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How COVID-19 Changed Local Food Shopping Habits

What we've learned

and

A toolkit for customer messaging

June 30, 2022

Written by

Claire Morenon

Jacob Nelson

Contributors

Jennifer Williams

Margaret Christie

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Introduction

Throughout the first year of the COVID-19 pandemic, local farms were managing market disruptions and implementing new systems to keep staff and shoppers safe amidst immense uncertainty. Many of them also saw a notable increase in demand from local shoppers. At CISA, we have worked to understand the primary motivations behind this increase, how shoppers' habits changed as the pandemic continued into 2021, and how they may continue to change over time.

In this document, we aim to:

1. Shed light on motivations behind evolving consumer shopping habits since the onset of the COVID-19 pandemic.
2. Share messaging strategies that farms and other local businesses can use to retain new customers and increased demand from existing customers.

In the summers of 2020 and 2021, CISA worked with a small group of direct-sales farms and local food delivery businesses to conduct shopper surveys. Nine local farms and delivery services sent CISA's survey out to customers in 2020, and 10 did so in 2021. Eight of these businesses participated in both years. Surveys were conducted online, and respondents had to opt in, which means that this is a self-selected group of participants who were motivated and able to share their opinions on this topic. In 2020, a total of 723 surveys were completed, and in 2021 a total of 676 were completed.

CISA also shared the contact information of respondents who opted to share it with two research groups – one led by PhD student and professor Kristen Whitmore of UMass Amherst, and one by Dr. Cathy Stanton of Tufts University. Both conducted related investigations and shared their findings with CISA. Links to these studies, as well as CISA's survey findings from 2020 and 2021, are provided at the end of this document. Altogether, this research, bolstered by anecdotal information from local farmers, informs this document.

Findings

Why did people change their shopping habits? Our research points to these main motivations (in order of significance):

1. **Wanting to support and feel connected to local businesses**
2. **COVID-19 safety**
3. **Convenience/availability**
4. **Aligning actions with values**

In the beginning: initial motivations for change

CISA's summer 2020 survey focused on motivations behind customer purchasing choices at that specific moment of upheaval. One key question asked respondents why they chose to buy from that particular farm or business, and 75% of respondents chose "I want to support local businesses during this crisis" as one of their top motivations (respondents could choose multiple options). Leaving aside longtime customers who were simply continuing to purchase from that business, the next top three motivators were focused on safety in the face of the pandemic. Trailing behind were convenience and supply chain concerns.

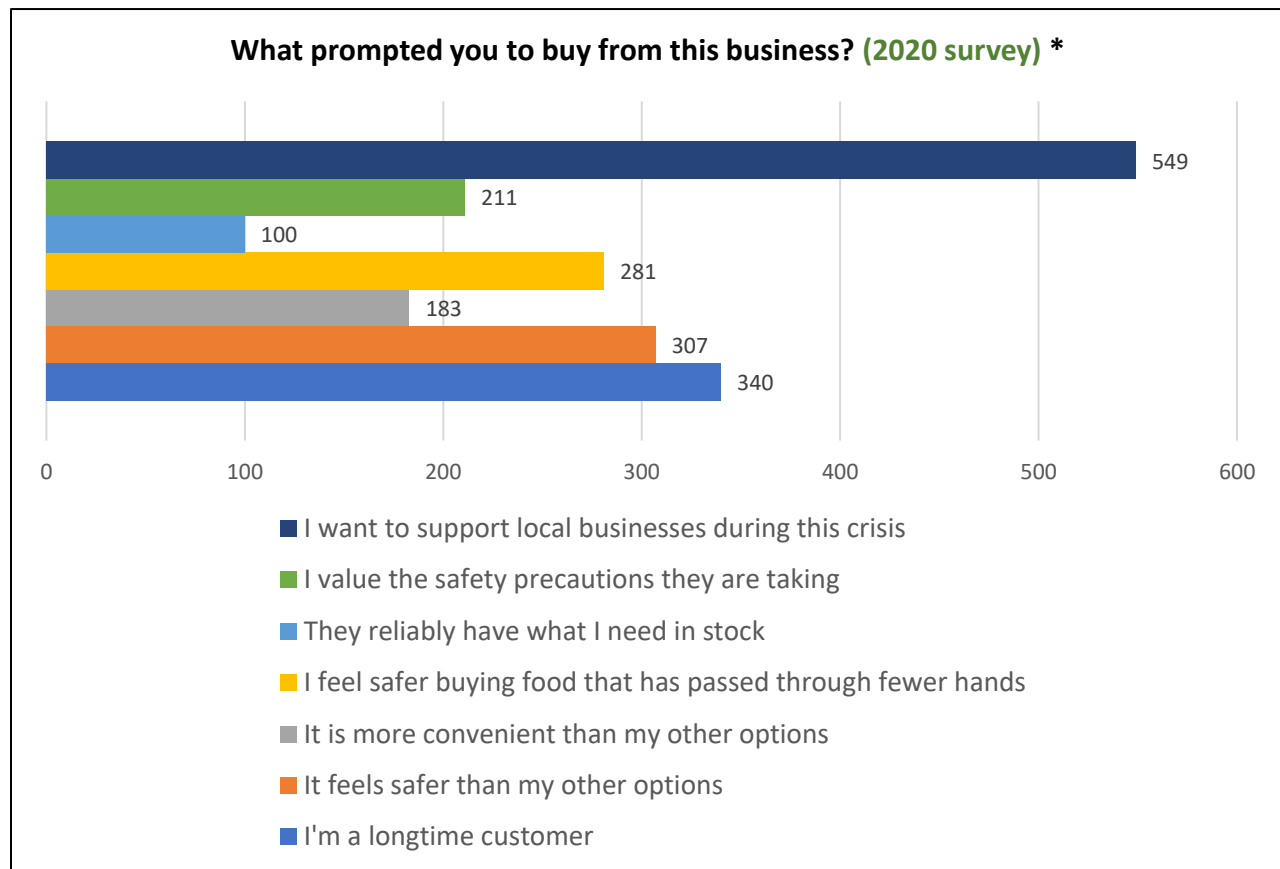


Figure 1

*This question allowed for multiple responses.

Similarly, in 2021, respondents were asked to reflect on why their purchasing habits had changed when the pandemic began. They recalled a desire to support local businesses during the crisis as a primary motivator. Again, safety concerns were highly ranked, followed by supply chain concerns and a new option, which was “My routines changed (commuting routes, school or work schedule, etc.).”

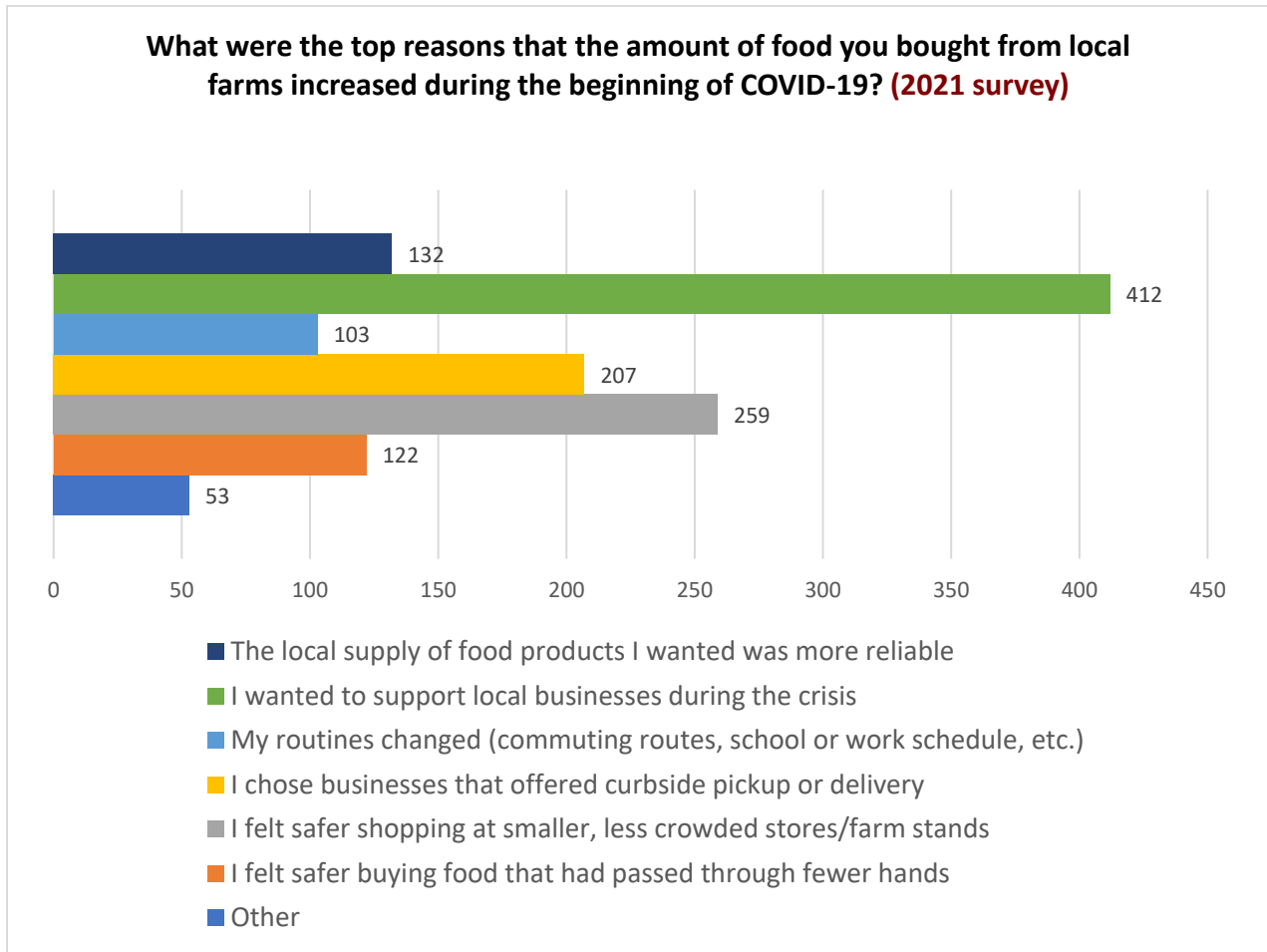


Figure 2

*This question allowed for up to three responses

Changing behaviors throughout the pandemic

In CISA’s summer 2021 survey, we asked people how their shopping choices then compared to both their pre-pandemic and early pandemic habits, AND to reflect on their motivations throughout. As seen in figure 3 below, most respondents – 62% – indicated that their local purchasing increased because of the pandemic and has remained higher than before. Most of the rest – 28% – said that their local food purchasing hadn’t changed much throughout.

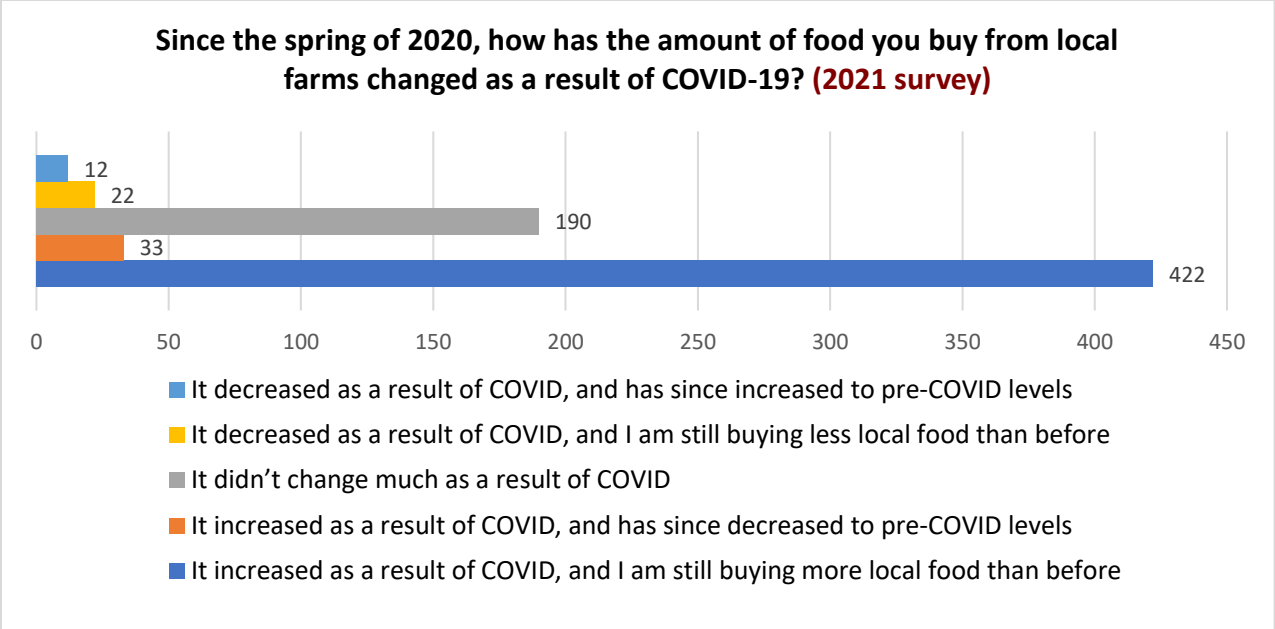


Figure 3

Why some new customers didn't stick

In 2021, we were especially interested in the small group of respondents – 5% – who had increased local purchasing during the pandemic, but who had not maintained that change. Here's what they had to say:

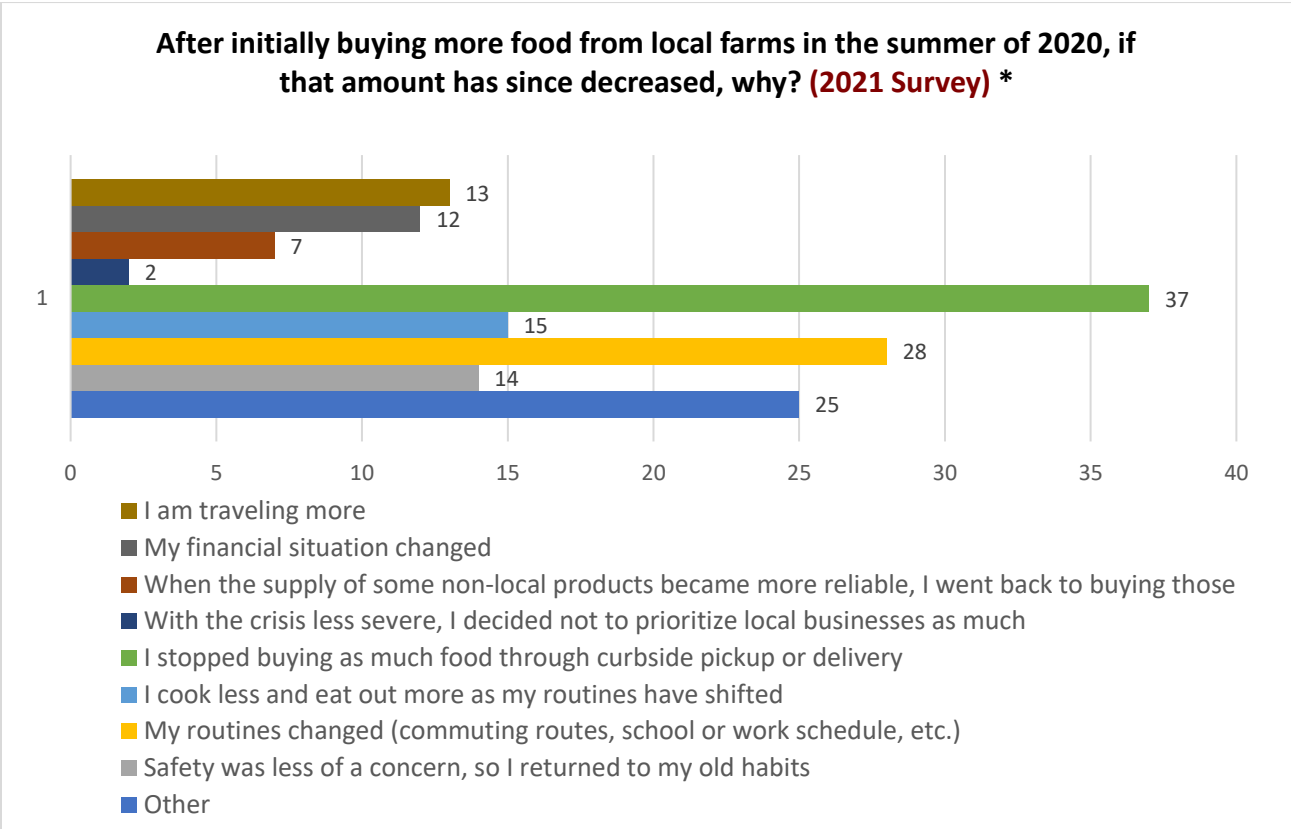


Figure 4

*This question allowed for up to three responses

Their answers were somewhat predictable: peoples’ lives changed, largely for reasons connected to the pandemic, and they returned to old habits or found options that better fit current needs. Routines – like commuting, school, and work schedules – shifted again in the second year of the pandemic, vaccines and more information about how COVID-19 spreads made people more comfortable returning to grocery stores, and travel picked back up.

Why some new customers became regulars

We also asked respondents who increased their local food purchasing early in the pandemic and maintained it into 2021 (that 62% in fig. 3) how their behavior changed and why. Here’s what they said:

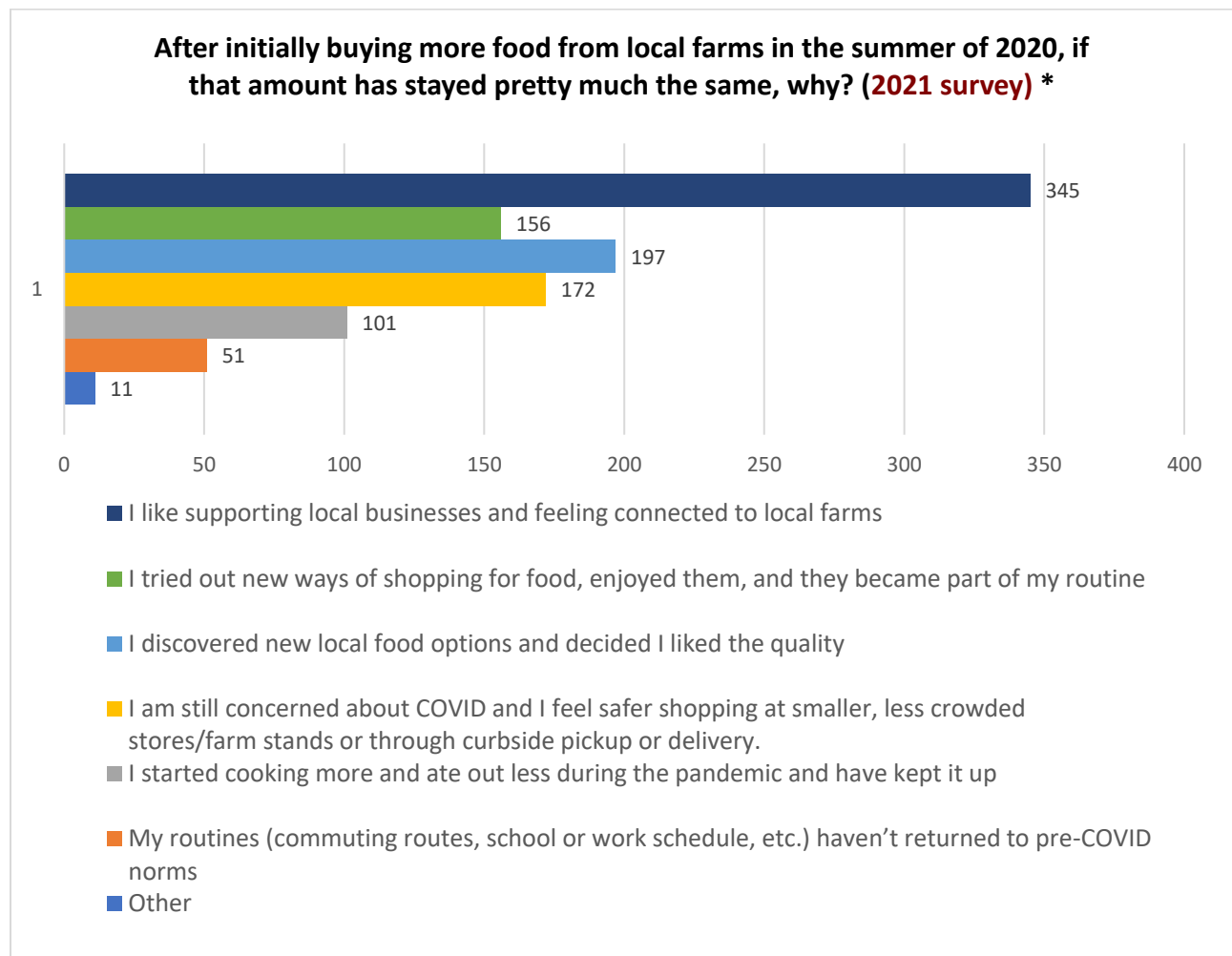


Figure 5

*This question allowed for up to three responses

The top response shown in fig. 5 was the same as the top reason all survey respondents gave for buying more local food during the pandemic: they want to support local businesses. Other popular options were about customers trying something new and discovering they liked it, as well as remaining concerns

about safety. Lower on the list were life circumstances – either routines or at-home cooking shifting because of the pandemic.

Further analysis also showed that customers purchasing directly from farms were almost three times more likely than delivery service customers to say routine shifts changed their shopping habits. That's understandable – a delivery service customer changing their commutes or schedule wouldn't affect how food got to their fridge.

Notes about online purchasing, curbside pick-up, and delivery

Many businesses started offering online purchasing for curbside pick-up or delivery in the early days of the pandemic. Much has been measured – and guessed at – regarding whether customers will keep using these services enough to warrant business continuing to offer them. Here's what CISA has learned:

- More people are buying food online. Nationally, surveys by the Local Food Systems Response to COVID-19 Research Group showed that the number of people who purchase some food online increased to 50% in 2020 and stayed at 50% in 2021 (research linked in "Further Resources" below.)
- People who buy food online have higher concerns about COVID-19 safety. That same national research found that, for direct-sales farms and companies delivering food boxes, people with higher COVID-19 safety concerns were 50% more likely to use online ordering for curbside pick-up or delivery. This aligns with CISA's research locally – our 2021 survey showed more new delivery service customers (17%) than new farm customers (11%) listed COVID-19 safety concerns as a top reason why their purchasing increased.
- People choose curbside pick-up more often for COVID-19 safety reasons, and delivery more often for convenience reasons. In earlier research especially, the two strategies were often studied together under the umbrella of "online ordering," but closer analysis by the Local Food Systems Response to COVID-19 Research Group shows key differences. People who purchase curbside want to reduce exposure to COVID-19 but are willing to drive to the farm or store. When COVID-19 risks retreat to their acceptable levels, they may well shop in person – it's no less convenient.

Meanwhile, people continuing to order online for delivery may care about COVID-19 safety, but also about convenience – that's the value added by this strategy. Moreover, CISA's 2021 survey showed delivery customers' local purchasing was three times *less likely* to be disrupted by changes to their routine as the pandemic shifted, perhaps making them more durable customers.

Conclusions

It's rare when so many people change their habits, which makes this an important moment for local businesses to capture. Nationally, surveys by the Local Food Systems Response to COVID-19 Research Group showed that 35% of respondents bought food from somewhere new in the early days of COVID-19. The numbers were about the same in CISA's surveys.

Much behavior change was motivated by fear and a need for safety. We cannot recreate these conditions (nor would we want to). Shoppers feared busy stores and looked to alternatives that were likely to be less crowded, like farm stands, or that offered no-contact shopping. As the pandemic has worn on, these fears have become less pronounced for most of us, either because of vaccines, more information about how COVID-19 spreads, or just pandemic fatigue.

Still, some behavior change was driven by motivations that we can encourage through messaging. Consistently, the most selected reason for shopping locally has been that people want to support local businesses and enjoy feeling connected to them. Are these values-based motivations strong enough to tip the scale against peoples' day-to-day logistical needs? For many the answer is no, but there's always a small group of shoppers for whom the answer is yes, if given a small push. Our research shows COVID-19 made that group bigger, and we believe there is a real opportunity to use targeted messaging to cement their participation in the local food economy.

Suggested Messages

1. Remind new consumers they've already done the work of trying something new and encourage them to keep at it.

Most of us are pretty habit-driven – it's a big deal when someone changes their normal shopping routines! Welcome newcomers warmly into the fold, and make it feel easy to keep coming back.

Examples:

- Reinforce how glad you are to see new people through signage and online communications.
- Make sure your business hours and any details about how to shop with you are clearly communicated on your website and social media. Don't put up any information barriers to welcoming people back!

2. Many customers accumulated new positive emotional experiences with local food. Draw attention to what they liked.

Remind them what feels good about the new way they're shopping. The joy of picking their own berries with their kids for the first time. The spark of human connection that brightened their evening commute as they stopped for dinner ingredients at the farm store. The fascination of discovering new kinds of produce in a CSA share, and sense of achievement learning how to cook them so their family loved it.

Examples:

- Ask your customers (on social media or in your store) to tell you about favorite food discoveries during the pandemic. Share the results.
- Talk more about joy that comes from engaging with your business and your food.

- Make it easier for customers to stick with a new behavior by sharing what you know. CSA farms sharing recipes for enjoying new ingredients is a good example of this.

3. Thank longtime customers for supporting you, and local agriculture, all along.

People respond well to appreciation and positive framing. Messages like “support local farms or else we’ll lose them,” or “we were there when you needed us, so now you owe us” can be effective in communicating a sense of urgency, but over time people respond better to positive messaging and gratitude than fear or guilt. Plus, seeding the idea that supporting local agriculture is the social norm can help encourage that behavior. No one likes being left out of a group getting thanked for doing something that seems socially desirable!

Examples:

- Messages like, “we were able to be here for you during a crisis because of the years of support we’ve gotten from people like you – thank you!”
- Using mutual aid framing: we all helped each other.

4. Don’t be a purist about local – reinforce the idea that buying local doesn’t have to be all or nothing, and everyone is welcome.

Follow-up interviews conducted by teams at Tufts and UMass showed that, even among people who had been buying local food, many are self-consciousness about not being “perfect” in their habits when they don’t buy something local. The reality is that most people who buy local are not purists – they buy food from around the world and eat out of season to varying degrees. While we always want to encourage people to buy more local food, it’s important to be careful not to set up an unattainable standard, even unwittingly.

Examples:

- Highlight how each local purchase matters. Every little bit counts.
- Share recipes that aren’t entirely based on local ingredients and invite your customers to share their own favorite ways to use your crops – especially if the non-local elements are time-savers (like, throw some kale on top if a frozen pizza!).
- If you highlight your customers publicly in any way – through your social media or newsletter – make sure you are choosing a diverse cross-section of customers, not just the most dedicated.

5. Show people how their connection to your business is part of the larger picture/movement.

People like to feel that their individual choices have a positive ripple effect. Highlight how your businesses connects to others in the “local food web,” as it were, whether that’s through sales relationships, idea or resource sharing, or just neighborly friendship.

Examples:

- Highlighting people – don’t just say “We have Phoenix Fruit Farm apples,” say “Our friend Elly and her team at Phoenix Fruit Farm grew these apples, and they’re delicious!”
- Be neighborly – when you’re not competing, share your insider knowledge of what’s in season and how people can get find it from neighboring farms and businesses. This positions you as a helpful ally to customers wanting to enjoy more local food. A rising tide lifts all boats.

Further Resources

If you'd like to dig deeper into how the pandemic impacted the local food economy, check out:

CISA's Research:

- Survey [results from 2020](#)
- Survey [results from 2021](#)

- Dr. Cathy Stanton and her Tufts students' [research findings](#): "Assessing consumer awareness of food systems issues through pandemic behavior changes."

- Kristen Whitmore and her UMass students' [research findings](#): "Experiences of Local Food Provisioning during the COVID19 Pandemic: Understanding Resilience in the Local Food System."

- The [Local Food Systems Response to COVID-19 Research Group](#) has many resources often drawing from national level research, including:
 - National [surveys on consumer shopping habits](#) in 2020 and 2021
 - Assessments of [how businesses have pivoted](#) by sector (direct-to-consumer farms, food hubs, etc.)

Feedback

Have any observations or feedback after reading this? Something we overlooked? Messaging strategies you're using that seem to be working? Related research ideas or technical assistance needs CISA could help with? **Please tell us!**

Contact:

- **Jacob Nelson** at jacob@buylocalfood.org
- **Claire Morenon** at claire@buylocalfood.org

We want to keep discussing what's happening with shopping habits and what's working to encourage local purchasing. CISA is excited to provide whatever guidance we can, and there's a lot more we can all learn from talking to each other.

THANK YOU

To all the local farmers, business owners, researchers, and eaters who made this work possible!