

July 31, 2006

# Continued Success Seven Years Into CISA's Campaign

## Opportunities to Further Increase Market Share

**To:** Mark Lattanzi, CISA  
**From:** Mike Bocian and Molly Murphy

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### Executive Summary

After seven years, CISA's Be a Local Hero, Buy Locally Grown campaign continues to enjoy success. In fact, there is clear evidence that the campaign's success has increased through a disciplined adherence to a consistent, compelling message.

Consumers are aware of CISA's buy local campaign and receptive to it. Beyond the attributes consumers inherently attribute to locally grown food, principally freshness, CISA has expanded consumers' views by communicating the benefit to the local economy of purchasing locally grown food.

At the same time, there is reason to believe that CISA can further expand the market share of locally produced products in the food buying market. A second message component, one focused on health, can supplement the core message of supporting the local economy to augment consumer awareness of the benefits of locally produced food.

The following are key findings from a survey of 417 primary food buyers conducted June 21-27, 2006. The survey is subject to a margin of error of  $\pm 4.4$  percentage points at the 95 percent confidence level.<sup>1</sup>

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<sup>1</sup> At times in this survey, we reference data collected previously by another survey research firm in 1999, 2000 and 2002. The results are not directly comparable because the regional definition has changed a few times over the years. However, the overlap is significant and we present trend data with the belief that while the sample definition was not exactly the same, it is close enough to make comparisons useful.

## Key Findings

- **CISA's buy local campaign enjoys incredibly strong penetration.** An exceptionally high 82 percent of consumers in Franklin and Hampshire counties recall seeing advertisements about buying locally produced food. The campaign's theme of supporting the local economy is crystal clear to consumers.
- **Reinforced messaging has produced a cumulative effect on recall of the campaign's slogan.** A stunning 44 percent of consumers recognize the campaign's slogan, Be a Local Hero, Buy Locally Grown, consistent with 2002 and an increase of 7 points since 2000 and 10 points since 1999.
- **Newspaper and in-store advertising continue to be the most important source of information.** Consumers not only rely most heavily on newspaper and in-store advertising for information about food, but they most recall these forms of advertising from CISA.
- **Bumper stickers have a surprisingly large reach as a vehicle for communicating CISA's campaign.** Remarkably, 78 percent of consumers recall seeing bumper stickers about buying locally produced food (when prompted), higher even than newspaper advertising or in-store advertising.
- **The campaign seems to be having a pronounced impact on consumer attitudes and behavior.** While this is not a randomized experiment, the circumstantial evidence suggests that the campaign is persuasive to consumers and influencing their food purchase decisions.
  - 99 percent of those who recall seeing or hearing ads buy locally grown foods compared to just 80 percent of those who have not seen ads
  - 70 percent of those who have seen ads buy locally grown foods every week compared to 30 percent of those who have not seen ads
  - 46 percent of those who purchase locally grown food every week find the ads very convincing compared to 31 percent of those who purchase locally grown foods less often
  - Those who have seen ads shop at farmers' markets 12 times a year on average, compared to 4 times a year for those who have not seen ads.
  - Those who have seen ads shop at roadside stands 16 times a year on average compared to 9 times a year for those who have not seen ads.
- **Consumers in Franklin County are most aware and receptive to the campaign.** Franklin County consumers are more likely than those in Hampshire County to recognize the sponsor of the advertisements, to report that the advertisements influence their behavior, and to shop at farmers' markets and roadside stands.

- **College educated and liberal consumers are most aware of campaign and most likely to buy locally grown food.** Throughout the data, there are clear differences based on educational attainment and political ideology. Those with a college education and those who consider themselves liberal are more likely than non-college consumers and conservatives to buy locally grown food and to recognize CISA's campaign.

## Strategic Recommendations

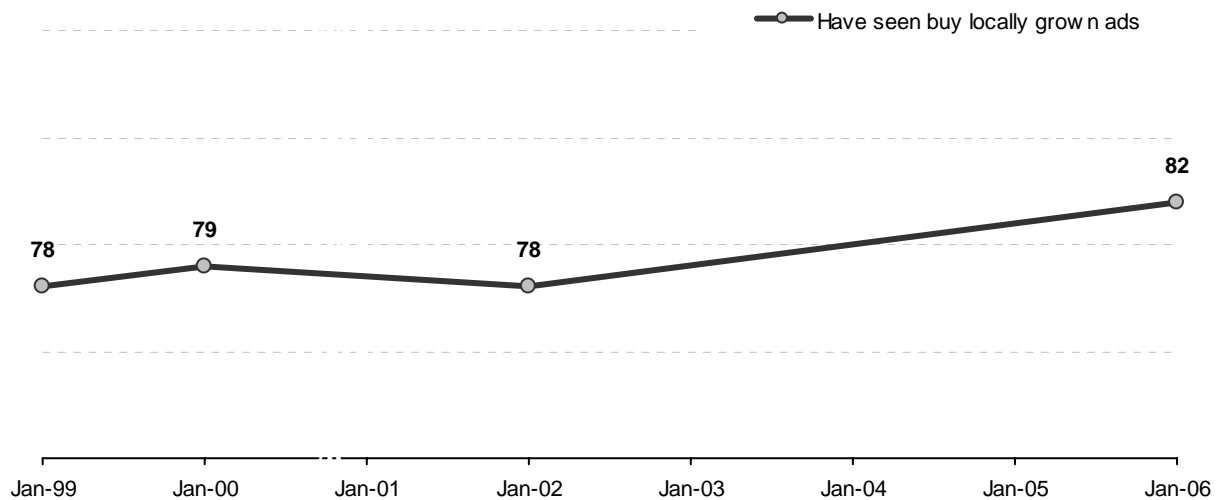
- **Continue to drive home the message about buying locally grown food with the slogan Be a Local Hero, Buy Locally Grown.** Awareness of the slogan has increased dramatically and the message about helping the local economy continues to penetrate, offering a reason to buy locally grown food in addition to freshness, the attribute consumer recognize as intrinsically.
- **Open a second front with a message about locally grown food being healthier.** While continuing to drive home the Be a Local Hero, Buy Locally Grown slogan with its local economy message, we would recommend that CISA begin to open a second front focused on health. Multivariate regression analysis from this survey suggests that although helping the local economy is the best predictor of whether consumers find CISA's message persuasive, *keeping people healthy with fresher food* is the best predictor of how frequently consumers actually purchase locally grown food.
- **Go where the consumers are.** Consumers in the Pioneer Valley overwhelmingly buy their food from large grocery stores and supermarkets. Ease, accessibility and one-stop shopping are important to them. While consumers are aware that buying from roadside stands and farmer's markets help support local agricultural producers, they only tend to buy their food from these locations less than once a month. Without downplaying the importance of these alternative shopping outlets, we strongly encourage CISA to continue to push the grocery store angle for locally produced food.

## Strong Ad Penetration

CISA's "Be a Local Hero, Buy Local" campaign continues to penetrate broadly and, if anything, has increased since 2002. An exceptionally high 82 percent of consumers recall seeing advertisements about buying locally produced food. As the graph below illustrates, this is on par with the previous 4 surveys and if anything, a bit higher.

■ **Graph A:** Exceptionally high number of consumers have seen buy local ads

### Exceptionally high number of consumers have seen buy local ads



College educated women (90 percent), college educated consumers older than 50 (96 percent) and self-described liberals (89 percent) display the highest awareness of buy local advertisements.

### The Ad Campaign's Theme Comes Through Clearly

Not only is awareness of the campaign high, but the campaign's theme comes through very clearly to consumers. Fully, 76 percent of consumers recall the ad campaign's theme to be about its slogan, with 51 percent saying the campaign's main theme is buy local/locally grown (48 percent) or be a local hero (3 percent). Another 25 percent point to supporting local farms (19 percent) or local businesses (6 percent) as the campaign's theme. Just 13 percent point to local food being fresher as the campaign's theme, despite the fact that freshness is the main reason consumers buy locally produced food. This is clear evidence that consumers recollect CISA's campaign and are not merely providing an easy answer.

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**■ Table A:** Consumers identify theme of messaging

### Consumers identify theme of messaging

<b>Campaign Slogan</b>	<b>51</b>
Buy local/locally grown	48
Be a local hero	3
<b>Support local economy/farms</b>	<b>25</b>
Support our local farms/farmers	19
Support local economy/business (no mention of farms)	6
<b>Fresher</b>	<b>13</b>
<b>Specific foods/food categories</b>	<b>7</b>
Local fruits and vegetables	3
Local strawberries	3
Local blueberries	1
<b>Organic</b>	<b>5</b>
<b>Healthier</b>	<b>3</b>
<i>"What do you think was the major theme of the advertising?"*</i>	
<i>*Only those (83 percent) who reported seeing the advertising were included</i>	

Looked at another way, when consumers are asked not about themes, but about what specifically they recall seeing or hearing, four key sets of responses emerge: 1) the campaign's slogan/theme/sponsor, 2) the media outlet where they recall hearing/seeing the advertisements, 3) the vendors who sell locally grown food, and 4) specific foods. Again, the absence of freshness is noteworthy, the efficacy of which is discussed later in this report.

■ **Table B:** Consumers recall what they have seen about buying locally grown

Consumers recall what they have seen about buying locally grown

<b>Campaign Slogan/Theme/Sponsor</b>	<b>37</b>
Buy locally	17
Be a local hero	11
CISA	5
Support local farms	4
<b>Vendors</b>	<b>29</b>
Farmers' Markets/stands	18
Grocery stores	9
Farms	2
<b>Media Outlet</b>	<b>28</b>
Newspapers	11
Bumper Stickers	7
Billboards	6
TV	2
Radio	2
Stickers	0
<b>Specific Foods</b>	<b>21</b>
Crop information	8
Strawberries	6
Milk	3
Blueberries	2
Asparagus	2
<i>"What have you seen, read, or heard [about locally grown food]?"</i>	
<i>*Only those (83 percent) who reported seeing the advertising were included</i>	

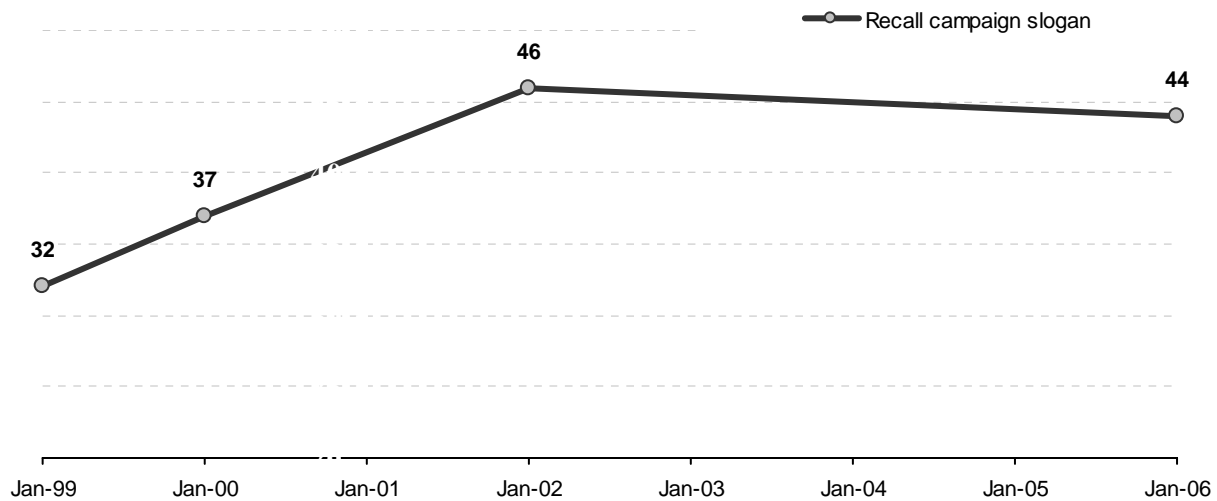
Increasing Recall of the Slogan: The Cumulative Impact of Advertising

Remarkably, 44 percent of consumers correctly recall the slogan of the campaign or part of the slogan (30 percent Be a Local Hero, 14 percent Buy Locally Grown). This is a stunningly high number for a campaign that has been waged by and large without television advertising.

Moreover, as the graph below illustrates, recall of the campaign's slogan has increased significantly since the campaign started 7 years ago.

**Graph B:** Recall of campaign's slogan has increased dramatically

**Recall of campaign's slogan has increased dramatically**



Consumers under 65 recall the campaign's slogan most, while seniors recall it least.

**Table C:** Recall of campaign's slogan lowest among seniors

**Recall of campaign's slogan lowest among seniors**

Age	18-39	39-49	50-64	65+
Percent	49	54	47	28

Additionally, 15 percent recall CISA as the sponsor (up from 9 percent in 2002), while another 4 percent mention CSA as the sponsor. Sponsor recognition is highest in Franklin County (21 percent CISA and 7 percent CSA) and among liberals (21 percent CISA and 5 percent CSA).

## Newspaper and In-Store Advertising Strongest Penetration, Along with Bumper Stickers

Without prompting, 43 percent recall newspaper advertising on buying locally produced foods, a number that bumps to 60 percent when consumers are prompted. Another 27 percent recall in-store advertising unprompted, expanding to 64 percent with prompting.

Consumers are less inclined to recall farm guides (9 percent unprompted, 33 percent aided) and promotional events (40 percent aided).

One key finding from this study is that 78 percent recall seeing bumper stickers saying Be a Local Hero, Buy Locally Grown when prompted. Only 5 percent mention it unprompted, but we suspect this is because the question asks about advertising and many consumers do not think of bumper stickers as advertising.

As the table below illustrates, women and seniors are far more likely to recall newspaper advertising, while men are more likely to recall radio advertising. Consumers under 40 are more likely to recall in-store advertising.

■ **Table D:** Unaided recall where advertising was seen

### Unaided recall where advertising was seen

	<b>Total</b>	<b>Men</b>	<b>Women</b>	<b>18-39</b>	<b>65+</b>
Newspaper	43	35	47	23	69
Grocery Store	27	22	29	39	10
Radio	12	20	9	13	4
Farm Guide	9	12	8	13	4
Billboard signs	7	7	7	8	8

*"Where did you see, read, or hear [advertising for locally grown foods]?"*

## Campaign Is Having A Pronounced Impact

The evidence from this survey suggests that the campaign is having a significant impact of consumer attitudes and behavior. This is circumstantial evidence as we could not conduct a randomized experiment where some consumers were exposed to the advertising and others were not, but the circumstantial evidence is strong.

First, consumers continue to report that the advertising was convincing and influenced their behavior. Fully, 83 percent feel that the Be a Local Hero, Buy Locally Grown advertising is convincing, including 40 percent who find it very convincing. And 65 percent report that the advertising has influenced them to buy locally grown food, a significant number considering that



people are generally reluctant to admit that advertising influences their behavior. These numbers are consistent with those from 2002.

Second, the behavioral differences between those who have and have not seen advertising is significant. Likewise, the response to the advertising from those who buy locally grown food more often is compelling.

- 99 percent of those who recall seeing or hearing ads buy locally grown foods compared to just 80 percent of those who have not seen ads
- 70 percent of those who have seen ads buy locally grown foods every week compared to 30 percent of those who have not seen ads
- 46 percent of those who purchase locally grown food every week find the ads very convincing compared to 31 percent of those who purchase locally grown foods less often
- Those who have seen ads shop at farmers' markets 12 times a year on average, compared to 4 times a year for those who have not seen ads.
- Those who have seen ads shop at roadside stands 16 times a year on average compared to 9 times a year for those who have not seen ads.

Women (44 percent very convincing) find the ads more persuasive than men (30 percent) and women (68 percent) are more likely to say the ads influenced them to buy local. Women older than 50 are mostly likely to find the ads very convincing (54 percent).

Consumers in Franklin County (76 percent) are more likely than those in Hampshire County (60 percent) to say the advertising has influenced them to buy local. Similarly, liberals (69 percent) are more likely than conservatives (60 percent) to report that the advertising has influenced them to buy local.

## Buying Locally – A Look at the Who Buys Locally, How Often and Where

In sum, 95 percent of consumers in Franklin and Hampshire counties report buying locally grown food, including 64 percent who purchase it at least weekly. College-educated consumers and liberals buy locally grown food most often, as is clear from Appendix A.

Not surprisingly, consumers shop most frequently (about once a week on average) at large grocery stores, followed by small grocery stores (bi-weekly on average). This points to the importance of encouraging grocery stores to sell locally produced food. As demonstrated below, consumers shop at roadside stands and farmers' markets to some degree, but far less frequently.

■ **Table E:** Exceptionally high number of consumers have seen buy local ads

Exceptionally high number of consumers have seen buy local ads

	At least weekly	Bi-weekly/ less than weekly	Monthly/ less than bi-weekly	Less than monthly	Never
Large Grocery Stores	38	26	23	10	2
Small Grocery Stores	15	9	19	26	27
Convenience Stores	11	8	14	30	35
Wal-Mart	9	6	18	24	41
Roadside Stands	6	9	28	37	18
CSA's	4	5	14	18	51
Farmers' Markets	4	6	22	35	30
Food Cooperatives	3	3	6	14	68

*"Now, I am going to read a list of places you can buy food. For each one, please tell me approximately how many times you have shopped there for food in the last twelve months."*

Franklin County consumers are more likely to shop at farmers' markets (16 times per year) and at roadside stands (19 times per year) than those in Hampshire County (farmers' markets 9 times a year, roadside stands 13 times a year). College-educated consumers older than 50 are most likely to shop at farmers' markets (18 times per year).

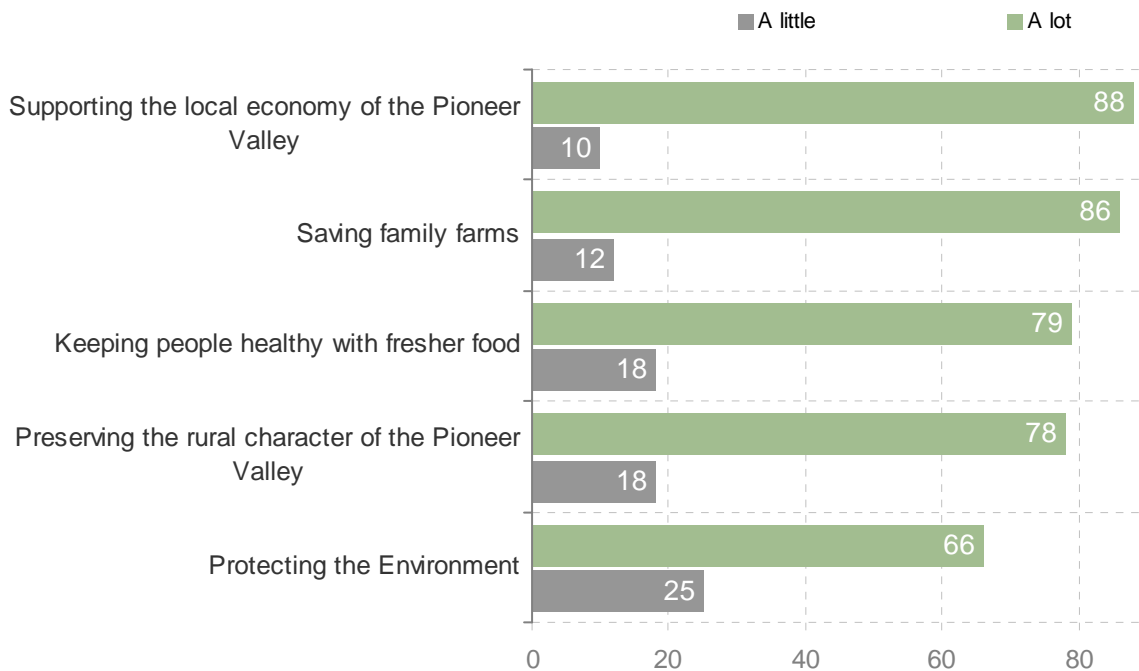
### Stay on Message, But Broaden It

CISA's message of Be a Local Hero, Buy Locally Grown has been successful over the last 7 years. Consumers increasingly recall the campaign's slogan. They understand the message – you can help local farms and the local economy by buying locally grown food. They tell us it is persuasive. Furthermore, we conducted multivariate regression analysis that shows holding all other variables constant, the message about supporting the local economy and protecting family farms in the Pioneer Valley is the strongest predictor of whether people find the advertising persuasive.

Consumers now believe that buying locally grown food does, in fact, strengthen the economy and save family farms, as shown below.

■ **Graph C:** Consumer belief that buying locally accomplishes positive goals

**Consumer belief that buying locally accomplishes positive goals**



*Now, I am going to read you a list. For each item on the list, please tell me whether you think buying locally produced food helps achieve this goal a lot, a little, or not at all.*

And they find the local economy message persuasive, second only to a message about locally grown food being fresher.

■ **Table F:** Consumers buy locally because it is fresher, supports local economy

Consumers buy locally because it is fresher, supports local economy

	<b>Much more likely</b>
It is fresher and better quality than food imported from other states and countries	81
It supports the local economy of the Pioneer Valley by keeping farms in the community and providing revenue to local businesses	79
It supports our communities' endangered family farms	74
It is better for the environment because it does not require lots of gas to transport it here	73
It is safer and healthier because small, local farmers use fewer chemicals to produce food	68
It maintains the Pioneer Valley's quality of life, like our rural landscapes and access to fresh food	67
It helps protect the environment of the scenic Pioneer Valley because local farmers use fewer of the pesticides and chemicals that pollute our drinking water, rivers, and streams	66

*"Now, I am going to read you a series of statements about food that is produced in your local community. For each statement, please tell me if it makes you much more likely to buy locally produced food, somewhat more likely, or does it make no difference to you?"*

At the same time, consumers continue to rate freshness as the most important reason they buy locally grown food. However, we concur with your findings from 1999 that freshness is an attribute consumer already associate with locally grown food and the key here is introducing new information. In fact, while freshness is the dominant reason to buy locally grown food for those who do so less than weekly, helping the local economy and local farms is nearly on par with freshness for those who buy locally every week.

■ **Table G:** Consumer belief that buying locally accomplishes positive goals

### Consumer belief that buying locally accomplishes positive goals

Reasons to buy local	Total	Buy Weekly	Buy Less than Weekly
Freshness	58	55	62
Support local farms/local economy	40	46	31
Organic/sustainable	8	12	2
Less expensive	7	4	12
Locally grown	5	7	2
Healthier	5	6	2

*“When you buy locally produced food, what is the most important reason you do decide to buy food that is locally produced?”*

Moreover, among those who recall the ad slogan, 64 percent point to supporting the local economy or local farms as the principal reason they buy locally grown foods, compared to only 31 percent for those who do not recall the slogan (64 percent of them point to freshness).

### Introducing a Health Component to the Message

While continuing to drive home the Be a Local Hero, Buy Locally Grown slogan with its local economy message, we would recommend that CISA begin to open a second front focused on health. As you well know, consumer food marketing is increasingly pointing to the health benefits of products. Regression analysis from this survey suggests that although helping the local economy is the best predictor of whether consumers find CISA’s message persuasive, *keeping people healthy with fresher food* is the best predictor of how frequently consumers actually purchase locally grown food.

We are not suggesting that CISA abandon it’s slogan or message. Far from it, we believe your message discipline and reinforcement of one consistent, compelling message explains the success of your campaign. However, the evidence from this survey suggests that more market share is available if you are able to open a second front in your communications. We recognize that this may require additional resources to avoid diluting your message.

We will leave it to those more qualified to develop a slogan, but something along the lines of “Buy Locally Grown: Better for You, Better for our Community” could represent the second front in this campaign.

## Media Consumption

The combination of newspaper, in-store and radio advertisements continues to be the strongest way to reach consumers. As the table below illustrates, grocery store advertisements or circulators in the newspapers and posters or signs in grocery stores are the most relied on source of information on food shopping.

Promotional events, mailed brochures, television and radio are on the next tier. Billboards and bus advertising are less recognized and the Internet is not yet relied on as a major source of information on food.

■ **Table H:** Consumers most receptive to newspaper and grocery store advertising

### Consumers most receptive to newspaper and grocery store advertising

Media Source	Major source	Minor Source
Grocery store advertisements or circulators in the newspaper	53	28
Posters or signs in grocery store	43	36
Promotional events of any type at grocery stores, fairs, or other events	30	41
Brochures mailed to your home	26	38
Radio advertising	21	38
Television advertising	21	43
Billboards	13	36
Advertising on or in a bus	7	22
The internet	5	21
Email newsletters	5	19

*"Now I am going to read you a list of ways people get information about food shopping. For each one, please tell me whether this is a major source of information for you on food buying, a minor source, or not a source at all."*

## Appendix A:

### ■ Table I: Consumers buy locally at least once a week

#### Consumers buy locally at least once a week

	Buys Locally at Least Weekly
<b>Total</b>	<b>64</b>
Men	63
Women	65
High School or less	56
Completed some college	60
College Graduate	70
Hampshire County Residents	64
Franklin County Residents	64
Annual income less than \$30,000	59
Annual income between \$30,000-\$50,000	67
Annual income between \$50,000-\$75,000	70
Annual income \$75,000 and above	68
Liberal	74
Moderate	56
Conservative	59

*"How often do you buy locally produced or grown food – every week, once or twice a month, several times a year, or hardly ever?"*

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## Appendix B:

■ **Table J:** College-educated consumers more likely to have seen ads to buy locally grown

College-educated consumers more likely to have seen ads to buy locally grown

	College Men	College Women	Non-College Men	Non-College Women
Bumper Stickers	82	86	74	69
Produce Department	62	71	56	59
Local Newspaper	59	65	49	60
Promotional Events	40	44	27	42
Farm Guides	30	46	25	24

*"As you may know, recently there was advertising in your area about the benefits of buying locally grown food. I am going to read you a list of different types of advertising that appeared. Please tell whether you recall seeing, hearing or reading about each."*