	3.7	0.0	7.4	3.7	100.0
Other consumer direct (N=28)	1.43	82.1	7.1	3.6	0.0	7.1	99.9
Direct to store							
Natural food store/co-ops (N=27)	1.81	66.7	3.7	18.5	3.7	7.4	100.0
Restaurant/caterers (N=29)	1.41	86.2	0.0	6.9	0.0	6.9	100.0
Direct to school (Farm to School) (N=29)	1.38	79.3	6.9	10.3	3.4	0.0	100.0
Direct to institution (hospital, nursing home) (N=32)	1.41	81.2	3.1	9.4	6.2	0.0	100.0
Conventional supermarket (N=31)	1.23	87.1	0.0	6.5	3.2	3.2	100.0
Other direct to store (N=31)	1.06	96.8	0.0	3.2	0.0	0.0	100.0
Wholesale							
Grower cooperative (N=33)	1.33	84.8	0.0	12.1	3.0	0.0	100.0
Processor, packer (N=33)	1.18	87.9	6.1	6.1	0.0	0.0	100.0
Distributor, wholesaler, broker (N=34)	1.12	91.2	5.9	2.9	0.0	0.0	100.0

Note: Respondents who did not select an answer were coded as a 1 (not at all likely).

Appendix Table 11. Products respondents are interested in growing and selling in the future if schools/institutions express interest

Products	Percent of Respondents* (N=35)
Perishable vegetables	31.4
Storage vegetables	28.6
Dried beans	22.9
Fruit other than apples	22.9
Apples	20.0
Beef or pork	11.4
Grains	11.4
Chicken or turkey	8.6
Eggs	8.6
Honey	8.6
Dairy products	5.7
Wild rice	5.7
Bison	2.9
Maple syrup	2.9
Other	5.7

*Percentages do not total 100.0 due to multiple responses.

Appendix Table 12. Whether respondents would like to maintain, increase, or decrease their overall farm production over the next five years

Level of production	Percent of Respondents (N=35)
Increase	60.0
Maintain	34.3
Decrease	5.7

Appendix Table 13. Factors that would help respondents' farm the most over the next five years

Factors	Percent of Respondents* (N=35)
More consumer education about local foods	68.6
Higher prices for what I sell	54.3
More support from state and federal agencies for local foods infrastructure	40.0
Follow up meeting to discuss these options	37.1
More producer-run distribution cooperatives	31.4
More producer-run marketing cooperatives	31.4
More farmers markets	17.1
More processors	14.3
Other:	14.3
<i>Better growing conditions</i>	
<i>Biodynamics education</i>	
<i>Decrease in transportation costs</i>	
<i>Health insurance rewards for consumers eating healthy/being a part of a CSA</i>	
<i>Reduced regulation</i>	
<i>Time and money for enterprise and labor</i>	

*Percentages do not total 100.0 due to multiple responses.

Appendix Table 14. Education or training topics that would help respondents and their operation

Education or training topics	Percent of Respondents* (N=35)
Marketing	47.1
Having my farm info shared with nearby institutions	44.1
Value-added processing	36.4
Knowing what products institutions want	35.3
Food safety/GAPs	32.4
Opportunities to meet face to face with institutions	29.4
Post-harvest handling	29.4
Season extension	23.5
Farm finances	20.6
Ways to adjust production to meet demand	20.6
An agreement sample	14.7
Other:	5.9
<i>Continuing education</i>	
<i>Maintaining stewardship of the land</i>	
<i>Soil testing information</i>	

*Percentages do not total 100.0 due to multiple responses.

Appendix Table 15. Respondents' Age

Age categories	Percent of Respondents (N=33)
Younger than 18 years	0.0
18 to 29 years	6.1
30 to 44 years	12.1
45 to 64 years	54.5
65 to 74 years	24.2
75 years or older	3.0
Total	99.9

Appendix Table 16. Respondents' gross farm sales in 2012

Gross farm sales in 2012	Percent of Respondents (N=32)
Less than \$5,000	18.8
\$5,000-\$9,999	18.8
\$10,000-\$24,999	18.8
\$25,000-\$49,999	15.6
\$50,000-\$99,999	9.4
\$100,000 or more	18.8
Total	100.2

Appendix Table 17. Whether respondents had a positive net farm profit in 2012

Positive net farm profit in 2012	Percent of respondents (N=33)
Yes	84.8
No	15.2
Total	100.0

Appendix Table 18. Whether any adult in the household earned off-farm income in 2012

Earned off-farm income in 2012	Percent of respondents (N=33)
Yes	72.7
No	27.3
Total	100.0

Appendix Table 19. Additional comments regarding respondents' experiences with marketing and distributing foods in the region

Comments
A general guide for pricing would be beneficial
CSAs have been quite beneficial in distributing produce
High costs for processing (wools, meats, etc.)
Consumer education is needed
Farming is rewarding, especially when working with great buyers
Producers often do not have the time or energy to attend numerous meetings or participate in all organizations
No plans for increasing operation due to age and/or ability

NDSU NORTH DAKOTA STATE UNIVERSITY

Center for Social Research
NDSU Dept. 8000, PO BOX 6050

T: 701-231-1058
F: 701-231-9730

January 21, 2012

Dear Grower/Producer:

You are invited to participate in a research study. The purpose of this study is to learn about the issues that local growers and food producers face when distributing and marketing their products in the region. We would also like to learn whether you would be interested in accessing new markets.

The study is sponsored by the University of Minnesota Extension and PartnerShip 4 Health, a component of the Statewide Health Improvement Program (SHIP). SHIP is an integral part of Minnesota's nation-leading 2008 health reform law. SHIP also strives to help Minnesotans lead longer, healthier lives.

The Center for Social Research at North Dakota State University (NDSU) in partnership with University of Minnesota Extension is conducting the study. Your household was selected from a list of area growers and food producers in the Becker, Clay, Otter Tail, and Wilkin county area in Minnesota and Cass County, North Dakota. A survey is included in this packet. The survey is voluntary and you can leave blank any question you don't want to answer. All responses are anonymous and will be reported in aggregate form. Data collected will be securely stored. Please take a few minutes to complete this important survey. For your convenience, we have enclosed a postage-paid return envelope.

If you have any questions about this survey, contact Ryan Pesch, Extension Educator at pesch@umn.edu or 218-236-2270. If you have questions about your rights as a human research participant or to report a problem, contact NDSU's Human Research Protection Program at 701-231-8908.

Thank you for your participation.

Sincerely,



Gina Nolte
Director of Health Promotion
Clay County Public Health
715 11th Street North, Suite 303
Moorhead, MN 56560
www.partnerSHIP4Health.org



Ryan Pesch
Extension Educator
University of Minnesota, Extension
715 11th St N Ste 107C,
Moorhead, Minnesota



UNIVERSITY OF MINNESOTA | EXTENSION

GROWER/PRODUCER SURVEY

PRODUCTION AND DISTRIBUTION

Q1. How many acres (all land owned, leased, or used free of charge) did you farm in 2012? _____

Q2. What proportion of your **total sales** is each of the following products?

Product	% of total sales
Fruits	
Vegetables	
Meats	
Dairy	
Eggs	
Specialty products (i.e., honey, maple syrup)	
Other (specify)	
Total	100%

Q3. In the following list of products, please tell us a) which ones you currently grow and sell, and b) whether you would be interested in growing and selling if schools/institutions express interest.

Product	Currently grow and sell	Interested in growing and selling
Perishable vegetables	<input type="checkbox"/>	<input type="checkbox"/>
Storage vegetables	<input type="checkbox"/>	<input type="checkbox"/>
Fruit other than apples	<input type="checkbox"/>	<input type="checkbox"/>
Apples	<input type="checkbox"/>	<input type="checkbox"/>
Chicken or turkey	<input type="checkbox"/>	<input type="checkbox"/>
Eggs	<input type="checkbox"/>	<input type="checkbox"/>
Beef or pork	<input type="checkbox"/>	<input type="checkbox"/>
Honey	<input type="checkbox"/>	<input type="checkbox"/>
Grains	<input type="checkbox"/>	<input type="checkbox"/>
Dried beans	<input type="checkbox"/>	<input type="checkbox"/>
Maple syrup	<input type="checkbox"/>	<input type="checkbox"/>
Dairy products	<input type="checkbox"/>	<input type="checkbox"/>
Wild rice	<input type="checkbox"/>	<input type="checkbox"/>
Bison	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify)_____	<input type="checkbox"/>	<input type="checkbox"/>

Q4. In which of the following months of the year do you sell the products you raise? *(Check all that apply)*

- | | | | |
|-----------------------------------|--------------------------------|------------------------------------|-----------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> April | <input type="checkbox"/> July | <input type="checkbox"/> October |
| <input type="checkbox"/> February | <input type="checkbox"/> May | <input type="checkbox"/> August | <input type="checkbox"/> November |
| <input type="checkbox"/> March | <input type="checkbox"/> June | <input type="checkbox"/> September | <input type="checkbox"/> December |

Q5. Which of the following technologies do you employ on your operation? *(Check all that apply)*

- | | |
|---|---|
| <input type="checkbox"/> High tunnel | <input type="checkbox"/> On-farm freezer |
| <input type="checkbox"/> Greenhouse | <input type="checkbox"/> Dedicated delivery vehicle |
| <input type="checkbox"/> Low tunnel | <input type="checkbox"/> Website |
| <input type="checkbox"/> Mechanical cultivation | <input type="checkbox"/> Other (specify)_____ |
| <input type="checkbox"/> Walk-in cooler | |

Q6. For each of the following venues, please tell us: a) of the products you currently sell, what is the percentage of total sales for each venue and b) over the next 5 years, what is the likelihood that you will sell or continue to sell through these venues (using a 1 to 5 scale, with 1 “being not at all likely” and 5 being “very likely”)?

Venues	a) % of total sales <u>CURRENTLY</u>	b) <u>OVER THE NEXT 5 YEARS</u> 1=Not at all likely; 5=very likely
<i>CONSUMER DIRECT</i>		
Farmers Market	_____	1----2----3----4----5
Community Supported Agriculture (CSA)	_____	1----2----3----4----5
On-site (farm stand, U-Pick)	_____	1----2----3----4----5
Other Consumer direct (Specify) _____	_____	1----2----3----4----5
<i>DIRECT TO STORE</i>		
Natural food store/co-ops	_____	1----2----3----4----5
Conventional supermarket	_____	1----2----3----4----5
Restaurant/caterers	_____	1----2----3----4----5
Direct to institution (hospital, nursing home)	_____	1----2----3----4----5
Direct to School (Farm To School)	_____	1----2----3----4----5
Other direct to store (Specify) _____	_____	1----2----3----4----5
<i>WHOLESALE</i>		
Processor, packer	_____	1----2----3----4----5
Distributor, wholesaler, broker	_____	1----2----3----4----5
Grower cooperative	_____	1----2----3----4----5
Total	100%	

Q7. Please tell us the importance of each of the following items when deciding why you grow and sell the products you produce (using a 1 to 5 scale, with 1 being “not at all important” and 5 being “very important”).

Items	1=Not at all important; 5=very important
Fair, steady prices	1-----2-----3-----4-----5
The ability to produce at the level of my choosing	1-----2-----3-----4-----5
The ability to raise the products of my choosing	1-----2-----3-----4-----5
Low production costs	1-----2-----3-----4-----5
Low marketing costs	1-----2-----3-----4-----5
Building relationships within community	1-----2-----3-----4-----5
Reliable customers	1-----2-----3-----4-----5
Large volume orders	1-----2-----3-----4-----5
New revenue for my farm	1-----2-----3-----4-----5
Increasing access to healthy, locally grown food	1-----2-----3-----4-----5
Reducing my farm’s ecological footprint by selling to buyers close by	1-----2-----3-----4-----5
Educating customers/students about the food system and where their food comes from	1-----2-----3-----4-----5
A market for seconds	1-----2-----3-----4-----5
A market for surplus product	1-----2-----3-----4-----5
Diversifying my market	1-----2-----3-----4-----5
It is the only option I have to sell	1-----2-----3-----4-----5
Other (please specify) _____	1-----2-----3-----4-----5

Q8. During the 2012 growing season, how many MILES PER WEEK did you, family members, or employees drive in order to deliver products (including round trip mileage to drop off product and/or drive to farmers market)?

_____ miles per week

Q9. During the 2012 growing season, how many HOURS PER WEEK did you, family members, or employees spend on the following activities?

Hours per week

- a. On the phone related to selling what you produce _____
- b. On email related to selling what you produce _____
- c. Using social media (Facebook) related to selling what you produce _____
- d. Post-harvest handling such as boxing, washing, bunching _____
- e. Driving to deliver product or to reach farmers market _____
- f. Setting up/selling/breaking down at farmers market _____
- g. Website development and management _____
- h. Other major marketing/distributing activities (please specify) _____

Q10. How many hours per week on average do you spend marketing what you produce in the off season?

Q11. How difficult are each of the following issues for your farming operation (using a 1 to 5 scale, with 1 being “not at all difficult” and 5 being “very difficult”)?

Issues	1=Not at all difficult; 5=very difficult
Labor costs	1-----2-----3-----4-----5
Fuel costs	1-----2-----3-----4-----5
Lack of processors	1-----2-----3-----4-----5
Marketing	1-----2-----3-----4-----5
Lack of distribution networks	1-----2-----3-----4-----5
Long travel distances to sell product	1-----2-----3-----4-----5
Meeting buyers' specifications	1-----2-----3-----4-----5
Liability/insurance costs	1-----2-----3-----4-----5
Finding customers	1-----2-----3-----4-----5
Production challenges	1-----2-----3-----4-----5
Food safety laws and regulation	1-----2-----3-----4-----5
Other (please specify)_____	1-----2-----3-----4-----5

FUTURE PLAN

Q12. What is your level of interest in taking part in the following distribution or marketing initiatives if they were to become available in your area over the next 5 years (using a 1 to 5 scale, with 1 being “not at all interested and 5 being “very interested)?

Distribution/Marketing initiatives	1=Not at all interested; 5=very interested
Cooperative processing facility	1-----2-----3-----4-----5
Distribution network of growers	1-----2-----3-----4-----5
Online buying club	1-----2-----3-----4-----5
Marketing	1-----2-----3-----4-----5
Regional labeling campaign	1-----2-----3-----4-----5
Farmer-led marketing cooperative	1-----2-----3-----4-----5
Online marketing cooperative	1-----2-----3-----4-----5
Regional consumer education campaign	1-----2-----3-----4-----5
Follow up meeting to discuss these options	1-----2-----3-----4-----5

Q13. Over the next 5 years, would you like to maintain, increase, or decrease overall farm production?

- ☐ Decrease (*By how much?* _____)
- ☐ Maintain.
- ☐ Increase (*By how much?* _____)

Q14. In the next 5 years, which would help your farm the most? (*Check all that apply*)

- ☐ Higher prices for what I sell
- ☐ More producer-run marketing cooperatives
- ☐ More processors
- ☐ More consumer education about local foods
- ☐ More support from state and federal agencies for local foods infrastructure
- ☐ More producer-run distribution cooperatives
- ☐ More farmers markets
- ☐ Follow up meeting to discuss these options
- ☐ Other (please specify) _____

Q15. Which of the following education or training topics would help you and your operation? (*Check all that apply*)

- | | |
|---|---|
| <input type="checkbox"/> Food safety/ GAPs | <input type="checkbox"/> Farm Finances |
| <input type="checkbox"/> Value-added processing | <input type="checkbox"/> Opportunities to meet face to face with institutions |
| <input type="checkbox"/> Value-added processing | <input type="checkbox"/> An agreement sample |
| <input type="checkbox"/> Marketing | <input type="checkbox"/> Knowing what products institutions want |
| <input type="checkbox"/> Ways to adjust production to meet demand | <input type="checkbox"/> Having my farm info shared with nearby institutions |
| <input type="checkbox"/> Season extension | <input type="checkbox"/> Other (please specify) _____ |
| <input type="checkbox"/> Post-harvest handling | |

PERSONAL CHARACTERISTICS

Q16. What is your age? _____

Q17. In 2012 what were total your gross farm sales?

- | | |
|--|--|
| <input type="checkbox"/> Less than \$5,000 | <input type="checkbox"/> \$25,000-\$49,999 |
| <input type="checkbox"/> \$5,000-\$9,999 | <input type="checkbox"/> \$50,000-\$99,999 |
| <input type="checkbox"/> \$10,000-\$24,999 | <input type="checkbox"/> \$100,000 or more |

Q18. Did you have a positive net farm profit in 2012?

- ☐ Yes
- ☐ No

Q19. Did any adult in your household earn off-farm income?

- ☐ Yes
- ☐ No

Q20. Is there anything else you would like to share about your experiences with marketing and distributing foods in the region?

Thank you!