

Report On Retailing and Local Food in Orange and Chatham County 2009

Rudi Colloredo-Mansfeld, Ph.D.

Dorothy C. Holland, Ph.D

Meenu Tewari, Ph.D

UNC-Chapel Hill

How Can Grocery Stores Help Build Local Food Economies?

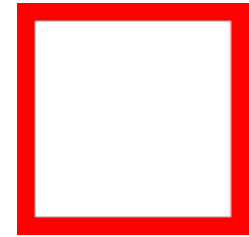
1. How do residents relate stores to their community?
 - How do consumer definitions of local match-up with retailer definitions?
2. What are the opportunities and shared interests among stores, growers, and shoppers?
 - What interests can be tapped to make local food more inclusive?
1. What are some examples of how growers and stores work together?

Consumer Research

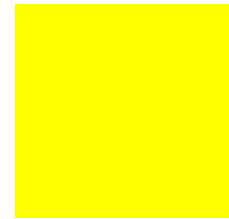
- Research Sample
 - 41 respondents
 - (Orange, Chatham, Buncombe)
 - Stratified sample across towns
 - (Hillsborough, Chapel Hill, Carrboro, Siler City, Pittsboro, Moncure, Fairview)
 - Diversify to include historically marginalized communities
 - (13 African American, 5 Latino, 1 Native American)
- Research Method
 - Interviews lasting between 20 and 40 minutes
 - Open-ended questions along with checklist of local purchasing

Mapping Community and Food Economy

Places that are part of weekly routine:



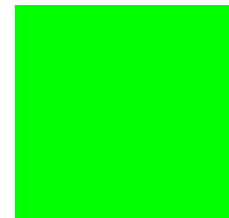
Places that define community:



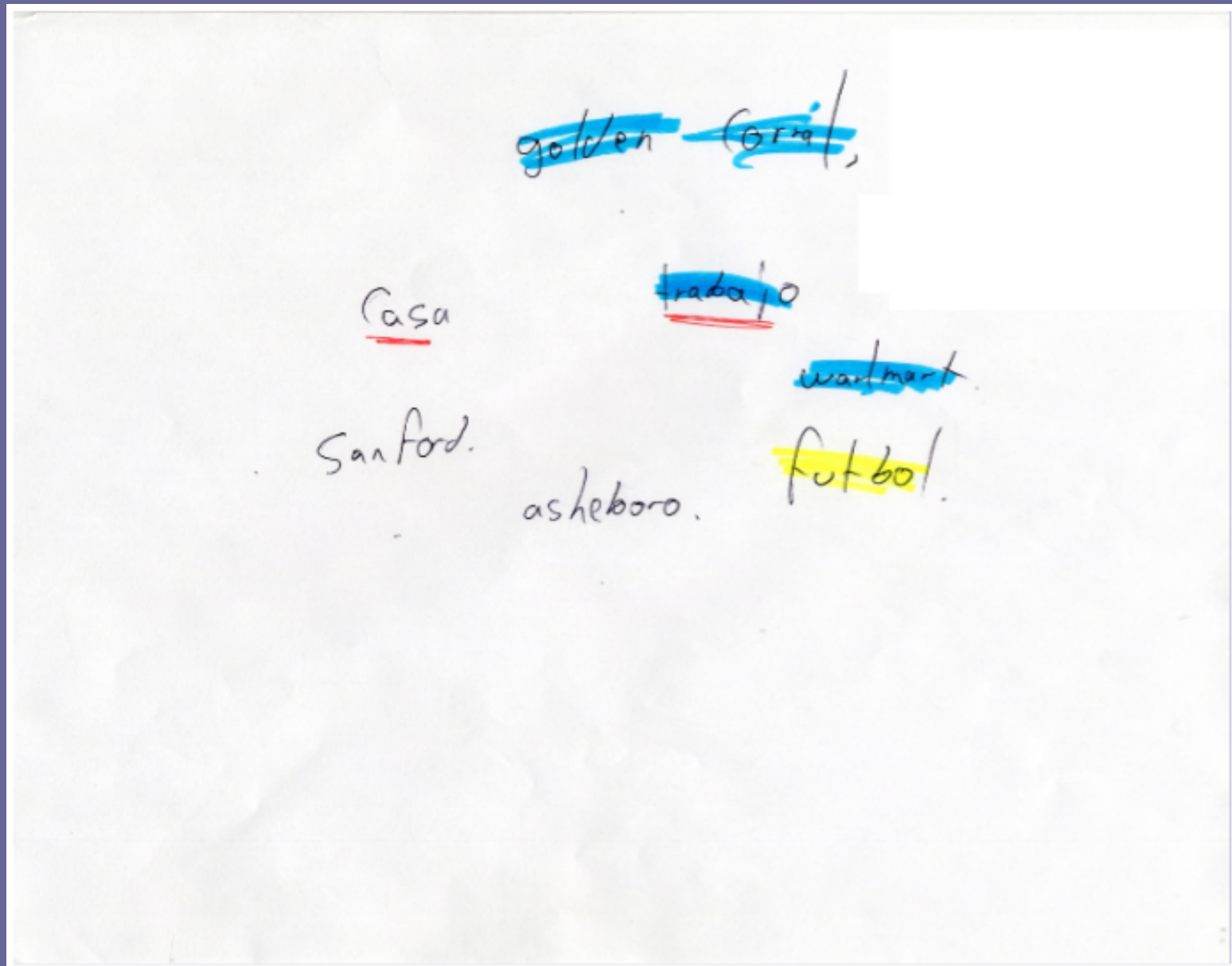
Places that are part of the food economy:



Food places that define community:

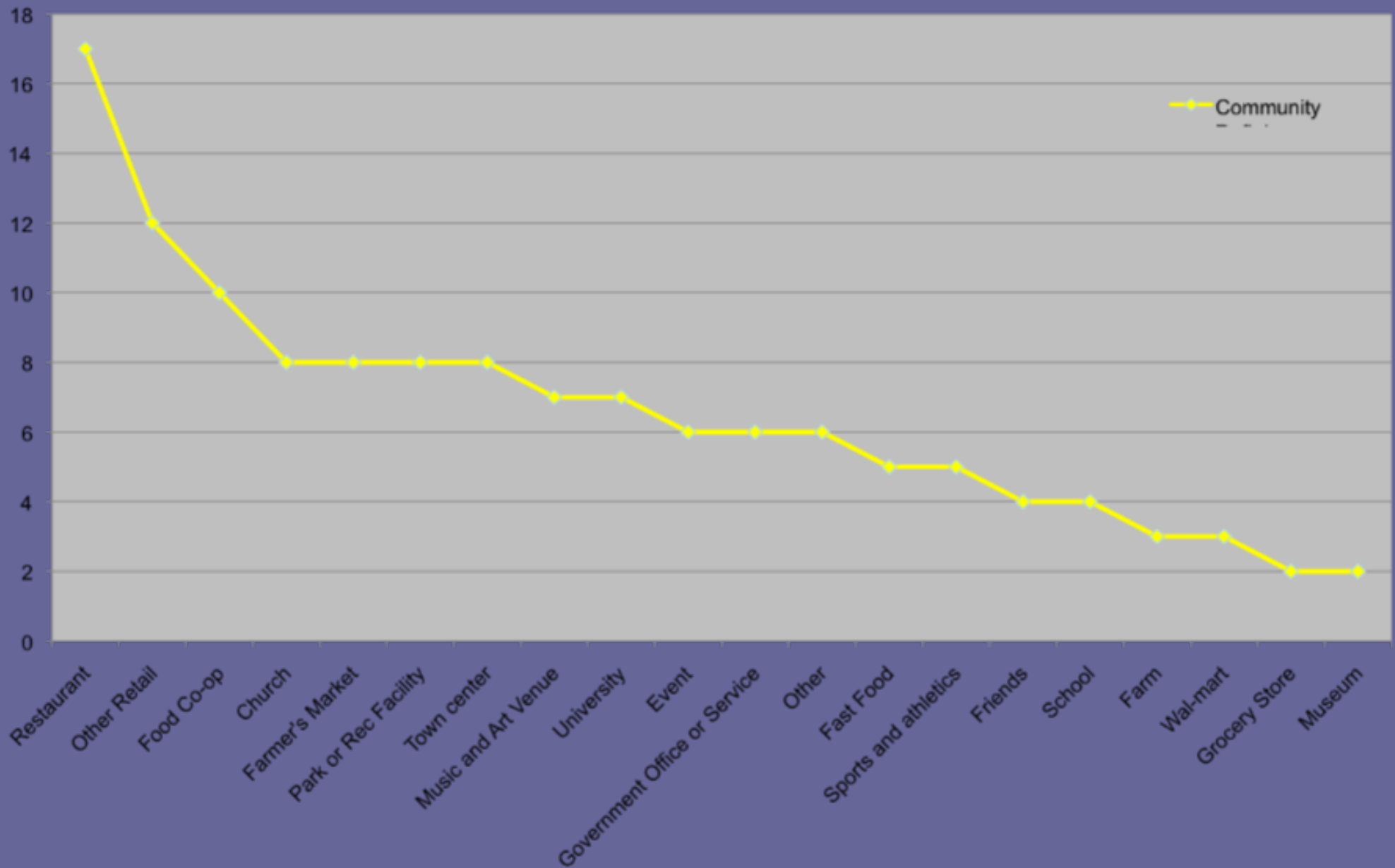


Consumer Views on Food and Community: Mapping one's hometown

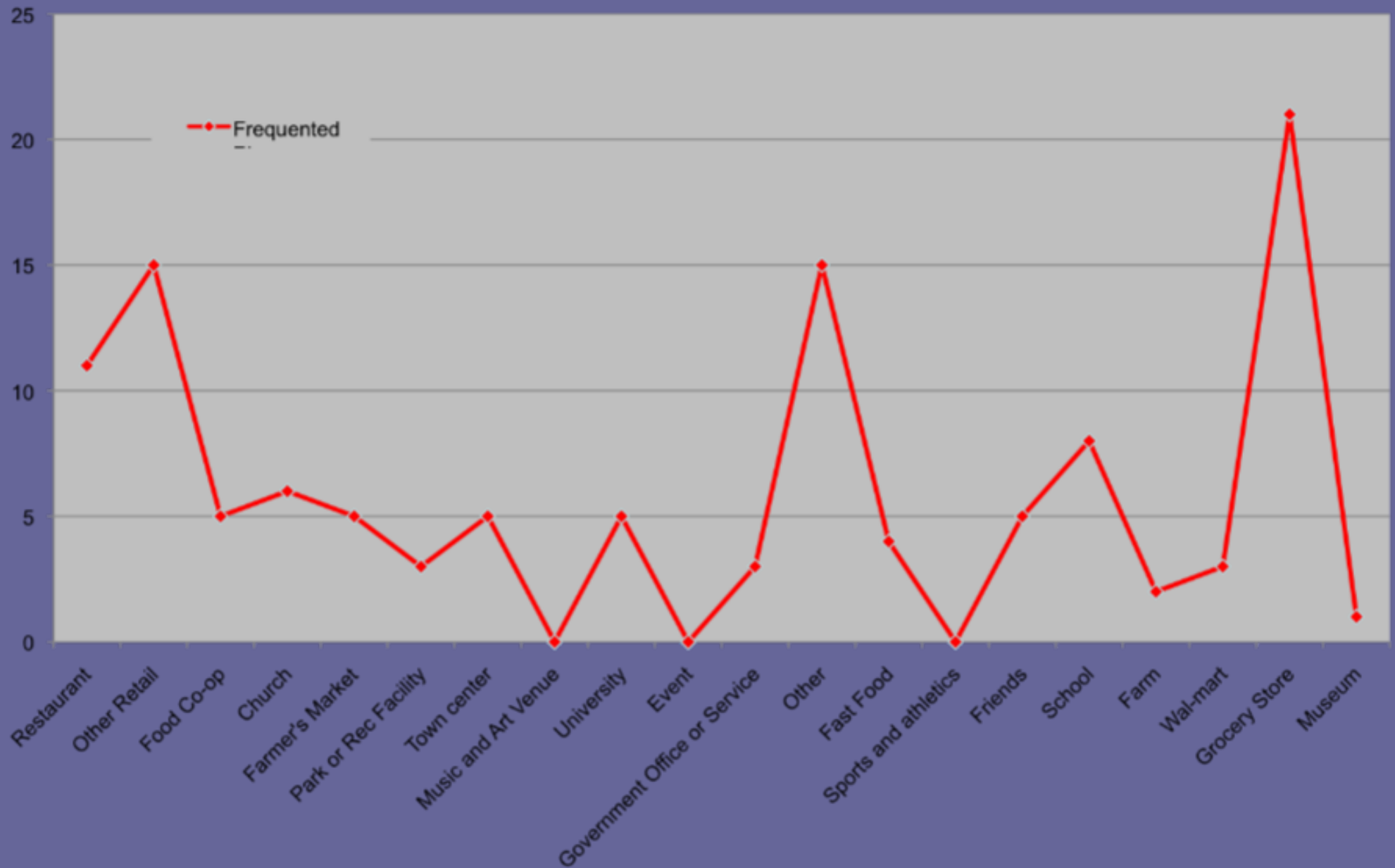




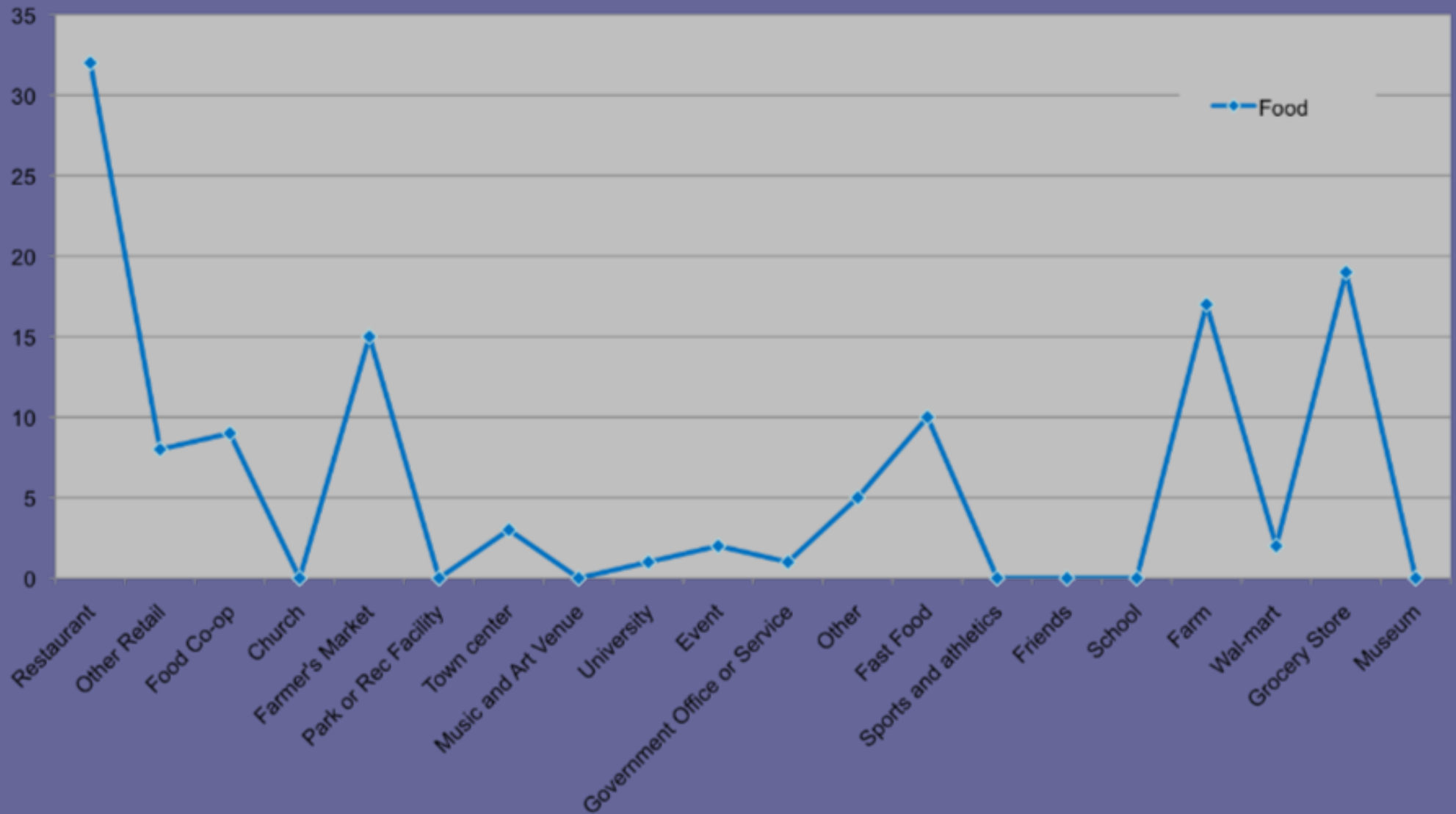
Cultural Assets within Community Food Systems: Places mapped as Community Defining



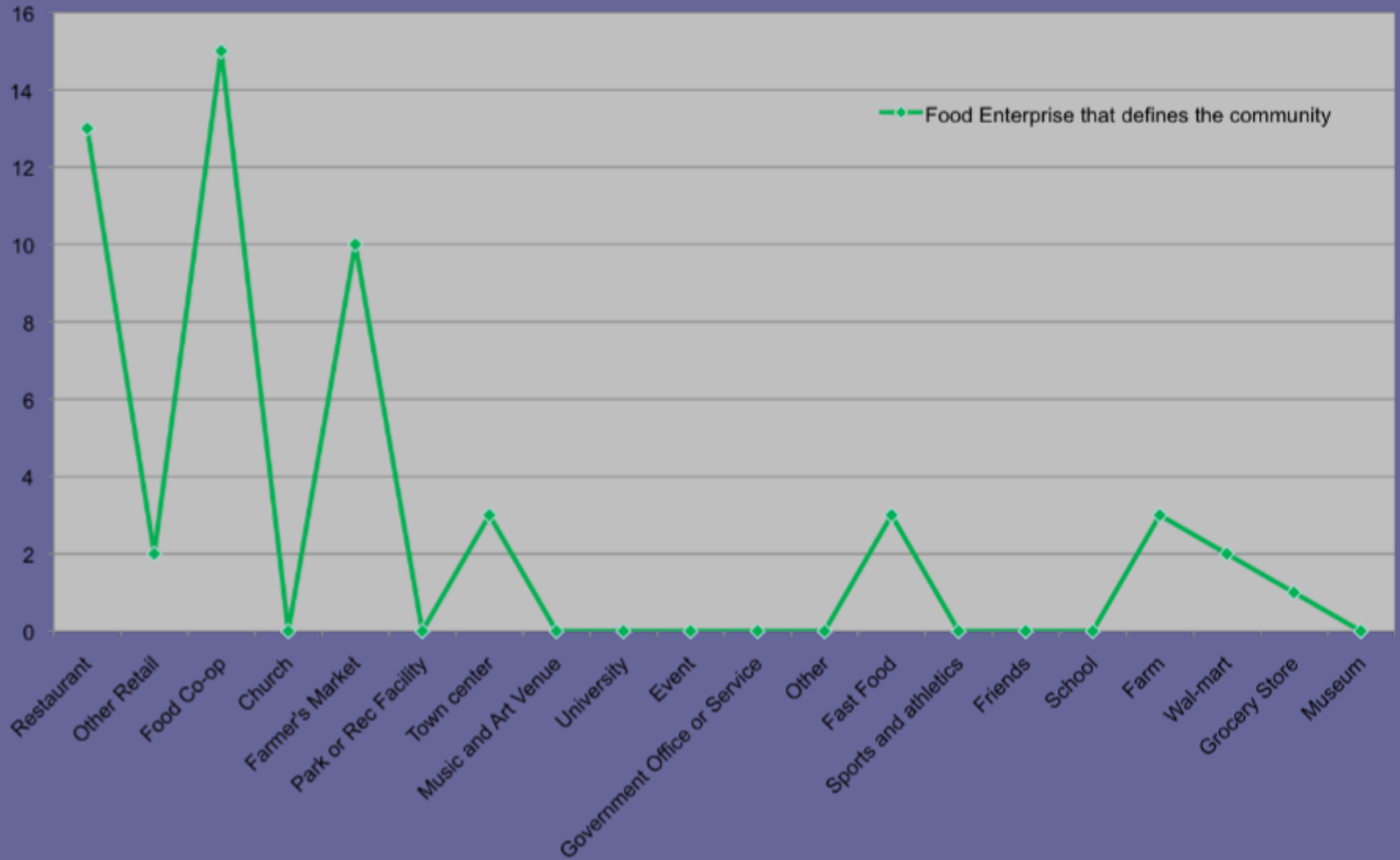
Cultural Assets within Community Food Systems: Places mapped as part of weekly routine



Cultural Assets: the town's food economy



Cultural Assets: Food enterprises that define community



Consumer Definitions of Local Food

Consumers cite one or more of four characteristics to qualify food as local:

1. Pertaining to hometown/county/state
2. Connections
3. Better or fresher quality
4. Small-scale and sustainable production

Hometown/county/state

- “Local food comes from a radius of 30 miles from my house.”
 - F, Carrboro, South Asian
- "Really in the perimeter of this community. But honestly, I think if it's within a few hours of you know or within the state ..., I would define it as local, especially as it relates to the global food economy. "
 - F, 48, Carrboro, White
- “Local food, it's the food they sell here...McDonalds, what one goes and eats sometimes, Burger King.”
 - 37, M, Siler City, Latino

Connections

- “Homegrown.”
 - 60, F, Chatham County, African American
- “From here, eaten here, produced here.”
 - 45, F, Hillsborough, White
- “Somebody that I know is local. A place that I either know or could go and know.”
 - 28, M, Pittsboro, White
- “[One of the reasons I support local farms is] to have a working landscape, where people are actually working on the farms.”
 - 57, F, Fairview, White

Quality and local food

- "From the farmer. It's healthy and tasty, and had time to grow and ripen naturally."
 - 72, F, Pittsboro, African American
- "You can almost taste the dirt of where [local fruits and vegetables] come from."
 - 33, M, Hillsborough, Native American
- "Anytime you get a locally produced food of any sort, it's going to be fresher because it has less travel, like a home grown tomato, mm. Eating a fish on the day it's caught, you know you can't beat these things."
 - 23, M, Chapel Hill, White

Production and local food

- "Fresh, not with the stuff that you spray on, pesticides."
 - 65, F, Moncure, African American
- "Locally grown things are grown with more love than other things that are all business"
 - 46, F, Siler City, Latina

Consumer Interest in Food Retailing:

Interviewer: “What is your favorite store?....”

Piggly wiggly in Pittsboro is cheaper, smaller, and has good quality food, good hours and people are nice

Weaver Street. It is here and it is walkable. It supports the community the people that work there are extremely helpful and they seem to be happy that they are working there.

Gosh, Wal-Mart.

Why is it your favorite?

Because it's the only thing I have! It's the closest, by the time I get to Pittsboro to the market, my kids will die in hunger.

Consumer Interest in Food Retailing:

The desire for grocery stores to serve as connectors...

“Honestly I would like Harris Teeter to be, like kinda like Weaver Street to be more a part of the community. I know it’s a chain grocery store but they could incorporate more local foods ... if they could become more like part of the community that would be really interesting and exciting. Like tables at Weaver Street, simple things like tables where you can buy your food and go outside and eat it.”

“Food Lion is a whole different thing, you know. When they put the sign up about schools only, I got really mad. That bulletin board is a source for Friends of the Library, for Food for Fairview...for the Fairview community. They’re kind of a central hub. And it really irritated me that they did that. ... It’s a corporate decision without really understanding that Food Lion is an important part of this community.”

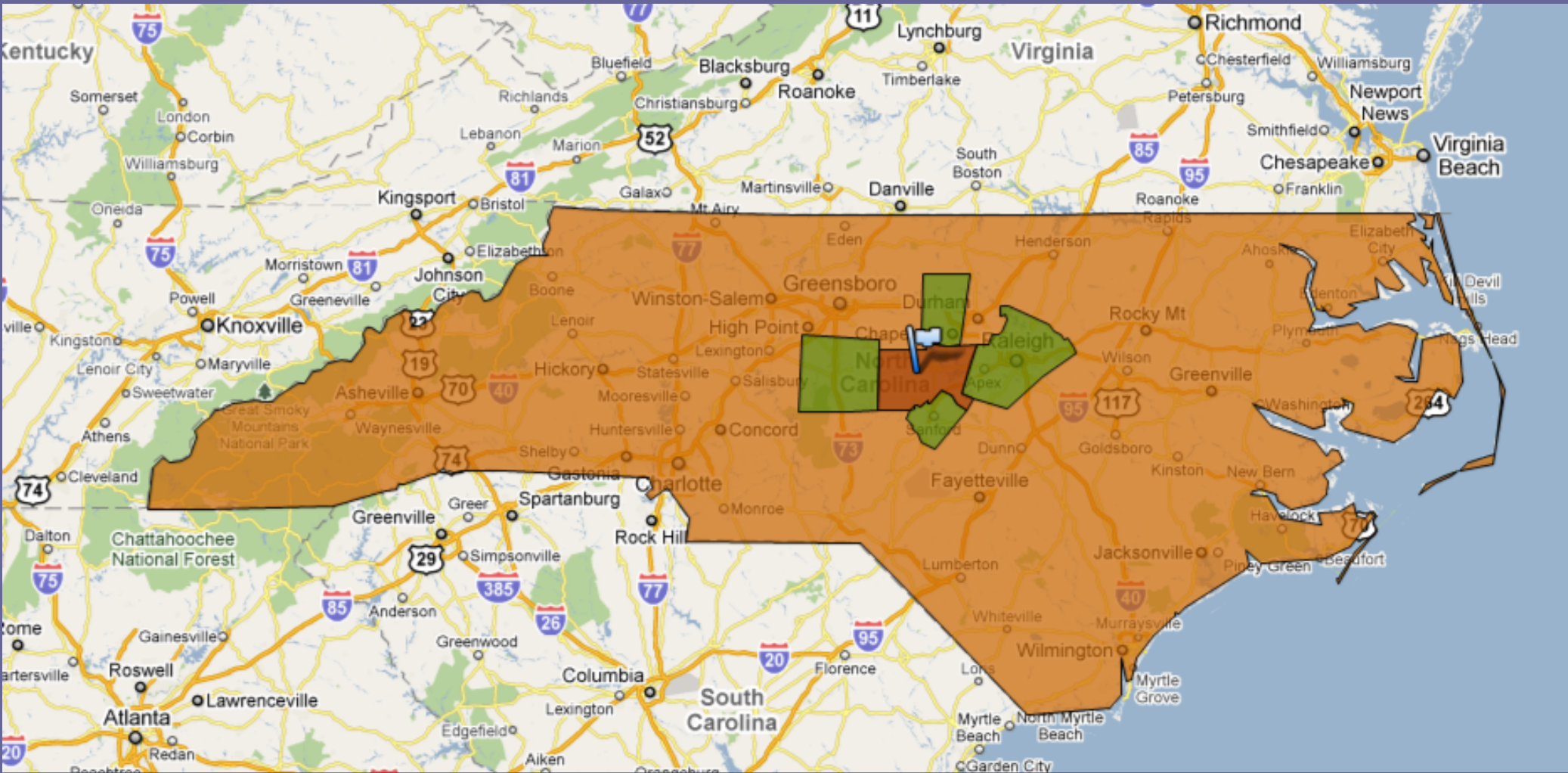
Retailer Research

- Research Sample

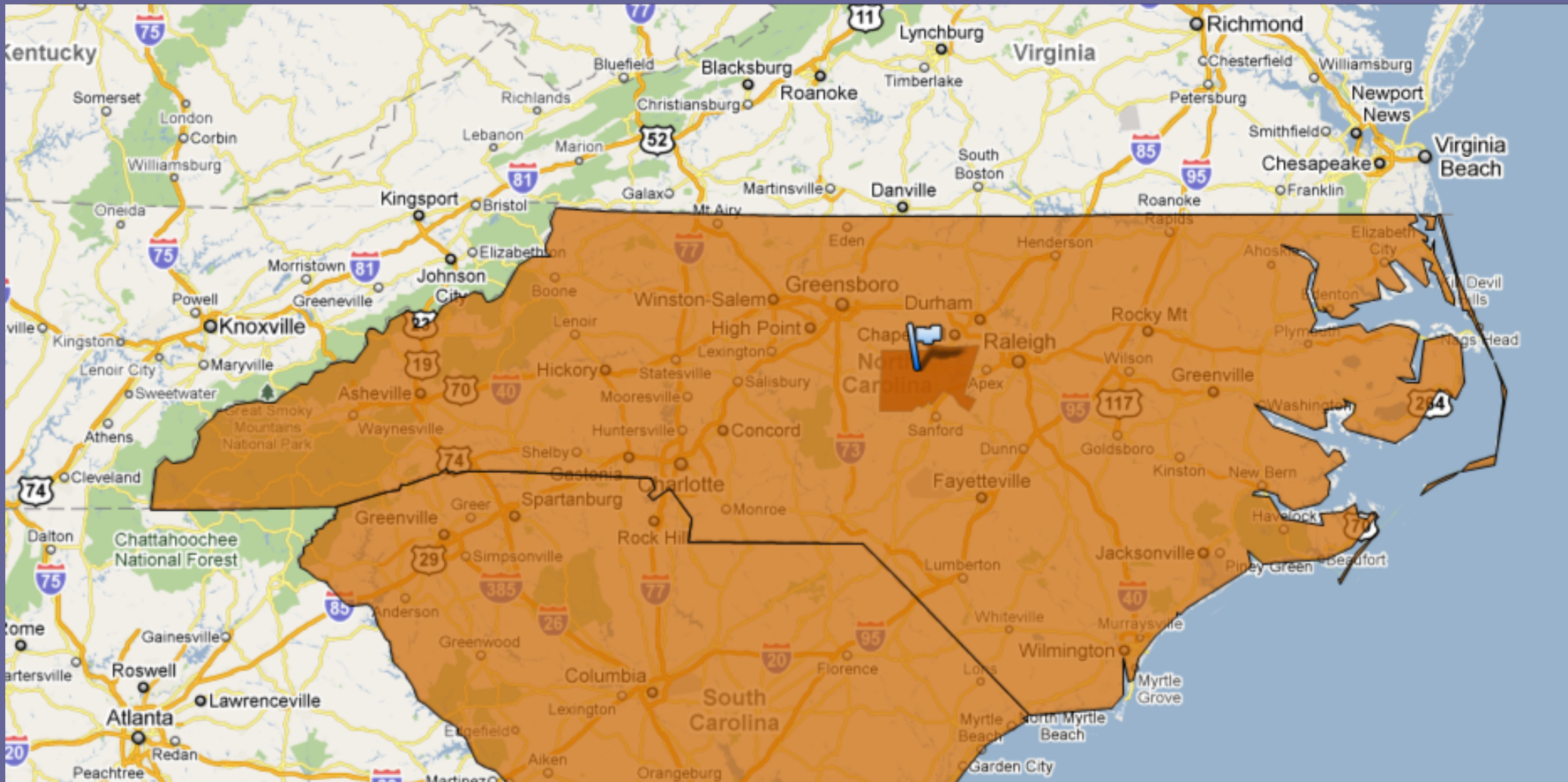
- 24 respondents
- Represented 22 businesses with 38 retail outlets
 - corporate chains
 - independent groceries
 - corner store/country store
 - tiendas

- Research Method

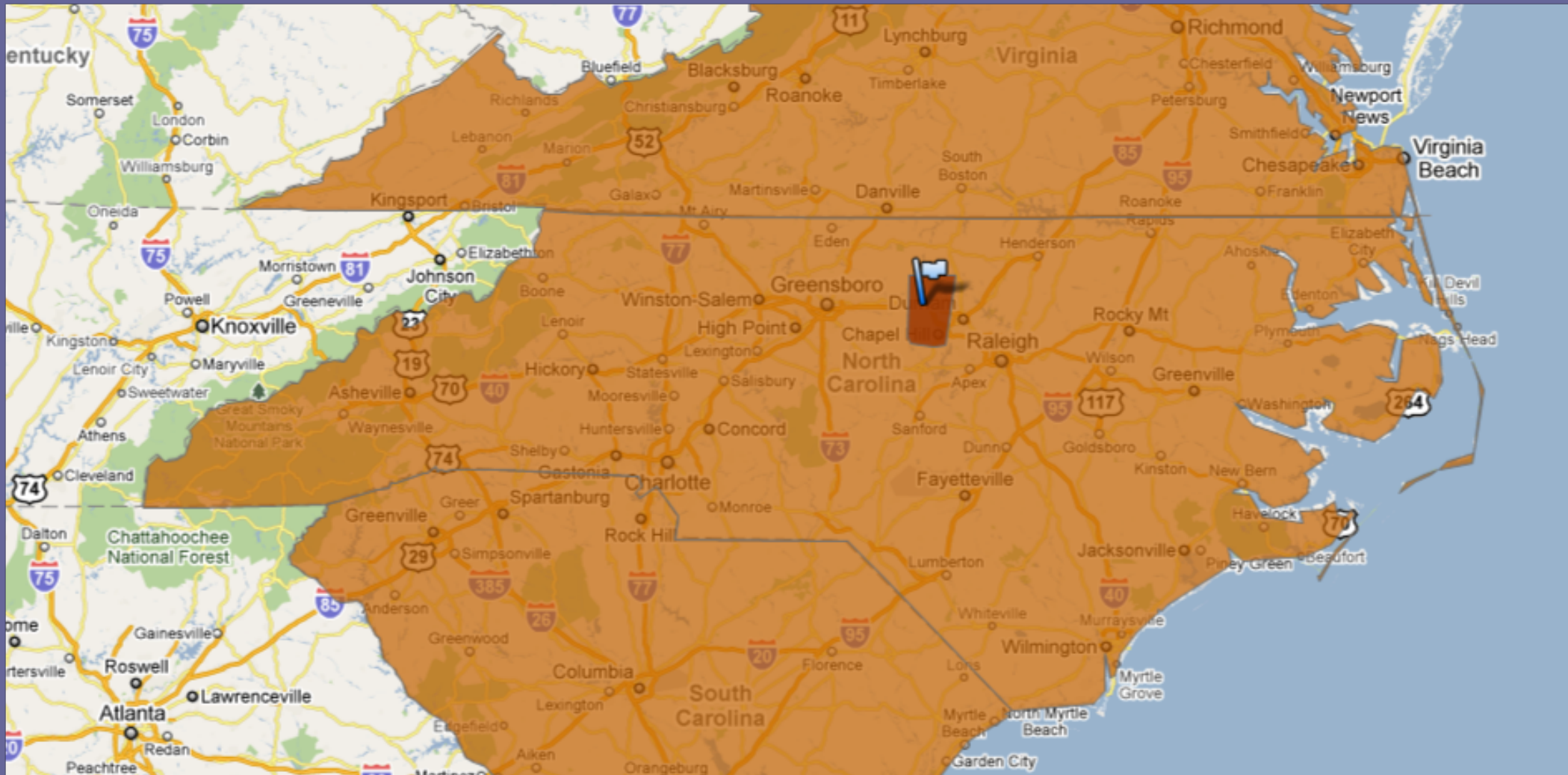
- Interviews lasting between 20 and 40 minutes
- Open-ended questions
- Checklist of marketing practices



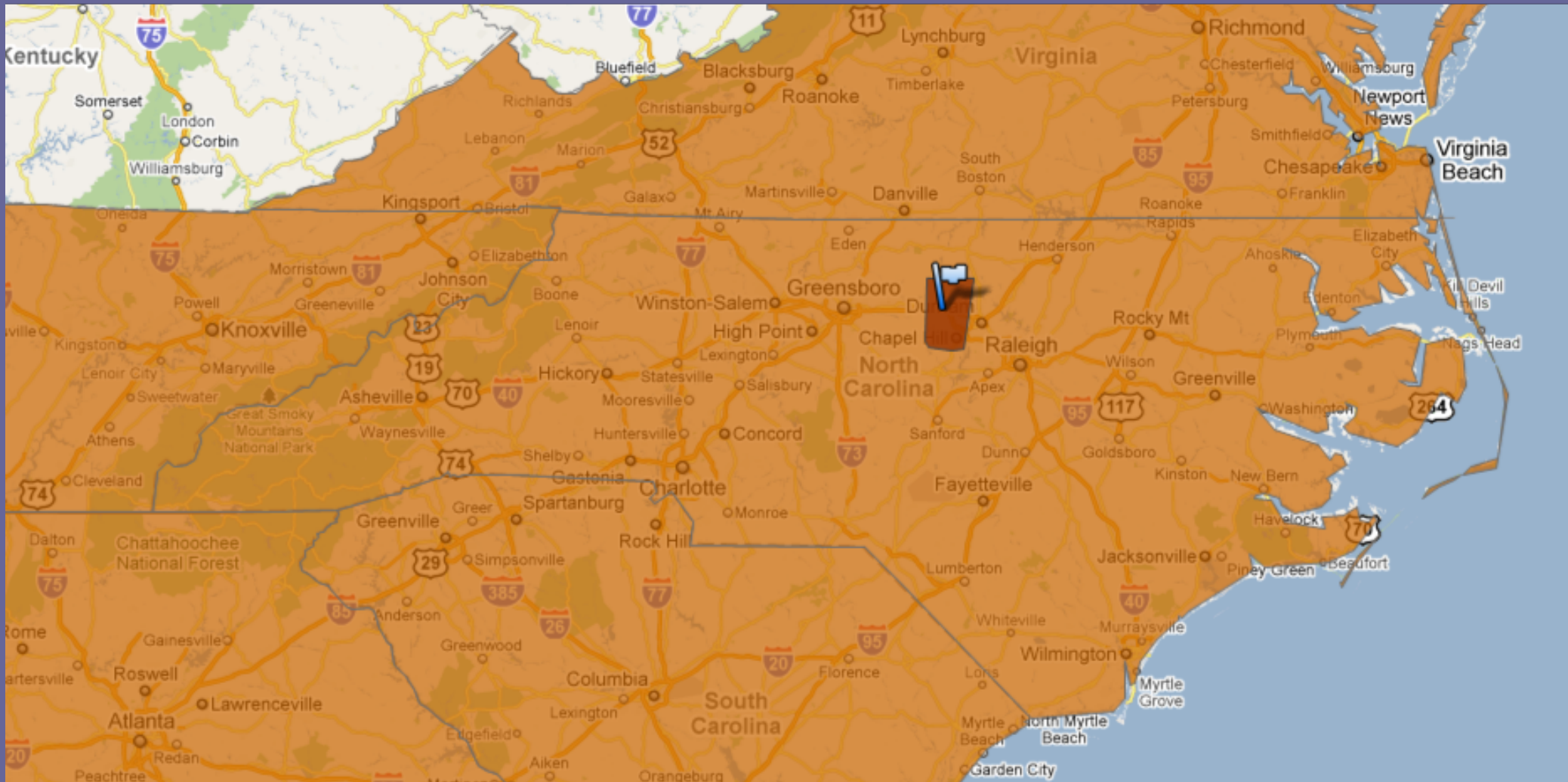
Retailer Definitions of Local: 3, Chain



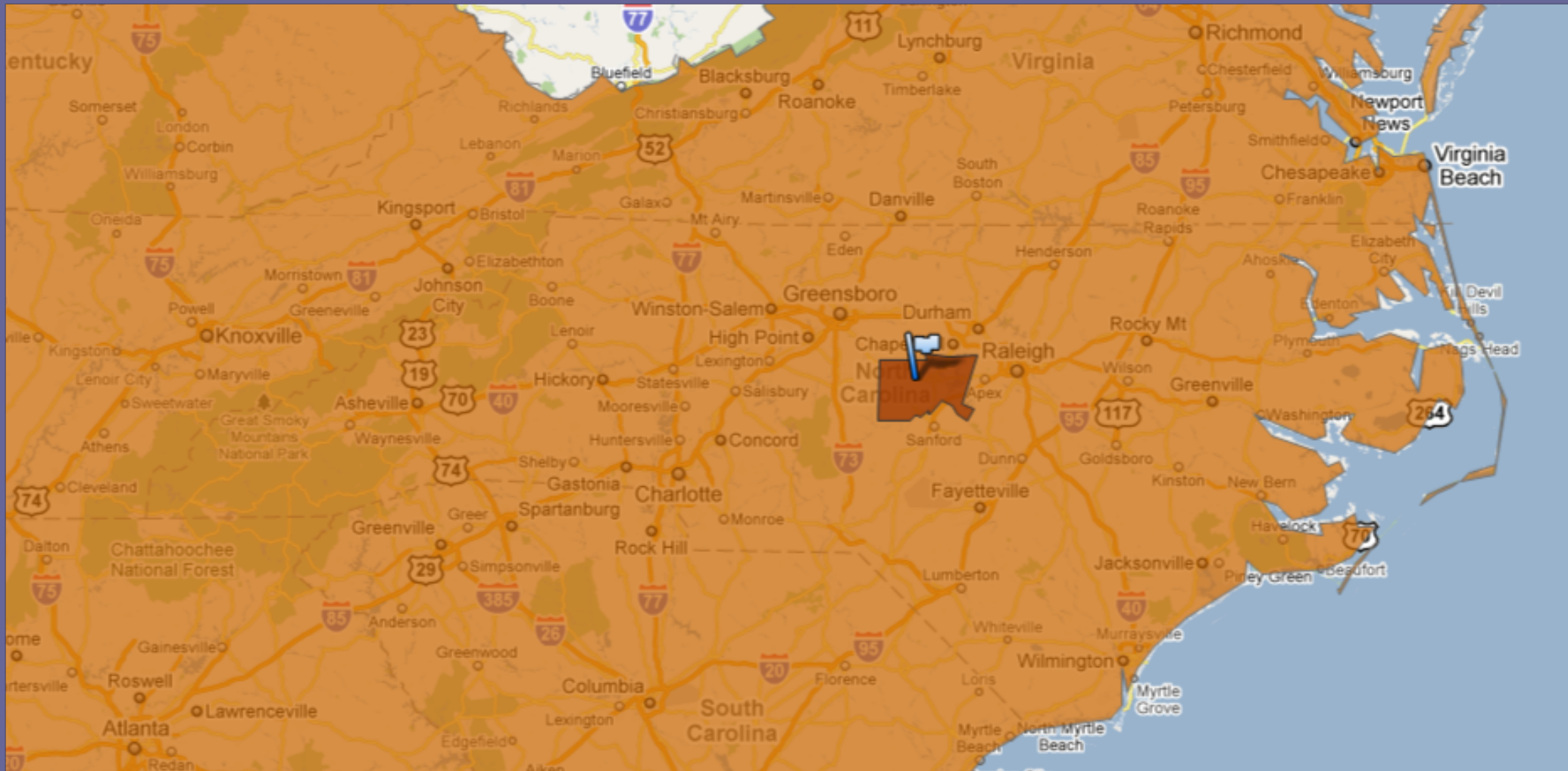
Retailer Definitions of Local: 4, Independent Grocery



Retailer Definitions of Local: 5, Chain



Retailer Definitions of Local: 6, Corner store



Retailer Definitions of Local

- Of 22 businesses, 12 could offer us either a formal or informal definition of local food.
 - *Formal (7):*
 - Published standard OR
 - Definition is used by store to select or market or track goods
 - *Informal (5):*
 - Respondent said they had no real definition OR
 - The definition varied by season and product and did not seem consistently applied OR
 - They tried to define “local” for our sake in the interview
- **Modal Definition: North Carolina + portions of neighboring states**

Consumers have higher hopes for the qualities and impact of local food

	Consumer	Retailer
<i>Distance</i>	County, 30-50 miles, state	State + portions of other states
<i>Quality</i>	Special value-due to seasonality, way it is grown	Standard value-due to stores' regular high standards
<i>Connections</i>	Food that builds ties to neighbors and shapes hometown landscape	Circulate money locally, promote local growers
<i>Type of Production</i>	Small, sustainable	Not specified

Alternative strategies for retailing local food

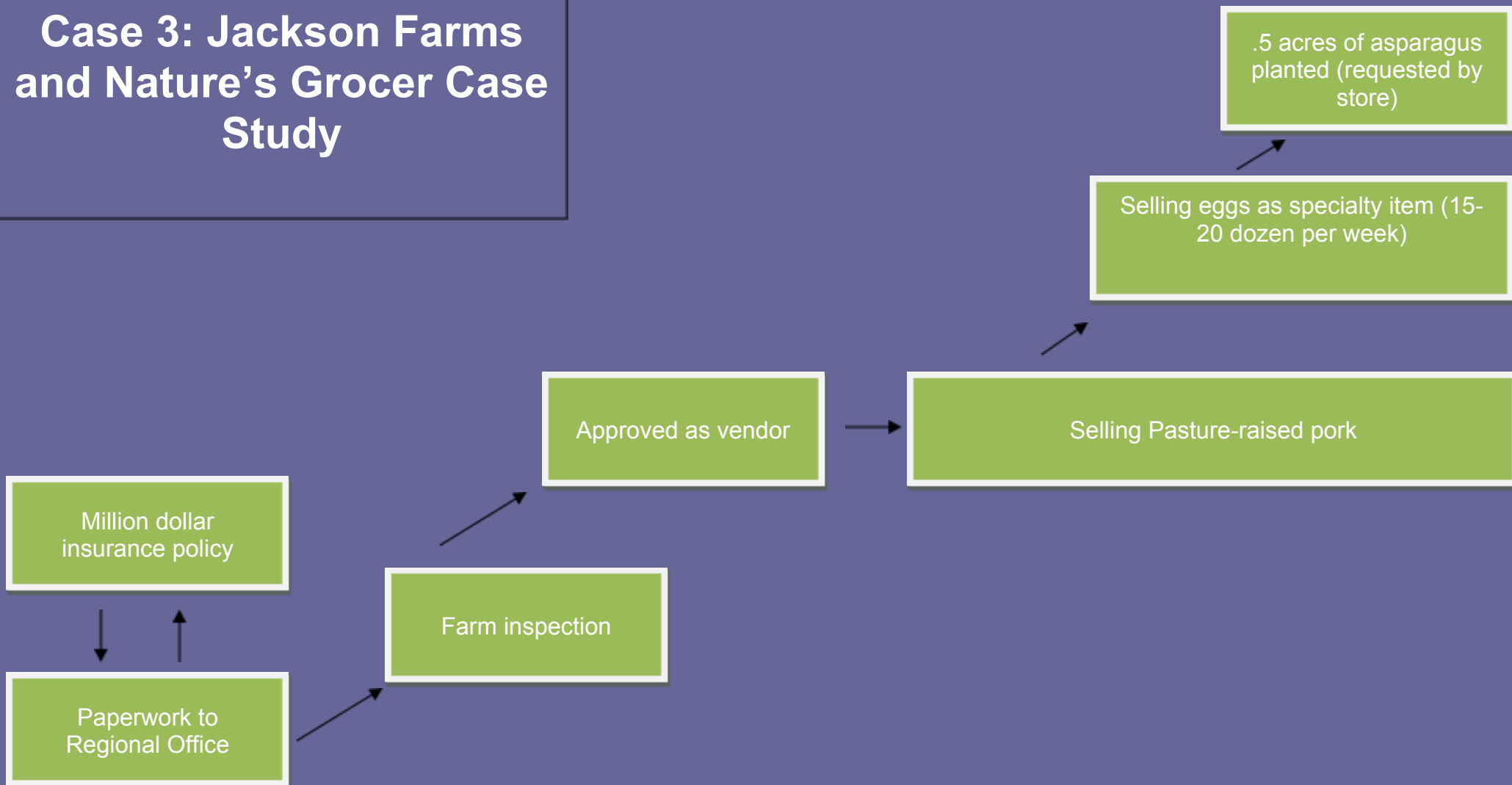
	Build on commonalities in retailer and consumer views	Exploit gap between consumer and mainstream retailer views
<i>Distance</i>	Use distribution facilities of chains to solve small grower transportation issues	Seek out and promote growers within environs of store clientele
<i>Quality</i>		Promote differences of local food, charge more
<i>Connections</i>	Develop marketing materials for local products, promote farms, promote store's commitment to community	Develop community events, message boards, gathering spots, farmers' visibility
<i>Type of Production</i>		Promote common values of grower and store and their commitment to local

Building Partnerships

- “And that's something that I much rather start small with a farmer, and have a successful relationship for both of us and then grow the business rather than either one of us overextend and then have to back away and have it not end well.” (Chain)
- “We have grocery store standards. So if the product is not good enough, if the quality is too poor, if it's packaged in a way that we can't sell it easily, if it's inconsistent, [we can't take it]. I mean we understand seasonality that's different than inconsistency ”

Step-by-Step Partnerships

Case 3: Jackson Farms and Nature's Grocer Case Study



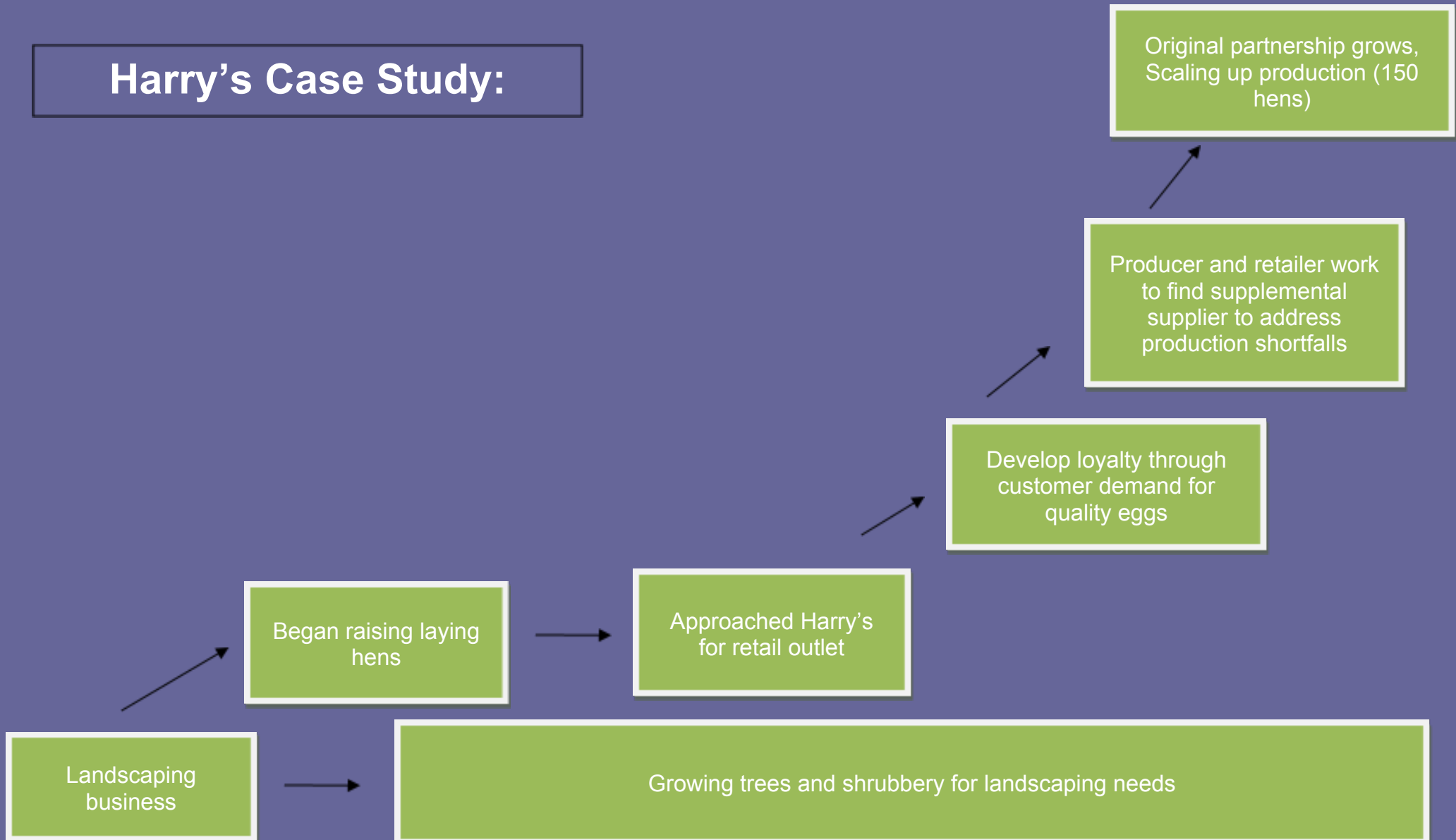
Step-by-Step Partnerships

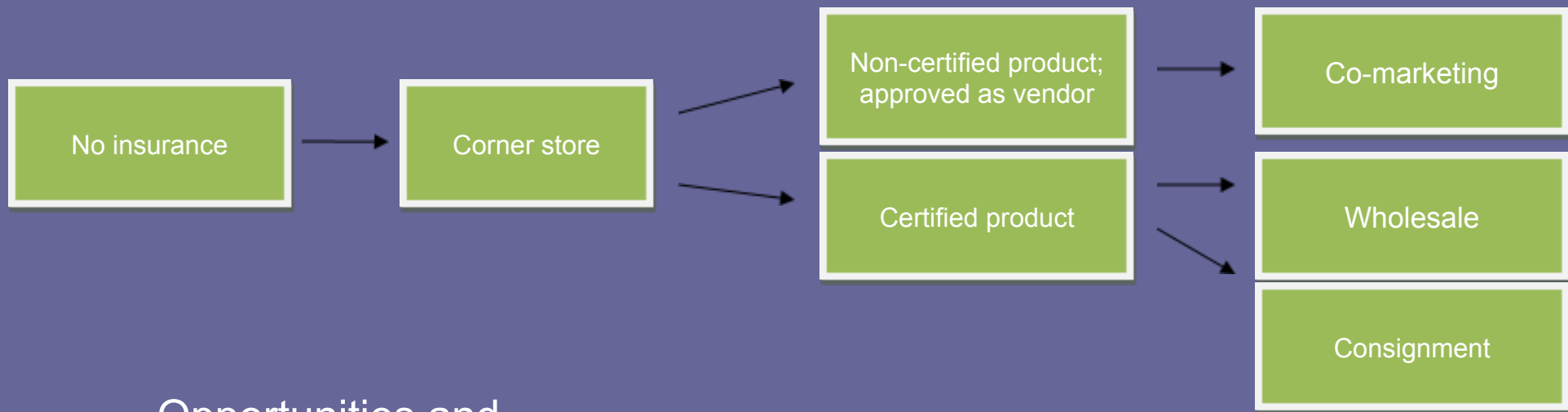
Case 2: Sammy's Case Study:



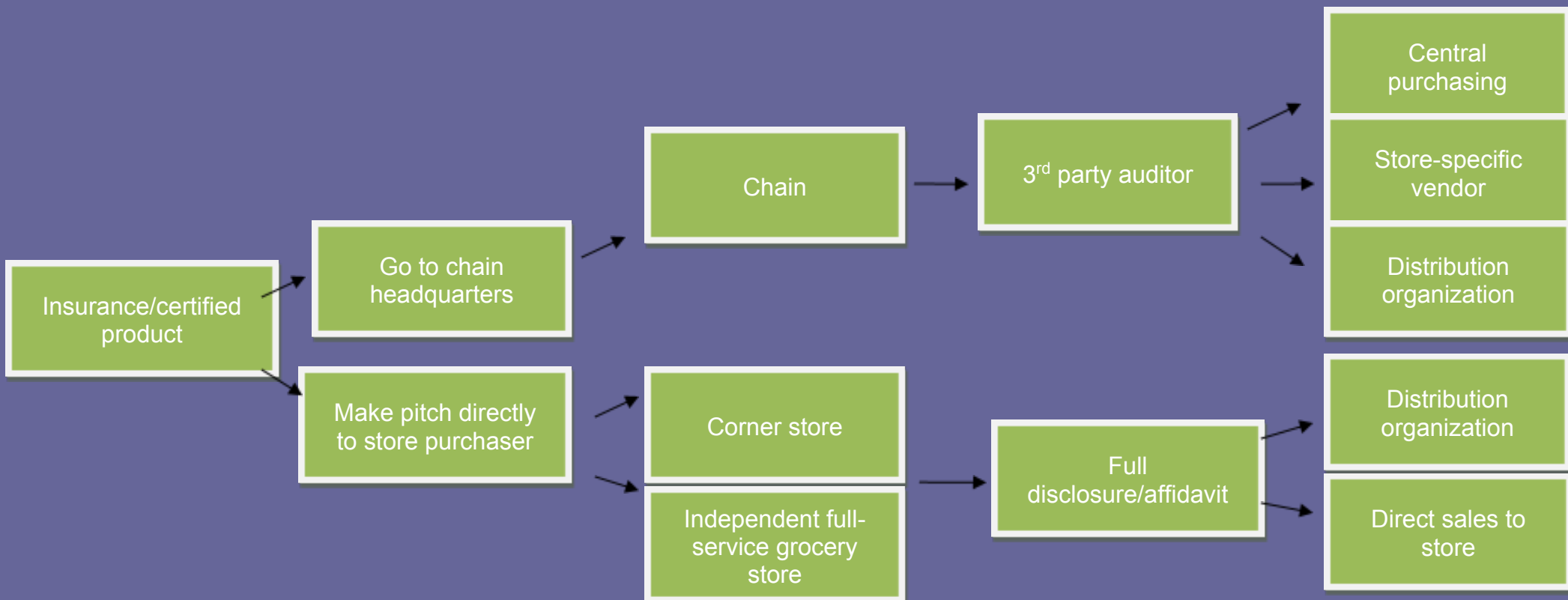
Step-by-Step Partnerships

Harry's Case Study:





Opportunities and conditions for working with retailers



Independent Stores as Entrepreneurial Partners

- “I’m looking for the young people that have a sense of need for creating an economy based off of local farms. Because you’re not going to sell it to Weaver Street. And you’re certainly not going to sell it to Whole Foods. And you’re not going to get into the Carrboro Farmers Market. So where does this leave everybody? No place to go but here.” (Corner Store)
- “The big companies are the problem. Not the little independents. Most of those guys you can just pick up the phone and say, I’m out of this. And their goal is my goal and that is to keep product available to customers. The really cool part of that is that I may run out of meat at 10 o’clock, but by noon I’ll have the cooler full.” (Corner Store)

Final observations

- The more you take care of the term “local,” the more it will take care of you
 - Consumers prepared to see a lot of value in local
 - Collaborate among partners to set and uphold standard
- Opportunities at different scales
 - Find champions hidden in large systems
 - Make entrepreneurial connections within local niche
 - Matching start-up for start-up, generational

Research Team

Graduate Research Assistants

- Erin Kimrey (CCCC)
- Megan Cornog
- Alice Brooke Wilson
- Sabrina Lopez
- Mari Howe

Pilot Interviews and Fieldwork Team

- Ayana Chandler
- Sessaly Craft
- Katie Pollock
- Kathryn Westall
- Seema Shulka
- Travis Lockhart
- Rachel Mossey

Transcribers

- Bill Westermeyer
- Kurt Davies

Consumer Mapping Project

- Alena Steen

Coding and Analysis

- Jonah Leslie
- Amanda Carroll
- Maura Baldiga
- Greg Webb
- Giovanna Alegretti

Research Support

- UNC-Chapel Hill, Office of Economic and Business Development
- Center for Urban and Regional Studies
- Research Laboratories in Archaeology
- Student Undergraduate Research Fellowship

Appendix 1: Retailer Definitions of Local

Formal

1. *Within approximately 250 miles*
2. *Within six-hours by car from store*
3. *Five states region of North Carolina, South Carolina, Tennessee and Georgia*
4. *North Carolina, South Carolina and a bit of southern Virginia*
5. *North Carolina, and southern Virginia*
6. *Two tiered definition: (a) North Carolina (formal, company-defined) (b) the county where the store is located and surrounding counties (informal, store-defined)*
7. *Two tiered definition: (a) twenty-mile radius [produce] and (b) North Carolina*

Informal

1. *North Carolina and approximately within fifty miles from the North Carolina border*
2. *The Carolinas*
3. *North Carolina, southern Virginia and northern South Carolina*
4. *North Carolina*
5. *The South*

Appendix 2: Retailer Tracking and Sales

Estimated dollar volume of purchases from local vendors.

	Est. Total
Retailer 1	\$ 407,000
Retailer 2	\$ 17,500
Retailer 3	\$ 100,000
Retailer 4	
Retailer 5	\$ 2,500,000
Retailer 6	
Retailer 7	\$ 17,500
Retailer 8	\$ 7,500
Retailer 9	
Retailer 1	\$ 100,000
Retailer 11	

Appendix 3: Retailer Tracking and Sales

Estimated number of vendors per category.

	Fruit and Vegetables	Meat and poultry	Liquid milk	cheese	Eggs	Wine and beer	Prepared foods	Other (e.g. soap, supplements)
Retailer 1	30	10	2	8	30	12	20	15
Retailer 2	5	4	2	0	0	0	1	0
Retailer 3	5	1	1	0	0	10	0	0
Retailer 4	3	(respondent could only report on produce)						
Retailer 5	25	6	3	8	4	19	19	9
Retailer 6	15	(respondent could only report on produce)						
Retailer 7	10	6	1	0	3	4	2	1
Retailer 8	4	2	2	2	2	6	2	1
Retailer 9	4	2	1	0	2	0	0	0
Retailer 1	20	(respondent could only report on produce)						
Retailer 1	12	1	1	0	1	5	12	0

Appendix 4: Retailer Promotion of Local Food

Checklist #1: How often do you use the following means to promote local food?						
	Website description of local buying commitments	Website promotion of seasonal local products	Newspaper circular or weekly email promoting specials on local products	Use of social networking sites	Use of text messaging	Total Score for Advertising and Electronic Marketing
Retailer 1	3	2	3	2	1	11
Retailer 2	1	1	3	1	1	7
Retailer 3	2	2	5	1	1	11
Retailer 4	2	2	3	1	1	9
Retailer 5	5	4	3	2	1	15
Retailer 6	5	5	2	2	1	15
Retailer 7	5	5	5	1	1	17
Retailer 8	2	1	1	2	3	9
Retailer 9	1	1	1	1	1	5
Retailer 1	4	4	5	3	1	17
Retailer 1	1	1	1	1	1	5

Retailer Promotion of Local Food

Checklist #1: How often do you use the following means to promote local food?

	In-store special events for a farmer or product	Point of sale signage for local products	Point of sale signage promoting producer	Press releases and Public Relations involving local suppliers	Sponsorship of community food or farm event	Total Score for In-Store, Event, and Farm Marketing
Retailer 1	4	3	2	2	3	14
Retailer 2	2	2	1	2	3	10
Retailer 3	5	5	5	1	1	17
Retailer 4	3	4	4	1	1	13
Retailer 5	3	5	3	3	5	19
Retailer 6	4	5	5	2	3	19
Retailer 7	5	5	5	4	2	21
Retailer 8	5	1	1	1	1	9
Retailer 9	1	2	1	1	1	6
Retailer 10	3	5	3	2	3	16
Retailer 11	1	2	2	1	1	7

Retailer Promotion of Local Food

	Local Champion Score	
Retailer 1	25	
Retailer 2	17	
Retailer 3	28	
Retailer 4	22	
Retailer	34	Independent Groc
Retailer	34	Chain Store
Retailer	38	Corner Store
Retailer 8	18	
Retailer 9	11	
Retailer 10	33	
Retailer 11	12	

Different types of retailers share an interest in local food.