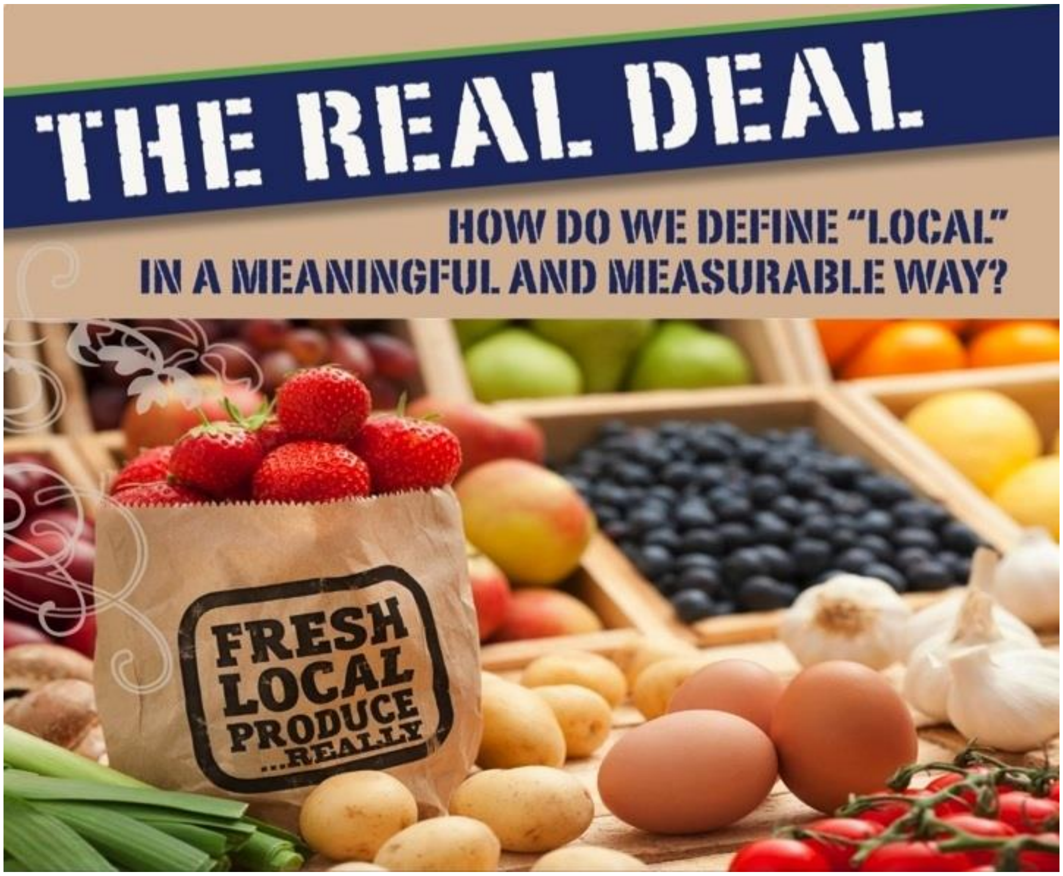

Project Phase 1
Research Report

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Executive Summary

While the term “local food” is commonly used, there are no consistent standards defining it, and this can create real confusion for consumers who want to understand where their food comes from. The term “local” is often used in vague and even erroneous claims, creating some real risks and challenges in the marketplace. To address this issue, and encourage more transparency in the food system, the Pennsylvania Association for Sustainable Agriculture (PASA) is partnering with the Farmers Market Coalition, Food Routes Network LLC, and Crossroads Resource Center in the development of clear definitions and evaluation processes to help farmers markets and food related businesses assess their engagement in the local food system and communicate this information to their customers.

This project, called the “Real Deal,” recognizes the important opportunities for farmers to sell products through farmers markets, community supported agriculture, and directly to restaurants, grocery stores and institutions. These farmers benefit from closer contact with customers and an implicit trust that products from local farms are more authentic, safer, and more sustainable than mainstream alternatives. However, local foods are not always effectively or consistently defined, and this creates challenges in the marketplace and makes it difficult for consumers to access information and verify claims about agricultural and food handling practices. The goal of The Real Deal is to develop tools and resources for farms, farmers markets and food related businesses who want to assess and improve their local sourcing and inform consumers about food origin.

From January to June 2014, the project partners conducted research to better understand the issues and needs of consumers, producers, and retailers related to defining local foods in the marketplace. Using multiple methods including a literature review, focus groups, surveys, and in depth interviews, we investigated the following research questions:

1.) What are current definitions of local foods used by farms, farmers markets, and food-related businesses, and how are these communicated to consumers?
2.) What are the most important values embedded in the concept of “local food” and how these can be measured?
3.) What is the need for and feasibility of a self-assessment tool that measures and helps to communicate a retailer’s engagement within the local food system?

We found that although local purchasing policies are generally defined by geographic proximities and boundaries, this is not necessarily the most important concern for consumers. Consumers are most concerned with the quality, freshness, nutrition, and safety of their food, and while they associate these qualities with local food, these are not characteristics intrinsic to foods produced locally. However, consumers use “local” as a proxy for many other values as well, including community interaction, economic development, social justice, and sustainable growing practices. These values may distinguish local foods from conventional foods in the marketplace and offer a competitive advantage. Messaging developed around the concepts of “Taste, Place, and Face” could capture these values in a compelling way and resonate with locally-minded consumers. It is important to recognize when developed materials and campaigns to reach these consumers that many have already made their purchasing decisions before

they leave their homes. Therefore, customer validation/retention campaigns need to happen parallel to campaigns to reach people who do not seek out local products already.

In western Pennsylvania and on a national level, there is concern among farmers, farmers markets, and food related businesses regarding the nebulous claims of local food in the marketplace. This creates an opportunity to build a program that encourages more transparency and integrity within the food system and helps consumers make purchasing decisions. Currently, it is common for food related businesses and farmers markets to use geographic definitions of local, but our research indicates that this is not the most important value to consumers, and a more effective message might communicate a broader range of values associated with local food. Farmers markets and food related businesses would benefit from resources to evaluate and communicate their local sourcing practices in a more holistic way that speaks directly to consumer values. Our stakeholders report that they are likely to use a self-assessment tool to evaluate their engagement in the local food system. They would prefer a descriptive system (over a tiered or rating based system) that allowed them to communicate the results of such an assessment with consumers through specific examples and graphically represented metrics. Obviously, different types of businesses require different types of communication tools to reach their audiences, but all farmers markets, producers, and retailers indicated social media and websites were the best platforms for them to communicate their self-assessment results. Stakeholders in western Pennsylvania also indicated that incorporating these new tools and resources into the Buy Fresh Buy Local ® chapter would both legitimize the tools and also add more credibility to the Buy Fresh Buy Local program.

Our research indicates that the Real Deal project should provide both a self-assessment tool in addition to uniform marketing materials so that farmers markets and food related businesses can communicate their sourcing policies and the stories of their products clearly. In addition, there is a need for a campaign to encourage consumer awareness of local foods and their impacts.

The next phase of the project will be led by Crossroad Resource Center and involve developing potential models for a self-assessment tool and communication materials, and testing these models among our stakeholders through focus groups and webinar meetings to continue to engage stakeholders in the development process.

Methodology

The Real Deal project team conducted the Research Phase of this project from January through June 2014, and investigated three key research questions:

1.) What are current definitions of local foods used by farms, farmers markets, and food-related businesses, and how are these communicated to consumers?
2.) What are the most important values embedded in the concept of "local food" and how can these be measured?
3.) What is the need for and feasibility of a self-assessment tool that measures and helps to communicate a retailer's engagement within the local food system?

The project team utilized various methodologies to explore these questions, including a literature review, focus groups, surveys, and in-depth interviews, in order to gain an understanding of both consumer and retailer perceptions, practices, and needs.

Because there is substantial research on consumer buying habits to work from, we began with a review of the literature in order to understand the issues surrounding local foods from the consumer perspective. A review of the literature conducted by Megan Philips Goldenberg and Ken Meter of Crossroads Resource Center examines consumers' understandings and motivations for buying local foods, the risks posed by nebulous claims and assumptions about how "local food" is interpreted, and what informs consumer decision-making in a food retail environment. This report also reviews existing programs that define or measure the "localness" of foods and analyzes the range of potential indicators that retailers may use to efficiently speak to identified consumer values embedded in the concept of "local food."

In addition, a scan of farmers market policy was conducted by Stacy Miller of the Farmers Market Coalition in order to understand sample policies, procedures, and standards used by farmers markets to identify sourcing protocols across the nation.

To explore the issues related to local food from the perspective of producers and food related businesses, the research team engaged project stakeholders, specifically members of PASA and Buy Fresh Buy Local partners in western Pennsylvania and throughout the state, in addition to Farmers Market Coalition members across the nation. Using multiple methods, including focus groups, surveys, and interviews, we assessed currently used definition of "local food" by farms, farmers markets, and food related businesses, identified the most important values to these stakeholders associated with the concept of "local food," and explored their opinions on the feasibility of a self-assessment tool that measures and helps communicate retailers' engagement in the local food system.

In February 2014, we publicly launched the Real Deal project at PASA's annual *Farming for the Future Conference* in State College, Pennsylvania by conducting a brief mini-survey and hosting a focus group discussion. The focus group was attended by seventy participants, and forty mini-surveys were returned. An additional focus group was conducted in March at a meeting of Pittsburgh Food Policy Council members. Notes from the focus groups were analyzed, and values identified through this process were then built upon and vetted through the survey process which followed.

Based on the results of the focus group discussions and mini-survey, the research team developed an online long-form survey and distributed this to PASA members, specifically targeting PASA Western Region members and Buy Fresh Buy Local partners, as well as Farmers Market Coalition members around the country. A total of 258 individuals responded to this survey. Following the survey, 10 follow up interviews were conducted of Western Pennsylvania Buy Fresh Buy Local Partners and farmers market leaders in the region.

Based on insights derived from the combination of the literature reviews, focus groups, surveys, and interviews, the project team has developed a set of recommendations for possible values and indicators that could better communicate a retailer's engagement in the local food system, as well as identified tools and resources that would be most useful for retailers to communicate this engagement to their customers.

Literature Review

Introduction

Consumers and food leaders are increasingly wondering if the term “local food” has lost its meaning, as food purveyors rush to take advantage of emergent interest. Like the term “green” before it, the term “local” has been adopted by some marketing firms to sell products that don’t necessarily have that quality, or at least have an ambiguous connection to the term.

Perhaps the clearest example of this “local-washing” is Frito-Lay’s attempt to market its potato chips as local. This led one Iowa writer to declare high-fructose corn syrup a local product (Friese, 2009). Although this statement was laden with sarcasm, it wasn’t incorrect. The lack of a strict and strong definition for local foods allows anyone to attempt to sell any product as local. In addition to products being local or just “local-washed,” there are “farm-to-table” restaurants and grocers that certainly can’t source everything locally, even if sourcing a fair bit in the spirit of the concept—but how much is enough to qualify as local? If a restaurant buys pickles from a nearby cannery but the cucumbers are a mixed lot from various regions, does that count as a local product or not? If Wal-Mart considers “local” food to be anything that can be shipped in less than 24 hours by truck, does this make Mexican produce “local” to Southwest Indiana(Meter, 2013)?

The solution is not a strict definition of local. The USDA’s definition of 400 miles or within the state of production has been met with much resistance. The New Oxford American Dictionary’s definition of locavore as a person who consumes a diet of food grown within a 100-mile radius is more widely accepted, receiving popular attention in the *100-Mile Diet* and Barbara Kingsolver’s book *Animal, Vegetable, Miracle*, to name a few. In some communities, however, “local” might mean “within my valley, or “within my county.” Many local food leaders in more densely settled areas consider “local” to be within a 30-minute drive, or within a 50-mile radius. Gary Nabhan used a 220-mile radius in his book, *Coming Home to Eat*, to highlight that in a sparsely populated desert area, widely scattered local options might range from cactus, to rangeland livestock, to Mexican seafood.

Interviews with self-proclaimed locavores, however, reveal that food purchasing decisions do not always focus primarily on the distances their food travels. Some analysts have pointed out that what is called the “local” food movement is more centrally defined by a desire among farmers and consumers to connect more closely and build affinity with each other (Meter, 2003, p. 8).This may, indeed, be the feature most difficult for larger operators to co-opt. Economists remind us that building lasting relationships of trust is essential to creating both value, loyalty, and competitive advantage(Meter, 2009).Without direct negotiations between farmers and eaters, the food system itself cannot attain a condition of balance(Meter, 2011).Indeed, presenting the *illusion* of this connection is often central to “local-washing” efforts(Hartman Group, 2005).

A preference for “local” food is often overlaid with several deeply held values, and “local” is only the catch phrase used to capture these values (Born & Purcell, 2006). Not all of these values can be expressed in the selection of any one “local” product. For example, a given consumer who seeks to buy a locally raised chicken may choose not to purchase from a nearby farm if they are persuaded that management or labor practices are more sustainable on a farm 200 miles down the road.

Prudent food marketers aim to clearly communicate which of the product attributes customers are seeking that they can actually provide. While Frito-Lay's "local" claims are largely based on the fact that they purchase many of their potatoes from farms close to their processing facilities (arguably motivated more by efficiency than an intrinsic concern for broader local development that would benefit many stakeholders), "local" is largely in the eye of the consumer, contingent on individual values. Moreover, there are definitions that transcend the choice of an individual consumer, such as when a local food network declares a certain region to be their desired "foodshed." Therefore, it is important to understand the intricate value structures associated with local purchases.

Consumer Preferences and Demand for Local

"Local" is decidedly a consumer driven, niche market differentiated primarily by the place-based aspects of a good (Phillips & Thilmany-McFadden, 2010). Given this, a marketer or producer must be prepared to identify the target market segment, determine its needs, and inform the consumer of specific product traits. Since niche consumers are often times willing to pay more to have their values addressed, a producer or provider can typically capture a higher margin, but only when product qualities are appropriately matched to the needs and preferences of the consumer (Thilmany, Bond, & Bond, 2008).

Although locavore and local-purchasing policies are largely defined by geographic proximities and boundaries, this is rarely the most important concern for consumers. Instead, as mentioned above, consumers use "local" as a proxy for many other values (Born & Purcell, 2006). One marketing-strategy report refers to local labels and others like it (organic, natural, whole, sustainable) as just avenues for identifying products that offer a genuine, high-quality experience. It points out that what these labels actually stand for is not necessarily what the consumer is literally interested in (Hunt, 2007). Similarly, another industry analysis report suggests that "local" is just the value proposition that companies use when discussing responsible sourcing (DaSilva, 2014). The Hartman Group points out that many branding efforts are more about "the story" than about the facts (Hartman Group, 2005), and this creates space for food stories that feel good, but don't embody a precise sense of local— grocery stores may provide photo displays of generic, earnest farmers in lush farm fields, even while sourcing food from thousands of miles away.

Although "local" is the proxy many use to represent more specific values and issues, those exact issues are not always understood. A broad food industry survey of consumers reports that most consumers (74% of survey respondents) want more information about the greater implications of their food purchasing decisions, yet only 54% trust a company to provide that information. A provided example demonstrates the knowledge gap between consumer priorities and consumer knowledge. This same survey found that most people (83%) consider GMO labeling to be important, even though respondents self-report that they don't understand what GMOs are, or are confused about the implications (55%) (DaSilva, 2014). Other survey-based work concluded that consumers purchasing local products do so out of a wealth of concerns: for farmland preservation, maintaining a sense of place, a desire to lower the potential environmental impacts of the conventional system's "food miles," increasing farm viability, contributing to the local economy, access to information (product transparency), freshness and quality, and social interaction(Burros, 2008; Howard & Allen, 2010; Kezis, Gwebu, Peavey, & Cheng, 1998;Manalo, Sciabarrasi, &McWilliam, 2003; Thilmany, Bond, & Bond, 2008). Additionally, just as consumers may feel more comfortable patronizing businesses owned by people with similar cultural and language backgrounds, some may prefer to purchase foods from African-American, Latino, or Native American producers, or from a woman-owned farm.

A basic industry trends report examined various motives for purchasing local, and yielded the following survey results (DaSilva, 2014):

- 64% of surveyed consumers state a desire to support local businesses
- 39% believes the taste and quality of a local product is better
- 31% has more trust in the standards for locally produced foods than those of other regions or countries
- 28% believes that local products are healthier
- 26% thinks it's better for the environment when food doesn't travel as far

So what do consumers want? The following subsections attempt to disentangle the various issues and values that get co-mingled in consumer purchasing in general, and specifically in regards to local purchasing.

Quality, Freshness, Nutrition, Food Safety

Above all, consumers are concerned about quality, freshness, nutrition, and food safety. A food trends survey shows 97% of consumers are primarily concerned with family satisfaction, 93% of survey respondents are concerned about nutritional quality and 92% are concerned about food safety, followed by 77% being concerned about sustainability. When forced to choose just one concern, family satisfaction (54%) and nutritional quality (41%) split the vote, with sustainability receiving only 5% (DaSilva, 2014). An interesting survey comparing producer and consumer perspectives found that *consumers* were far more likely to describe local food with words such as a "taste," "taste" and "quality" than *producers*, who defaulted to "miles traveled" or other geographic descriptors (Selfa & Qazi, 2005).

Although these desires for higher quality, fresher, most nutritious, and safer are primary motivators for individuals shopping for local foods, these traits are not inherent to local food. While it is mostly true that food sold at the farmers market was harvested within a day or two of that market, local food sold at the grocery store could be just as old as other available items, and indeed some non-local products may be fresher. However, days and/or miles between harvest and consumption are not the other determiners of freshness. Handling and storage is potentially more important. Fruits and vegetables that are stored at the proper temperature and humidity across the supply chain may retain more freshness and nutrition value than a product that is harvested during the heat of the day, improperly stored and sold the next day. Nutrition and freshness are correlated, but proximity to origin (or "localness") and nutrition are not correlated (although there is some evidence that correlates soil quality and nutritional content). Similarly, localized food systems are not safer than large, global food systems, they just have a smaller impact (i.e. fewer people get sick because fewer people are exposed) and tend to have fewer transfers of ownership and less co-mingling, making traceability simpler. However, locally produced foods still come with a risk of microbial or chemical contamination.

Geographic Proximity

The inherit difficulty with defining geographic proximity is that while "place" is stationary from the viewpoint of the producer harvesting a given product, "place" is dynamic from the viewpoint of the consumer. As Eriksen (2013) summarizes from Mount (2012), "local food tends to be perceived by each actor based on his or her unique priorities, anxieties, capacities, goals, and values. "Geographic proximity can be defined and measured many different ways, depending again on the priorities and values of the lens-holder. While a distance radius is often the simplest and most used metric for defining geographic proximity of production to consumption, municipal or government boundaries make more sense from an economic development perspective. Similarly, a "foodshed" concept is more closely linked to consumer environmental concerns while access to highways, transportation barriers, and time spent on the road are more likely to influence a producer's definition of geographic proximity.

A second term, "food miles, "measures the actual distance food travels from production to point of purchase. This concept differs from a distance radius between production and consumption since some products are known to travel great distances for processing and packing before returning back to the region of production. This is particularly true in regions with major geographic barriers such as Colorado (with the Rocky Mountains) and Michigan (with the Great Lakes). In these cases, a food miles metric would reveal the actual fossil fuel usage, important to consumers interested in the reduction of their carbon footprint.

A consumer with these primary values is also likely to identify with a so-called "foodshed" once they are exposed to the term. The "foodshed" concept is largely based on the "watershed" concept, which ties various micro regions together with common natural linkages such as climate, drainage, and soil types (Feagan, 2007; Freedgood, et al, 2011, p. 3). Given this construct, a consumer might choose products grown in a given "foodshed" in order to support various production practices and environmental impacts in a natural region.

Foodsheds, based on more natural boundaries, are also inherently complex. Shoppers at the co-op grocery in Tucson, for example, can purchase vegetables that were harvested just a few miles away, but then shipped to California for processing and back before arriving at the store (Meter, 2012a). Alaskans reported that most of the "local seafood" available for purchase (as opposed to gathered for oneself or traded within community circles) has been shipped to Seattle and then back to Alaska, since this is more efficient for prevailing supply chains (Meter & Goldenberg, 2014b). Still, if the consumer is mostly concerned about supporting local agriculture, employing neighbors, or other public goods associated with the immediate vicinity, the actual distance traveled by the product may only be a minor concern.

Interestingly, a survey conducted in Maine found that the larger an area a consumer considered "local," the less they were concerned with the community, or social aspect of a farmers market. In that same survey, state boundaries were considered the largest acceptable local region (Hunt, 2007). In some surveys and focus groups, 50 miles is often the most frequently given definition of local (Howard & Allen, 2010), whereas a state boundary is also very common (Moschetti & Phillips, 2012; Moschetti & Phillips, 2013), and is congruent with USDA definitions. Still others, such as Gary Nabhan (2009), argue for a place-based definition. For example, Nabhan prescribes to a 220-mile based diet due to the constraints of living in the deserts of Arizona. He also sought to include the northern Sonora desert in his view of "local" to encourage cross-border communications, and out of respect for traditional Native foodways that flourished before the border existed.

One survey found that producers are far more likely to define local in terms of travel distances, whereas consumers will define local in terms of municipal boundaries (e.g. city, county, or state). Additionally, while urban consumers were more likely to define local in terms of community interaction, rural residents were more likely to use distance qualifiers (Selfa & Qazi, 2005).

In a recent investment plan for local agriculture announced by the state of South Carolina, it was determined that giving consumers reliable information about the farm on which their produce was grown was critical for retaining the integrity of a "local" food label — since farmers and customers both recognized that even produce traded under a geographic label was unlikely to have actually been sourced within the state (Meter & Goldenberg, 2013).

Regardless, many consumer surveys find that when consumers are asked to rank food product attributes such as nutrition, quality, economic development, product practices, etc., food miles is often considered a lower priority, if not the lowest (DaSilva, 2014;; Howard & Allen, 2010; Selfa & Qazi, 2005).

Production Practices

Although local food does not directly correlate to any one set of production practices, consumers often consider local products more natural or humanely raised, especially when they are from a smaller farm. One study found that 20% of survey respondents thought local produce carried less pesticide residue; 22% thought local produce was non-GMO; and 23% perceived local produce as also organic (Campbell, Khachatryan, Behe, Dennis, & Hall, 2014). Despite such assumptions, studies reveal that "local" and "organic" are not jointly demanded. Some consumers will chose an imported organic product over a local conventional product, and vice versa. Willingness-to-pay studies find that consumers will pay more for a local product than an organic product (Thilmany, Bond, & Bond, 2008) and are more likely to purchase local products over organic products (Campbell, Khachatryan, Behe, Dennis, & Hall, 2014).Strict locavores and a strict organic consumers may share similar primary and secondary values and motivations, but prioritize such values differently.

Economic Development

If economic development is of primary concern to a consumer, then geographic proximity is best defined by municipal boundaries, which correlate to tax and policy districts. In areas where food or agricultural sales are tax-exempt, a municipal boundary is less important since sales tax revenues are not being generated for any particular area. In this case, a distance radius is more likely to capture the intention of an economic-development minded consumer, given the assumption that purchasing a given local product contributes to local job development, etc. by helping dollars circulate locally. As one regional development economist put it, "Global food systems are more efficient, and the marginal benefits of my food dollars are greater to someone in Mexico, but when I spend my money locally, my neighbor stays in business and his daughter gets to go to soccer camp" (Shields, 2009).

Although local food purchasing has the potential to create real economic impacts, the extent of these impacts is limited; the full potential of local purchasing is better realized when intermediate inputs are also available locally. That is to say, local dollars stay local not just when a consumer purchases food products from local farmers, but also when that farmer purchases seed and other supplies from a local dealer, or when a locally owned restaurant purchases food from a local farmer that purchases seed from a local supplier. Additional positive impacts are realized when local residents are employed and if these employees shop in a locally minded manner. These multiple rounds of spending are nearly impossible to track in an efficient and effective manner in an emergent situation, or when production and processing infrastructure is not localized, further inhibiting precision and accuracy in economic impacts of local food system studies (Meter & Goldenberg, 2014a). Our work also suggests that the strength of social and commercial networks, or the presence of formal business clusters, may be critical measures of local impact — even though the consumer may not be attuned to these concepts at the point of purchase. Indeed, money spent in an economy with a vibrant and robust local food system with intermediate input suppliers will have a greater impact than money spent in an economy without supplier or processing infrastructure.

The average consumer's perspective of economic development issues is difficult to analyze. In consumer preference surveys, "support for local farms and businesses" tends to run from the middle of the pack in importance in some studies (Kuches, Toensmeyer, German, & Bacon, 1999; Selfa & Qazi, 2005 ;) to the upper end of importance in others (DaSilva, 2014; Thilmany, Bond, & Bond, 2008). Economic development, specifically, is just as likely as not to appear on a consumer preference survey. **It also seems likely that consumers operate more from an awareness of "community economic development," which encompasses a broader range of concerns, from social connections to environmental issues, than do academics and professionals limiting their attention to formal "economic development" (Meter, 2008).This indicates that perhaps a food system's economic development value is something mostly prioritized by politicians and economic development entities, whereas consumers are concerned with "helping" or "supporting" their neighbors. Alternatively, consumers may assume economic development as an auxiliary outcome of shopping locally, and feel no need to call it out specifically.**

Social Justice

Social justice qualifiers are less likely to show up in a consumer motivations survey. It is also difficult to separate these values from other qualifiers associated with local foods. A willingness-to-pay study, in which participants are asked to choose between purchasing various products at various prices or not purchasing anything at all, evaluated the effects of interacting labels and found that a fairtrade label will counteract the negative effects of an import label, but contributes little to willingness-to-pay for domestic or local products. It is hypothesized that consumers assume that products purchased locally originate from more just systems due to U.S. laws and regulations and that consumers have a greater desire to support small farmers and their co-operatives (as historically signified by the fair trade label) than a farmer engaged in the more conventional system(Onozaka & Thilmany McFadden, 2011). However, any consumer assumption that local and domestic food systems are inherently more just is not necessarily based in evidence (Born & Purcell, 2006). Some consumers nevertheless purchase organic certified produce under the assumption that workers are paid more and experience better working conditions (Murphy, 2008). **Some speculate that social justice issues will continue to garner new attention, eventually making "social justice" the new "local" or new "organic" (Gould, 2008).**

Community Interaction, Sense of Place

This intangible value, "a sense of place", is not well represented in consumer preference surveys, willingness-to-pay studies, or staged auctions. It is also a value that cannot be captured by a label. A dissection of consumer values regarding local foods separated values into three, equal categories—geographic proximity, relational (social, communal) proximity, and values proximity. This suggests that at least in the eyes of some, direct interaction between producer and consumer is just as important as geographic distinctions and public good factors (Eriksen, 2013; Meter, 2003, 2011).A regression analysis of consumer traits, market atmosphere, and consumer spending found that consumer interaction with the farmer was a greater predictor of spending than product attributes (freshness, quality) or household income (Hunt, 2007). This is supported by a general belief among farmers that they make more money at market when they go themselves instead of sending staff. This perception, could, however, just as easily be a function of the farmer being a better salesperson than an accurate representation of the magnitude of consumers' desires to purchase directly from the farmer.

Community interaction is the essential and defining element of local food, and indeed to building consumer loyalty to a farm, a label, or a brand —one at risk of getting lost when direct-to-consumer agriculture scales up and moves into more conventional supply chains. The greatest indicator of the magnitude of consumers' preference for community interaction may be the widespread growth of farmers markets and CSAs. This is supported by many studies which find that where a consumer chooses to shop is a good predictor of what they'll purchase or the premium they assign to locally sourced foods (Thilmany, Bond, & Bond, 2008; Thompson & Kidwell, 1998). For example, someone who purchases items at a farmers market is expressing a greater interest in community interaction than someone who shops at a grocery store that sells local food. **Both consumers may purchase an identical item at either location, but the initial choice to go to a farmers market or grocery store is an expression of desire to participate in the social aspects of the local food system, or not. The community interaction aspect of local food is diluted or lost entirely when major grocery stores sell local products without carrying the identity and farm brand to the market shelves.**

Not All Locavores Are Created Equal

A theoretical framework posited by Thilmany, Bond, and Bond (2008) and tested with survey data and cluster analysis examined a variety of consumer preferences in regards to willingness-to-pay for local produce, including public goods attributes (for example, the belief that purchasing local products increases social equity) and intrinsic product qualities (for example, freshness), as well as demographic information. Their analysis identified four distinct consumer groups, though none of them were considered purely locavores (concerned primarily with geographic proximity). Instead, these consumer groups were defined by different values, such as (1)production practices, quality, and safety (pesticide free, hormone free, organic); (2)price and financial value; (3)personal values (support agriculture, land use, environmental benefit); and (4) general quality value (see Figure 1). Overall, demographics were a weak predictor of purchasing preferences, as were perceptions of food-miles or a "locally-grown" label.

Similar analysis of farmers market consumers found three distinct and statistically significant consumer groups similar to the ones listed above, with the largest number of survey participants being mostly concerned about factors external to food production (community interaction, for example) akin to group 3 listed above. The second largest group was concerned about production practices and intrinsic traits (group 1 above), while the third group was focused on quality of product, but not production practices or external factors (group 4 above). When survey participants were asked to list three words to describe their reasons for shopping at the farmers market, 57% of the words regarded intrinsic qualities of the food (freshness, organic) while 43% regarded social interaction or market atmosphere. Although this study found that household income had a significant impact on expenditures at the market, the perception that farmers markets are social environments or are a family activity was a larger predictor of expenditures than household income alone(Hunt, 2007).

Other studies suggest that there are only two distinct groups of local consumers. One group is primarily interested in product attributes as intrinsic qualities of the food itself (e.g. freshness, nutrition, safety). The second group, however, is primarily interested in the public good, or extrinsic qualities of the food products (e.g. economic development, social justice, farm viability, community interaction) (Gumirakiza, Curtis, & Bosworth, 2014; Howard & Allen, 2010). Although this delineation is clear on the surface, production practices add an additional layer, affecting both intrinsic and extrinsic qualities of a food product of interest. Figure 1 provides an illustration demonstrating how any given product many satisfy one, two, or all three of these general consumer preferences, but as the illustration suggests, the number of products meeting all three sets of preferences simultaneously may be limited.

Figure 1: Consumer Values Represented By Local Purchasing Behavior. Numbers coordinate with consumer clusters outlined above as defined by Thilmany, Bond, and Bond (2008).

These analyses suggest that while many values get tangled up in the pursuit of local products, not every consumer is seeking to express the same set of values. Instead of a prescriptive label with a hard-line definition of local, a series of labels that describes a product or business would best help consumers act on their various priorities. Hinrichs and Allen support this notion, suggesting that a single-focused, "buy local" campaign runs the risk of being superficial and easily muddied, whereas a multi-dimension, values based consumer campaign held in concert with other labeling efforts will be more effective in reshaping the food and agricultural system. They further suggest that "local" be demoted as a choice descriptor if real system change is to occur (2008).

The Value of Credible Labeling, or Not

Movements to create social change may falter, stumbling into just another product category without credible labeling and verifiable standards. "Local" in particular, lends itself well to

manipulation— *every*thing is locally produced *some*where. If consumers cannot make an informed choice due to mislabeling, market-driven conservation efforts falter (Cooper, 2012). Further complicating matters, most food purchasing decisions are made based on the consumer's *indirect* experience of the presence of these values in the food itself. One does not really know how fresh a head of lettuce is; one has a perception that it appears fresh enough to purchase. In some cases, a label may be the only guidepost the consumer has to make purchasing decisions.

To this end, several consumer motivation studies have found that diminished "perceived consumer effectiveness" (PCE) is an inhibitor to activist purchasing. That is to say, a consumer is less likely to choose a local product if she believes that her purchase will do little to further her goals. Diminished consumer loyalty is also likely if the potential purchaser feels the product is either mislabeled or if the labeler is not trusted. Put more simply, if a consumer suspects a product or store of "greenwashing," or doubts the validity of product claims, she's less likely to seek out "green" products. Variability in purchasing habits among environmentally oriented consumers is attributed not to differences in personal concern for the environment, but instead to differences in PCE, or a lack of faith in product claims (Roberts, 1996; Teisl, Noblet, & Rubin, 2007). A concern for the environment may be a deeply held value amongst a group of consumers, but only the ones believing that their activist purchasing makes a difference will make choices based on those values. A label, brand, or reporting template, similarly, will only be useful to a consumer if the purchaser trusts the source.

Although it is well known that lack of credibility alienates consumers, that doesn't stop some companies from jumping on the bandwagon, whether they are invited or not. One marketing advice paper recommends that savvy marketing strategies not get bogged down in taking "natural" literally, but instead focus on storytelling and life experiences as part of the natural identity (Hartman, 2013). While this makes perfect sense from a marketer's standpoint, with an incentive structure for businesses to *appear* to be niche producers, it separates niche consumers from their intended goals, and penalizes the whole segment going forward. Such a phenomenon is likely underway right now as local food systems try to "go to scale" with food hubs. Wal-Mart recently donated $3 million to support the development of food hubs, but the Appalachian Sustainable Agriculture Project declared this contribution as just a way for Wal-Mart to reduce local food to mere geography, while capturing consumers' willingness-to-pay for (but without delivering on), social justice, economic development, environmental sustainability, or food access outcomes (Jackson & Perrett, 2014).

Ecolabels are most successful when they are accompanied by a third-party certification process (Howard & Allen, 2010). One example of this is the Marine Stewardship Council (MSC) label for fish. This program not only acts as a third-party certifier of the fishery of origin, it also audits the whole supply chain. As a result, in a double blind study of fish traceability found that 70% of farmed salmon fillets were mislabeled as wild-caught, but every fish carrying a MSC label was properly identified (Cooper, 2012; Stiles, et al., 2011). One of the program's participating fisherman said, "It took a couple of years, but in the end, not only did the certification keep doors open to our global markets, it allowed us to put the MSC label on our products. That means that consumers can trust that they are getting what they are paying for, and that they can track where the seafood they are buying came from," (Cooper, 2012). Although this program is ensuring traceability of fish products and is occupying an increasing amount of cooler space at values-based retailers, it is not without detractors who accuse it of being out of line with consumer interests and values (Loring, Gerlach, & Harrison, 2013). Some fishers on both Atlantic and

Pacific coasts, meanwhile, have taken matters into their own hands by launching community supported fisheries where a customer buys a "subscription" to a certain supply of seafood. When delivered, the box of seafood often includes the specific name of the fisher and their vessel.

In time, market pressures will degrade certification standards, much like the organic standards and the fairtrade standards, thus alienating many of their original advocates. For example, the original intention for the organic movement was to promote holistic management strategies, but as the standards became more codified through the USDA in the 1990s, the holistic intention was lost in exchange for checklist standards leaving some producers to maintain monocropping systems while only swapping some inputs for others (Allen & Kovach, 2000). A recent round of revisions to organic standards has also angered many, and a "better than organic" movement is underfoot at direct outlets like farmers markets, where some producers are creating their own labels (see Figure 2).

Figure 2: Producers respond to degrading organic standards

Additional labeling efforts are leading many to discuss "label fatigue," or the counter-productive effects of competing labeling schemes (Goodman, 2004). This concern mostly arises from practitioners and marketers, potentially over concern that the current label of choice, whatever that is, will lose market share to an emerging label. Yet, anyone trying to buy the "best" egg these days may fall down from exhaustion before actually selecting a dozen, and the blogosphere has not let this go unnoticed (see http://www.huffingtonpost.com/2014/04/09/food-labels_n_5091344.html as one humorous example). Consumers, nevertheless, almost always indicate on surveys a desire for more information about the impacts of their purchasing decisions, and product labeling is a preferred avenue for the information (DaSilva, 2014; Howard& Allen, 2010; Loring, Gerlach, & Harrison, 2013).

Despite consumer interest in having more information and the availability of over 200 eco-labels to choose from, most products don't carry any sort of designation (Hamerschlag, 2005; Howard & Allen, 2010; Organic Monitor, 2013). This could be less about consumer label fatigue and more about producer label fatigue. As producers must contend with more paperwork and food safety certification requirements, they may be less interested in collecting another designation. Furthermore, many locally and direct-marketing producers a more motivated to connect with their customers than undergoing various certification processes. For some, going to market is more desirable than filling out certification forms and assessments.

For producers interested in a label more than the principles behind it, a certification process may equate to little more than an exercise in fabricating production records, even when a third party inspection is involved. This further undermines the intentions of a labeling process. Where there is a market incentive to commit fraud, there will always be actors willing to do so; no certification or labeling process will prevent this. This is exactly the motivation for purchasing direct and local for many consumers. When integrity breaks down along the supply chain, a dedicated consumer will seek out a direct conversation with a producer and decide for themselves, and many "local" producers prefer it that way.

Informing Purchases— When, How, Where

Consumers state that they want more information about implications of their purchases and that they prefer product labels and retail displays for this information. Other options available on surveys include farm tours, speaking directly with the seller, videos, movies, print media, internet, and radio, all of which score significantly lower than product labels and product displays (Howard, 2006; Howard & Allen, 2010). Despite these stated preferences, revealed choice studies suggest that consumer decisions regarding food purchases are made at a variety of points in regards to various cues.

When to Communicate

At the Point of Purchase

Emerging leaders in the food marketplace are depending more on narrative marketing, cultivating a story and a sense of identity that is associated with the product. This particular type of marketing is effective on local purchasers, who are more motivated by the sense of place that is cultivated through their consumption than the actual qualities of the consumable (Hartman, 2013). Such marketing strategies can been seen at Whole Foods and other specialty grocers where "Know Your Farmer" posters are displayed alongside the local product. These techniques may help overcome the lack of social connectedness and interaction available at a larger grocery store.

Many market studies around grocery selection find that consumers usually make the easiest choice due to time constraints, distractions, and habits, and that decisions made at the point of sale can rarely be influenced by labeling or promotion without dynamic interaction or a significant disruption to pattern. Due to a dynamic combination of these variables, the decision is often made before the consumer even leaves the house.

Before Intent to Purchase

One study of organic versus conventional purchases revealed store choice as a strong predictor of consumer choice. During this revealed choice study, purchases at a full-service specialty grocer and a cooperative market were compared across several produce products. The results suggested that even though organic and conventional products were available at both locations, shoppers at the cooperative market were more likely to purchase organic than at a specialty grocer (Thompson & Kidwell, 1998). This is supported by other studies, which identify consumers who primarily rely on direct marketing channels as more likely to purchase organic products and more willing to pay a premium for them, thus supporting the Theory of Planned Behavior (TPB). Consumers who choose to shop at cooperative grocers, farmers markets, specialty grocers, and other direct channels (produce stands, CSAs, etc.) more strongly believe in consumer activism than patrons of big box grocery retailers (Onozaka, Nurse, & Thilmany McFadden, 2010). If a consumer's choice is made before even arriving at a business location, as this research suggests, a retailer may be motivated to place additional emphasis on broad marketing in order to solicit new values-based consumers instead of focusing on displays and marketing inside the store.

In the 10 years since Facebook's launch, the site has dramatically impacted how, where, and when information is transmitted, and has increased the weight of customer experiences. This seems particularly true in the area of food, where people share recipes, pictures of meals and products, and experiences on blogs and other forms of social media. More and more, industry reports find that people rely on their friends and families as their primary sources of information and one report cites that 43% of people access information regarding food products online, daily (DaSilva, 2014). **This implies that any information should be easily conveyed across a variety of dynamic social media platforms, not just on websites or in traditional marketing outlets, where information would be considered more static.**

What to Communicate in a Broad Campaign

While common wisdom suggests that marketing needs to be simple, straightforward, and only communicate one message, this may not hold up in the face of a multi-faceted, values-based shopper. Instead, messaging around "taste," "place," and "face" will resonate with a locally minded consumer (Hamerschlag, 2005). This catch phrase perfectly aligns with Eriksen's paradigm for geographic, relational, and values proximity mentioned earlier (2013). Locally minded consumers want to know that they are buying a high quality product, they want to know where it's from, and they want to know the story behind it. Furthermore, locally minded consumers have a strong interest in transparency. Attempts to overtly control the "story" or "face" will disenfranchise consumers, leading them to seek out their own story through direction relationships.

Perceived consumer effectiveness (PCE) studies suggest that information campaigns and labels may be more effective if specific impacts are also communicated. These studies also show that willingness-to-pay fluctuates with PCE. (Onozaka, Nurse, & Thilmany McFadden, 2010). That is to say, for example, that it is not enough to say something has a low carbon footprint, but that carbon emissions need to be quantified on the label. Specialty water fountains that "count" the number of water bottles kept out of the landfill by using the fountain are a great example of this. **In order for consumers to feel empowered in their decisions, they need to know that their purchasing decisions have real consequences and they need to know what those consequences are, especially over the long term. The more the consumer feels empowered and that her choices result in desired impacts, the more she is willing to pay for various products.**

What to Communicate by Market Typology

The degree of local washing possible, and the amount of information sought by consumers, varies across marketing typologies. The further a product gets from its source, the more valuable that information becomes and the more likely its information will be compromised. A discerning consumer will not consider a food "local" if it gets too far away from its point of origin, both in distance in the supply chain. If nothing else, production location address should remain intact across the supply chain, at least in the form of a town and state. When a site of production address is present on all products, then a consumer can choose for herself based on her own set of criteria for "local." It's important to keep in mind that the consumer's values and thus product preferences are deeply held; shaped and informed before the point of purchase. At the end of the day, if the question is, "what should we communicate about each product?" the answer should always be, "whatever the consumer needs to make an informed decision for themselves."

Produce Stands

Produce stands typically come in two forms— a small stand at the end of a driveway at a farm selling only produce grown at that farm (sometimes based on the honor system), and large produce stands where one anchor farm may sell their own products alongside products from other farms to ensure a full and varied selection. A third type of "produce stand" is more akin to a specialty grocer.

In the absence of point of origin information, the average consumer might like to believe that all produce stands are stocked with items grown by the anchor farm, or at least by farmers in the area. This is not always the case, however. To this end, the North Carolina Department of Agriculture and Consumer Services certifies produce stands, requiring that the owner/producer grow 51% of the products sold and that the remaining produce come from other North Carolina farmers. The owner/producer must be a certified grower, as verified by the local county extension agent. Certified produce markets received a plaque to display at their stand and they receive marketing benefits through the Department of Agriculture and Consumer Services (North Carolina Department of Agriculture and Consumer Services, n.d.). This certification process could just as easily include a mandate to disclose product sources and product practices.

Farmers Markets

Most people assume that farmers markets are just that, a place where farmers and their staff market the goods that they grew themselves. While some consumers are willing to accept one grower selling the product of another grower in the area, many locally-oriented consumers are unwilling to accept a vendor that wholesales or brokers produce from out of state at the local farmers market. As always, the consumer should be empowered to choose through clear communication.

As North Carolina certifies produce stands, some states certify their farmers markets. For example, in California, all certified farmers markets are producer only markets with no wholesaling/brokering allowed. Participating growers must also be certified direct marketers by the state as well (California Department of Food and Agriculture, 2014a). Similarly, the Mississippi Department of Agriculture certifies farmers markets. The certification process requires that vendors produce 50% of their products themselves, however the other 50% can come from out of the state and be resold at the market. Products produced in state and sold at certified farmers markets are exempt from state sales tax (Mississippi Department of Agriculture and Commerce, n.d.). As of this writing, Washington State University and farmers market advocates in Washington State are currently undergoing an in-depth feasibility study for a statewide certification program (C. Donovan, personal communication, May 21, 2014).

While many markets have internal regulations regarding acceptable products and sourcing protocols, such policies are, unfortunately, not necessarily communicated to the public. As a best practice, the Farmers Market Coalition urges market managers to clearly communicate the policies and criteria used to establish a farmers markets on their websites, at their information tables, and even on marketing materials ("Sunvalley Farmers Markets — A Producer Only Market"; Farmers Market Coalition, 2010), and the vendors should be required to disclose their own sourcing and production practices, as well as the origins of their products if they are reselling or using other ingredients for value added products. Well-resourced markets are moving towards uniform signage displays for each vendor's tent/booth, which may include the name of the farm, location, any production practice certifications, and accepted currencies. A designation for non-farmer "wholesaler" or "broker" should also be considered.

Community Supported Agriculture (CSA)
The original intention of CSA —to share the risk and reward of farming —facilitated clear and transparent communication between consumers and producers. One would assume that by the time a consumer agreed to buy into a farm and share in the risk, that consumer had all the information she needed to satisfy her preferences for the products. More recently, as the popularity of CSAs has grown, consumers are presented with a variety of options for CSAs. Some farms belong to a CSA network where the shares are marketed and brokered by a third party organization. Some farms supplement their own shares with another farm's produce in times of crop failure, a practice that could undermine the whole intention of a CSA. Some CSAs are clear from the beginning that a share may be composed of products from many farms and the identities of those farms are disclosed. As with other retail environments, the origins of the products and production practices should be disclosed. If the CSA represents several farms, the selection criteria for those farms should be readily available to the consumer.

At this time, there appears to be no group or organization attempting to certify or codify CSAs nationally. Several states with pro-active agricultural support organizations have CSA databases, but these databases feature disclaimers that encourage consumers to ask questions and verify the farmers themselves. Recent California legislation gives the department of Food and Agriculture (CDFA) authority to regulate CSAs, and the agency has proposed a mandatory $75 annual registration fee (California Department of Food and Agriculture, 2014b).. All producers for these CSAs must already be certified direct-marketers in California and must agree to attempt to follow all Good Agricultural Practices (GAP) (California Department of Food and Agriculture, 2014a).

Farm-to-Plate Restaurants
Given the recent popularity of locally grown foods, an increasing number of restaurants are advertising "farm-to-plate" items. Some locavores express concern that some restaurants that might source a single product once from a local farm and claim to be a farm-to-plate restaurant. Or in the case of fish and chicken, it is easy to swap one product for another, and studies have shown farmed fish is regularly a substitute for wild-caught fish in restaurants (Cooper, 2012). Certainly, it is extremely difficult to source *everything* locally; many restaurants that have made good faith efforts to do so have found it economically infeasible both because of sourcing complications and because of inadequate consumer demand for certain seasonally available products (Hewitt, 2010; McCart, 2014). Yet high-end restaurants like Chez Panisse have found success featuring only local and seasonal products with a rotating menu. Restaurateurs seeking to honor the local food system should be willing to specifically mention their local sources and advertise their locally purchasing policies.

Like locally owned grocery stores, a locally owned restaurant featuring ambiguously sourced foods from a broadline distributor may still appeal to some locally minded consumers. Better still may be a locally owned restaurant that sources local sodas, chips, and breads, even if all those products are produced with ingredients grown outside the region. The economic benefits of local purchasing are not limited to agricultural commodities and cottage food preserves.

Food Cooperatives, Specialty Grocers

Food cooperatives, specialty grocers, and buying clubs may be local-friendly retail environments, or they may not. Some specialty grocers will prioritize certified organic products over locally grown products, while buying clubs may be motivated more by price. Locally minded retail environments should include their sourcing policies and priorities prominently, just like at the farmers markets. Retailers have the added responsibility of communicating on behalf of the farmer. At a minimum, this should include the name of the farm and the point of origin for all the produce, but may also include pictures, biographies, descriptions of production practices, or other farm details.

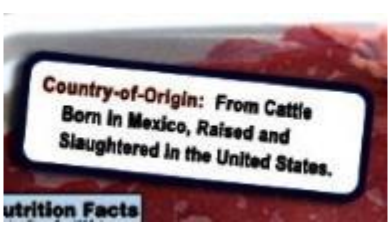
Still, a grocer may also be locally owned and show no preference for locally produced products. In this situation, a locally minded consumer may still show a preference for this local grocer over a big box retailer since some values commonly associated with locavores (as described above) are still fulfilled by this retailer.

Current "Local" Food Labeling Efforts

Consumer Reports uses five criteria to evaluate and recommend various consumer eco-labels. Although these criteria are not food specific, they can be seamlessly applied to local foods and their many potential labels (which are further discussed next). These five criteria are as follows:

- **Meaningful, verifiable standards:** Eco-labels should have a set of environmentally meaningful standards. These standards should be verifiable by the certifying group or another independent inspection organization.
- **Consistency:** An eco-label used on one product should have the same meaning if used on other products. Standards should be verifiable in a consistent manner for different products.
- **Transparency:** The organization behind an eco-label should make information about organizational structure, funding, board of directors, and certification standards available to the public.
- **Independence:** Certifying organizations and their employees should not have any ties to, and should not receive any funding, sales fees, or contributions, from logo users except fees for certification. Employees of companies whose products are certified, or who are applying for certification, should not be affiliated in any way with the certifier.
- **Public comment:** All certification standards should be developed with input from multiple stakeholders including consumers, industry, environmentalists and social representatives in a way that doesn't compromise the independence of the certifier. Industry representatives, for example, can play an important advisory role without having direct financial, decision making or management ties to the certifier. (Consumers Union of United States, 2013)

Geographic Labels



Country of Origin Label (COOL)

Country of Origin Labeling is mandatory under the Farm Security and Rural Investment Act of 2002for fresh meats, produce, and nuts. Processed foods are not required to carry such as label. Proponents of the law argue that consumers are demanding this information, whereas opponents argue that it represents a trade barrier to imported goods.

State Branding Campaigns

State branding campaigns such as Certified SC Grown or Colorado Proud are very popular and are often led by state departments of agriculture through their marketing divisions. Participating producers are provided with additional marketing opportunities and in some states, such as Kentucky, food services providers receive a subsidy for buying Kentucky grown products. Often branding programs such as these promote labeled global brands, not local (consider Idaho-branded potatoes). While most people think favorably of these programs, others feel like they don't do enough. In Colorado, for example, a value-added food product can be labeled "Colorado Proud" even if it was merely packaged/manufactured in the state, leading some value-added producers to advocate for a "Colorado Grown and Made" label. Recently, the State of Colorado has taken this to its natural end with brand COLORADO, seen in Figure 3. In South Carolina, the state "certified" label has been misappropriated so often that some consumers express mistrust in the entire labeling process (Meter & Goldenberg, 2013).

Figure 3: Colorado takes state branding to another level.

Food Alliance

Food Alliance, based in Portland, Oregon, provides the food and agriculture industry with sustainability standards, evaluation tools, and a voluntary, third-party certification program tailored to specific sectors based on these principles:

- Protect, conserve and enhance soil, water, wildlife habitat and biodiversity
- Conserve energy, reduce and recycle waste
- Reduce use of pesticides and other toxic or hazardous materials
- Maintain transparent and traceable supply chains
- Support safe and fair working conditions
- Guarantee food product integrity, with no genetically engineered or artificial ingredients

- Ensure healthy, humane animal treatment
- Ensure continual improvement of practices

Food Alliance was formed in 1993 and expanded nationally in 2005, with regional representatives in the Midwest and Northeast/Mid-Atlantic. It has also created multiple labels, as seen in Figure 4, including regional labels. There are far more certified operations in the Northwest than anywhere else in the world. This is mostly due to the Alliance's origins in that region, and to the intricate connection the label had to the growth of local foods businesses. The Midwest office has closed down, in part because the Alliance label was more often perceived in this context as an "outside" organization setting standards in areas where well-developed and robust food systems and support organizations were already in place.

Figure 4: Food Alliance has developed many sectorial and regional labels

Buy Fresh, Buy Local

Buy Fresh, Buy Local, a program of Food Routes, provides tools, resources, and marketing supporting to state and local chapters seeking to support their own local food systems. The easily recognizable label can be customized to reflect various chapter regions while still maintaining the benefits of a brand or label.

Locavore Index— Strolling of the Heifers

This index ranks states each year based on an increasing number of local food systems criteria including number of farmers markets, CSAs, food hubs, and farm-to-school programs on a per-capita basis (Langeveld, 2014). These criteria are assigned various weights in a fairly abstract manner using data provided by the USDA and localharvest.org. This index is an interesting gimmick, but does little to support the development of local food systems or verify the integrity of the registered CSAs, farmers markets, and food hubs. The website also contains "10 Reasons to Shop Local" which Born and Purcell have struck down in their paper, "The Local Trap," which has been cited many times earlier in this paper (2006).

Real Food Challenge

The Real Food Challenge is a student-led, national campaign to divert university funding away from "industrial farms and junk food" to what they define as real food. The standards are broken into four categories- local and community based, fair, ecologically sound, and humane. Within these four categories, foods can receive a green, yellow, or red light based on various criteria. The green light criteria for local and community based are as follows:

- Producer must be a privately-traded or cooperatively-owned business that grosses less than 1% of the industry leader.
- Independently owned businesses must have full autonomy and decision-making power about business processing & distribution practices.
- All production, processing, and distribution facilities controlled by the producer, its parent or family companies, and contract farmers must be within 150 miles of the institution

Students can audit their own cafeterias by going through a training process and uploading information into the Real Food Calculator. The whole process is estimated to take 100-200 hours.

Answering the Research Questions

Building on the information gained through the literature view, we also wanted to test and build support for some of our assumptions about the direction of the project, and gain feedback from our stakeholders, including farms, famers markets, and food-related businesses in order to better understand their current practices and challenges related to defining and communicating about local food. We employed multiple methods including surveys, focus groups, and interviews. We framed this stage of our inquiry around three main research questions:

1.) What are current definitions of local foods used by farms, farmers markets, and food-related businesses, and how are these communicated to consumers?
2.) What are the most important values embedded in the concept of "local food" and how can these be measured?
3.) What is the need for and feasibility of a self-assessment tool that measures and helps to communicate a retailer's engagement within the local food system?

Defining and communicating local food

The project team is interested in how farmers markets, and food businesses including restaurants, retail stores, co-ops and subscription style operations currently define "local food" and the challenges they experience in developing or communicating their "local" message.

Through our long-form survey, we found that of all survey respondents (n=259) 58% have written guidelines about food origin or local food sourcing policies that specify a geographic boundary from which food must be sourced, and while most (52%) display this policy on their website, fewer display this information at the point of purchase (13%) or in their logo tagline (7%).

When these responses are broken out, we find interesting and important differences between farmers markets nationally, and our western Pennsylvania Buy Fresh Buy Local business partners locally.

Of farmers market managers(n= 154), the majority (67.3%) say their market does have written guidelines about food origin or local food sourcing policies that specify a geographic boundary from which food must be sourced. However, these policies are not necessarily easily accessible to the public. Nearly three-quarters of managers (n=73) say their sourcing policy is available on their organization's web site, though observations of market web sites would suggest that in many case, policies are published online to inform potential vendors of regulations. Sixty one respondents included a web site address where their guidelines were available online. Just under 15% (n=15) say that their guidelines are in print at the point of purchase (presumably at a market information booth). Only 9 (8.9%) stated that their policy was incorporated into their branding as part of their logo tagline. Twenty of the responding markets (19.8%) offered additional places where such guidelines are accessible, including vendor applications, rules, or guides (n=10), or occasionally on press releases, ads, flyers, or, in one case, a "placard at each vendor booth indicates sourcing and distance to market." However, some noted that their guidelines were not publicly viewable, or only available on request.

In contrast, of the Buy Fresh Buy Local partners in western Pennsylvania (n=27), 81% reported that they do not have "written guidelines about food origin or local food sourcing policies that specify a geographic boundary from which food must be sourced."

The local sourcing policies that are established by Buy Fresh Buy Local partners vary in their definitions of what qualifies as local in western Pennsylvania. Several cited geographic parameters of 100 miles, another policy was more informal, using products from western Pennsylvania farms, and making exceptions only when the product cannot be sourced from the region, another referred to the boundaries of a specific watershed, and several specified a specific county.

Similarly, not all of the farmers market managers responding to the survey specify a number of miles in their guidelines. A range from 25 to 450 miles is reported as geographic parameters, and even for these respondents, mileage alone is rarely the sole geographic parameter, with some policies referencing "50 miles or within the county," "approximate range of 150 miles," "within South Carolina, with exceptions for North Carolina," or "Located within the state, and potentially bordering states if the product is high quality and is not available within the state." Many appears difficult to monitor or vague, such as "We prioritize local food, but we don't have a specific boundary," or "a minimum of 51% of all vendors must be farmers, with at least 70% of what they sell having been produced on their own farm. Vendors found to be reselling produce purchased at the Food Terminal will be suspended from the Market. The produce and value added products must be grown and/or produced in Michigan."

The lack of local policies defined by Buy Fresh Buy Local partners might be explained by the fact that about half of those who responded identified themselves as farmers/producers, and therefore may be less likely to need an official written sourcing policy. However, many farmers in the region do sell agricultural products from other farms, in addition to what they produce themselves.

For example, one family farmer near Pittsburgh, Pennsylvania raises vegetables and sells them at markets within 25 miles of the farm. The farmer also runs a market retail store, where in addition to his own vegetables, he also sells meat from a local butcher, and milk from a local commercial dairy. Other local products include maple syrup, honey and mustard made by a local processor. In the retail store, products are labeled "local" but not with the farm name where they are produced. Without a set policy, the way local items are characterized is not consistent. The farmer explained that the peaches he buys in season from Chambersburg, Pennsylvania are not labeled "local" although the apples they purchase from the same region in the fall are labeled as "local."

Labeling of local products, with location of origin and farm name is a more common practice among both farmers markets and Buy Fresh Buy Local partners, with the majority of respondents in both groups reporting that they do label local products to some degree. **This suggests that even for those without a clearly defined local sourcing policy, markets and businesses are making efforts to be transparent about the origin of the foods they are selling, and this could be further enhanced or improved with clearer definitions and communication of local sourcing policies and priorities.**

Beyond Food Miles

Through our focus group discussions and interviews, we find that "local foods" has a deeper meaning for many farmers and food businesses and this goes beyond what might be captured in a local sourcing statement, and certainly beyond the number of miles food travels from production to consumption.

Initially, through our focus groups and mini-survey at PASA's 2014 *Farming for the Future Conference*, we discovered five common themes around the ways that farms and food-related businesses explain the meaning of local. As we suspected, PASA members understood "local" to go beyond food miles. The concept of local foods also represented other values for the businesses and growers committed to sourcing and/or marketing locally. In addition to **geography**, **local economy**, **direct relationships**, **growing practices**, and **transparency** were all important to the meaning of local for those respondents at the conference.

Geography was still by far the most common way that focus group participants explained the meaning of local, upon initial reflection. Respondents tended to quantify "local" in terms of the miles the food travels from site of production to a site of sale or to the consumer themselves. "Local" distances ranged from as low as 25 miles to as many as 500 miles. Some added nuance to this such as "Local goes beyond state lines like a watershed", while others found value in political boundaries, defining local as "the state I live in."

Restaurateurs in our focus groups mentioned the local economy as another factor of defining local foods. For them, it was important that the sale of local foods was contributing to the local economy, in that the cost of local food was keeping wealth in the community. However, a challenge related to this, and cited as a frequent problem, is that few restaurants specify the actual amount of local food they source and use, and therefore their actual impact on the local economy is hard to measure.

The importance of direct relationships between consumers and producers as an aspect of local foods came up several times in discussions. "There is a spectrum of "locality" but I think the gold standard is a direct personal link between producer and consumer, because of its implication for accountability," said one respondent. Farmers identified this as central to a definition of local, and food retailers and grocery stores emphasized this as a priority as well.

Many who participated in discussions identified growing practices as an important qualification of local foods, specifically environmentally sustainable growing practices. This was especially important to the grocery store and food retailers who participated in discussions. Their customers not only care about where food was grown, but also how it was produced, and they therefore value certifications (organic, etc.) to help further differentiate local products they sell.

The broad concept of transparency was a recurring theme throughout discussions. This seems to relate to the direct relationships between producers and retailers or consumers, and the ability to get information about food origin and how it was produced. Transparency exists when "the consumer is given information on the origin of the product" as one respondent said. Another mentioned it was important to be transparent about both the farm and farming practices. Transparency involves clear and open communication, and the Real Deal project is striving to develop tools that will help farmers markets and food related businesses achieve more transparent communication about local food sourcing, and empower them to present a clearer picture of their full engagement in the local food system, beyond food miles, and encompassing the full package of values encompassed within local foods.

Local Sourcing and Communication Challenges

With few interpretations of local food being cut and dry, it is not surprising that many markets' cite challenges or complications in communicating sourcing practices to customers.

In general, on a national level, less than half of all farmers market managers reported challenges or complications communicating the number of products available from local producers (44.7%, n=67), the origin of ingredients in prepared or value-added foods (36.7%, n=55), value-added foods produced by a farm from ingredients they did not grow, and the number of local independent producers supported by your operation (29.3%, n=44). In contrast, of PASA members and Buy Fresh Buy Local partners in Pennsylvania (n=54), 76% (n-19) experience challenges communicating the number of products available from local producers, and nearly half (48% n=12) have challenges related to communicating the number of local independent producers supported by their operations. **Because PASA and Buy Fresh Buy Local respondents are less likely to have a written local sourcing policy, they also may experience more challenges than farmers market managers in tracking and communicating their engagement in the local food system with their customers.**

More than a third of market managers (n=55) offered more detail about their challenges or complications, many of which were less about customer communication than about the policy itself. Some cited challenges verifying claims: "There have been concerns that some people are not producing the items they say the produce or that the ingredients have not come from the sources they claim to have gotten them from." Another market cited issues with "vendors stretching the line of 10% [permitted to not be grown by the vendor]"

Other seemed apprehensive about losing vendors and shoppers by too narrowly limiting product origin, with comments such as, "If we were stringent on the rules we would lose products," "We strive to balance dogma with reality," and "The number of 'local food' producers does not meet demand."

One rural market noted that "in order to retain enough vendors to be a vibrant market, we could not mandate that all ingredients or products have origins within a given geographic boundary. While foods must be produced locally, the ingredients can be purchased elsewhere. Similarly, vendors can sell products grown or raised on their property from outside our geographic area, as long as they also have local products in addition."

These sourcing limitations are also experienced among PASA member businesses in western Pennsylvania. One respondent echoed the rural farmers market's sentiment, stating, "It is shocking for such a rural area as we live in, Greene County, Pennsylvania (Appalachia), that there are so few producers of locally made and grown products." Other respondents from western Pennsylvania mentioned that supply of local products does not currently meet demand for various reasons. "We need more local and regional food processors," one respondent explained. Another shared a dilemma, "I have heard from several growers that there will not be peaches available this year due to the severe winter. Should I not sell peaches this year? I'm all about local and getting people to eat seasonally and regionally. I'd love to say sorry, no peaches this year. I hope you canned a lot last year. BUT...the business women in me says, source as local as possible and just have a sign explaining where they come from and why they are out of my 50 mile buying zone. It's a grey area." Clearer definitions and standards for local foods in the region, and well-communicated sourcing policies may help farmers markets and food related business in western Pennsylvania to make this "grey area" more transparent.

Of all survey respondents together, responses were divided generally equally in terms of having customers who frequently request more information about the products they buy, reporting as much as they feel customers are interested in knowing, and wishing to provide clearer product information to customers, if doing so did not consume a great deal of time.

Among market manager respondents offering comments (10.6%, n=15), some said specifically how they communicate with customers, including a weekly newsletter in which "it's easy to incorporate new ideas and facts," and "signs with number of miles for Earth Day." One respondent claimed that their market has "robust and intelligent social media conversations," while another said its customers "are encouraged to ask questions about any product at the market, which is why we require producers to be on-site."

Other managers cited challenges to customer communication: "Only customers who are invested in local food movements care about this, which is not a majority of our customers," and "we are always searching for a messaging strategy to distinguish our producer/local only market from other farmers markets with no geo-limit." Additionally, language was a barrier for one market which has "a primarily low-income customer base, many of whom do not speak English."

This indicates that there is a need among survey respondents for additional tools and resources to improve communication to customers about product information and sourcing, as long as the methods are efficient, targeted, and not time-consuming.

Identifying values associated with the concept of "local foods"

In order to identify the most important values associated with the concept of "local food," and to test the findings of our literature review and our initial focus groups, we included a question in our long form survey asking respondents to rank a series of values identified through our review of the literature and discussions with members. Respondents (n=227) were asked to rank a set of values based on how important they are to the business, farm or market, and customer satisfaction, based on a scale from not at all important to very important. The values included: the number of miles food travels, contributions to the local economy, relationships between producers and consumers, natural resource stewardship/ecological sustainability, transparency/open access to information, farm viability, social justice/equity, ethnic and cultural bonds, and freshness/product quality.

As suggested in the literature review, freshness/product quality received the highest ratings of importance. Also ranking highly were relationships between producers and consumers, followed by contributions to the local economy, transparency, and farm viability. These responses also support our findings in the literature that the number of miles food travels is less important relative to some of the other values from both a business and consumer perspective. Values that were ranked less important included natural resource stewardship, social justice/equity, and ethnic and cultural bonds, however they still received very few respondents ranking them of no importance at all.

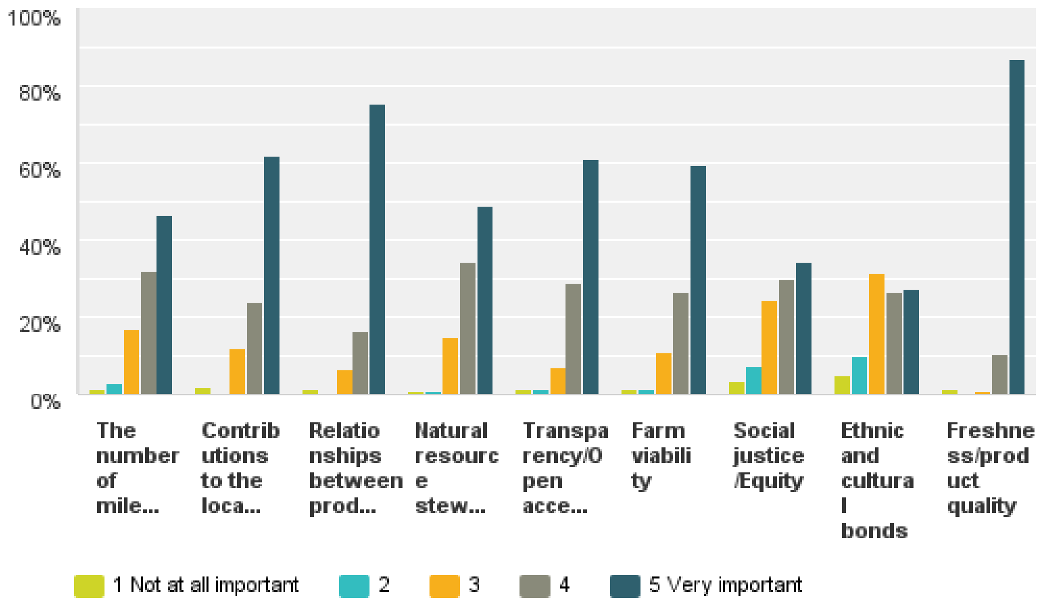


Figure 5 Ranked values associated with local foods in response to the question "Please rank the following values based on how important you feel they are to your business, farm or market, and customer satisfaction."

This clearly depicts a much deeper definition of "local foods" and what it means to be engaged in the local food system than is captured through a simple definition of food miles. Indeed, during a focus group discussion with the Pittsburgh Food Policy Council in April, when asked what local meant to the participants in the meeting, they initially responded with definition related to their organizational policies—250 miles and the state of Pennsylvania, 11 counties within our service area, a day's drive. But upon further reflection, these values became central to the conversation. For example, some cited the benefit of fresher produce on account of shorter supply chains, the sense of community that develops from producer-consumer relationships, and the importance of transparency and the ability to visit a farm where food is producer or learn about a farmer from information on a website.

Survey respondents (n=224) were also asked to rate a list of geographic parameters based on how closely they align with their business, farm, or market's interpretation of local food. These results were quite spread out and varied. "Within a certain number of miles" aligned closely with the most respondents, and boundaries related to a state, surrounding states, or a general region were also rated highly. Natural boundaries seem to be less aligned with the geographic parameters respondents have set, as well as county boundaries.

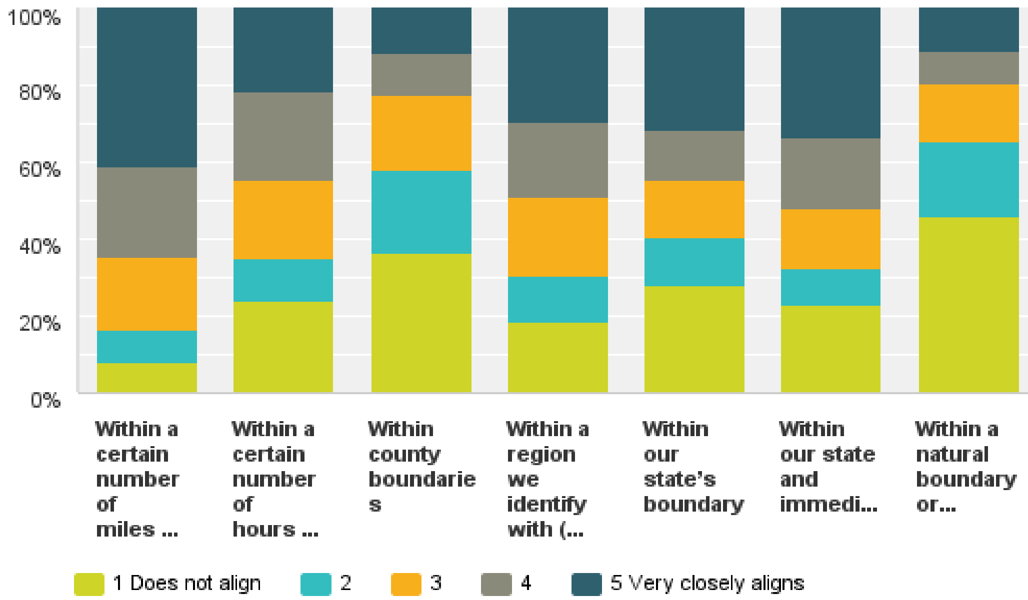


Figure 6 Responses to the question "Please rank the following geographic parameters based on how closely they align to your business, farm, or market's interpretation of local food"

There are likely many factors that businesses, farms and markets consider when deciding geographic parameters. One respondent explained the geographic parameters "vary according to product, and are relative to regional availability," and another elaborated, "What I consider to be local is often relative to the product. For example, something that is not available in Pennsylvania is better sourced in New England than from the West Coast." Markets may also determine how far a farmer in a rural area may have to transport their products—one respondent explained, "Within a marketing radius. Where does a farmer consider their best marketing outlet?" Another important factor for businesses is customer perception. One respondent explains, "State lines have been a limitation. We sell from farms that are more miles from Pittsburgh than Ohio or West Virginia, but we still consider the western Pennsylvania farms more of our foodshed because it is a geography that our customers identify with more." Another respondent sums it up well, when describing the different definitions of local they he navigates, "Our farmers market keeps local defined within our county and surrounding counties. Local by standards of a restaurant I vended to considered local as a 100 mile radius. I consider local to be less than an hour drive in any direction. Local is very relative."

Feasibility for Project Tools and Resources

The final question the research team explored was the feasibility for a self-assessment tool that measures and helps communicate a farm's, market's, or food related business's engagement with the local food system so that consumers can compare retailers and make more informed decisions.

Potential use of self-assessment tool

When respondents were asked how likely they were to use a self-assessment tool to understand and evaluate their organization's level of engagement in the local food system, food retailers rated their likeliness slightly higher than farmers market managers and producers, and no retailer responded that they were not likely to use a self-assessment tool at all. **Producers selling directly to consumers, for whom local is inherent to their business model, may feel such a tool to be unnecessary. Retailers, on the other hand, have a stronger need to describe and assess their local sourcing practices.**

Table 1 Reported likeliness to use self-assessment system (Scale of 1-5, 1 not likely, 5 very likely)

ALL (N=214)	Farmers Market Manager (N=126)	Producers (N=70)	Food Retailers (n=21)
Mean score: 3.65	Mean score: 3.70	Mean score: 3.21	Mean score: 3.9
Not likely (8.4%, n=18)	*Not likely (4.8%, n=6)*	*Not likely (20.0%, n=14)*	*Not likely (0)*
Very likely (29.0% n=62)	*Very likely (25.4%, n=32)*	*Very likely (22.9%, n=16)*	*Very likely (33% n=7)*

Without providing specific visual examples, the survey sought feedback on various potential formats for communicating self-assessment results with customers. Among all respondents, as well as market manager, producer, and retailer sub-populations, a descriptive system with specific examples ranked highest, more preferred than a numerical scoring system or a tiered rating system. Many respondents submitted comments on this question, many noting caution about potential complication of an already-complicated web of messages. Easy to use, intuitive graphics were noted as a priority by several managers.

Table 2 Potential formats for self-assessment results

Format media	ALL (N=210)	Manager (n=126)	Producers (n=68)	Food Retailers (n=21)
A descriptive system that shows specific examples of my operation's engagement in the local food system through a set of graphically-represented metrics (i.e. number of farms, number of products, dollars spent, etc.) based on our self-assessment results.	3.7	3.7	3.1	3.4
A tiered rating system that identifies my operation with a specific level of engagement in the local food system (i.e. Bronze, Silver, Gold), based on our self-assessment results	3.1	3.0	2.9	3.3
A scoring system that shows a numerical rating (i.e. 80/100) to represent my operation's achievements related to our self-assessment results	3.2	3.1	3.0	3.2

Some market managers expressed interest in a simple tracking system in which results would "improve our brand reputation" and "help engage the public and get them involved more in our market." Others expressed that “labels can discourage conversation about the purpose of the label. We find that fostering discussion and transparency are better paths.” Emphasizing the importance of simplicity, one retailer added, “I doubt any system that requires the customer to read either a detailed description of the results or a description of the meaning of the tier or score will get much attention. A simple straightforward metric, like miles of transport per dollar of produce expenditure, would be easier to feature and communicate.”

While one market manager thought a self-assessment system might “help to know how we are doing relative to other local town markets and …improve the level of engagement effectively,” others were very tentative about creating a competitive environment between farmers or other markets. Ranking systems were seen with some skepticism, perceived as complicating “an already delicate relationship that markets have with their communities.” One manager noting that mainstream retailers want to easy ways to show their “local” virtue, and therefore, “it is important to get the core issues defined so they are difficult to co-opt. Ranking systems would play into their hands and don’t get to the heart of the reasons why regional food systems are important. “Also wary about rankings, another manager was reluctant to “add work to already overtaxed organizations, and create a competition amongst farmers markets, when we really should be trying to win over those who are shopping at supermarkets.” Along these lines, a smaller retailer cautioned about how comparisons might be drawn across retail establishments. “I would like to see a system that uses percentages on various measures, for example, the percent of sales that goes to local farmers, rather than straight dollar figures. Some of our competitors (large companies) may spend more dollars on their token local sales than we do on our mission-driven sales just because we’re smaller.”

Other market managers voiced concern about negative impacts of self-assessment. Eager for metrics that could help guide future policies, one respondent still said they “would take care in sharing assessments that might produce negative PR.” Similarly, a retailer voiced concern that a less than perfect rating could prove a disadvantage in the market. “I see a numerical system being more problematic than a tiered rating system, potentially causing an unintended rejection if a product is not top score. Could there be a subconscious reaction on the part of a consumer who might perceive a product rated with a score of 80/100 lower than a product not rated at all?”

Producers voiced somewhat more skepticism about the utility of an assessment system, feeling it was redundant, potentially adding a layer of complication to existing relationships with their customers. “Any system that requires the customer to read either a detailed description of the results or a description of the meaning of the tier or score” will have limited interest, one advised. One respondent warned that “providing weightings to the coefficients for each term (miles driven, dollars spent, utilities used, etc.) is going to be a contentious matter…for example, are you capturing the second-order effects of how your suppliers behave? What happens if I find a local source for my feed (let’s say 10 miles) but then I learn that operation behaves less responsibly? Should I consider that? Should I even investigate that? What if I can only learn about some of my suppliers but not others?”

Offering insight into the perceived priorities of their customers, one CSA operator estimated that only 20% of its members “are concerned about sustainability and nutritional value. The majority want food with no chemical pesticides and fertilizers. “While these values are closely linked, a system that emphasized the latter (i.e. a personal benefit from organic foods) may have more relevance for consumers. Straight forward, easy to understand metrics should be first and foremost.

While voicing support for a self-assessment, a few respondents suggested ideas along the lines of a third party assessment. "A more thorough [third party] assessment that is performed by a trained agency or organization would leverage data usable for leveraging funds and support from local, government and outside funders," one respondent suggested. Another offered, "What about a third-party assessment system of major retailers who claim to sell local products? The results could be published to consumers so they can decide if the results match their own values."

Recommendations for continuous improvement

Average rankings were similar when survey-takers were asked how useful recommendations based on self-assessment results would be to help improve or expand local food sourcing initiatives. Among the entire respondent population (N=213), usefulness was ranked 3.65 on a scale of 1 to 5, slightly lower among market managers (Mean 3.61, n=127), and producers (Mean 3.0, n=72). One respondent specifically noted that scores should not be judgmental, but encourage improvements.

Formats for communicating self-assessment results

Clearly, different types of businesses may require different types of materials to communicate to their customer bases. Participants in the focus group discussion with the Pittsburgh Food Policy Council identified a need for more tools that help tell the local story. They suggested infographics that allow a business or market to customize or choose what aspects of local they want to promote. The discussion emphasized that businesses need options for how they use the tools developed, and different kinds of businesses need different kinds of materials—for example, small images that look good on the labels of value added products vs. a decal that restaurants might place in their windows.

In the long-form survey, we asked respondents to select up to three formats they were most likely to use for a graphic representation of their self-assessment results. For all respondents, as well as the Market Manager, Producer, and Retailer sub-populations, social media and web site topped the list, followed by newsletter (for managers) and point of sale labels (for producers and retailers). Nearly 25% of all respondents (n=52) said that they would use results in a Buy Fresh Buy Local online profile, while Restaurant menu (4.2%, n=9) and table tent (1.9% (n=4) both scored lowest (perhaps in part due to a lowers response rate from restaurateurs). Six respondents chose "none of the above."

Table 3 Preferred formats for communicating assessment results

Desired formats	ALL (N=213*)	Farmers Market Managers (n=126)	Producers (n=71)	Retailers (n=22)
Social Media	80.8% (n=172)	87.3% (n=110)	69.0% (n=49)	90 % (n=20)
Blog	19.2% (n=41)	17.5% (n=22)	19.7% (n=14)	13 % (n=3)
Web site	79.3% (n=169)	76.2% (n=96)	69.0% (n=49)	95% (n=21)
Buy Fresh Buy Local® online profile	24.4% (n=52)	24.6% (n=31)	31.0% (n=22)	4 % (n=1)
Restaurant table tent	1.9% (n=4)	1.6% (n=2)	1.4% (n=1)	4 % (n=1)
Restaurant menu	4.2% (n=9)	1.6% (n=2)	5.6% (n=4)	4% (n=1)

Window cling sticker	7.5% (n=16)	5.6% (n=7)	8.5% (n=6)	9 % (n=2)
Our Newsletter	35.2% (n=75)	37.3% (n=47)	26.8% (n=19)	31% (n=7)
Poster	22.5% (n=48)	27.8% (n=35)	22.5% (n=16)	22 % (n=5)
QR Code	2.3% (n=5)	1.6% (n=2)	2.8% (n=2)	0
Point of sale labels	31.0% (n=66)	19.8% (n=25)	46.5% (n=33)	36% (n=8)
None of the above	2.8% (n=6)	4.0% (n=5)	4.2% (n=3)	0

**N does not include respondents who selected none of the options (which included 'None of the above')*

A common theme among all the preferred formats is an emphasis on communicating with existing customers and their networks. While noting a need to expand their customer bases and reach new audiences, some respondents specifically suggested advertisements for newspapers or local magazines as desired medium. Keeping in mind that communication strategies for existing customers may differ from those for potential customers, results will need to be tailored to both needs. As one respondent stated, "Customers are already in the tent. It's the non-customers that are very hard to reach with the fresh, health, and sustainability messages. "Market managers seemed to feel that communicating metrics through social media, web sites, newsletters, and poster campaigns serve as valuable customer loyalty and retention strategies. Information that validate existing consumers' decision to purchase locally can happen parallel to campaigns reaching people who may not yet have made such a decision to seek out local products. One market manager noted that, despite encouragement, "restaurants, schools, groceries are still hesitant to source locally," so these audiences, too, should be considered in the design of metrics formats. Templates for press releases, newspaper advertisements, and even PowerPoint presentations to skeptical stakeholders would help serve the broader goal of being accountable to the public at large.

Additional comments at the end of the survey echoed a desire for statistics about chain or big box stores claiming their produce is locally sourced, so as to "differentiate ourselves from grocery stores saying they buy local when it is not even close to being local." A respondent from the South unsure about how a system would play out nationally said that, with "local" being used by Kroger and Whole Foods, their market is already "moving toward creating our own vocabulary" beyond local. A retailer noted that "Geographic origin is at the heart of our business and I would welcome a system that helps sort the mission-driven local foods retailers from the "token" and "hop on the bandwagon" food retailers who offer a few local products without any broader commitment."

Discussion and Recommendations

The research team has investigated the concept of "local foods" within the literature, and from the perspective of our project stakeholders in western Pennsylvania and nationally, among farmers markets. We have gained a better perspective on the currently used definitions of local food by farms, farmers markets, and food related businesses currently offering locally grown food, identified the most important values associated with the concept of local food, and explored the feasibility for a self-assessment tool that measure and help communicate retailers' engagement with the local food system.

We have learned important facts about consumer desires and purchasing habits related to local foods:

- Although local purchasing policies are generally defined by geographic proximities and boundaries, this is rarely the most important concern for consumers.
- Above all, consumers are concerned about quality, freshness, nutrition, and food safety, and this is not intrinsic to local foods
- Consumers also use "local" as a proxy for many other values, which may distinguish local foods from conventional foods and offer a competitive advantage.
- Local purchasers are motivated by the sense of place that is cultivated through their consumption than the actual qualities of the consumable; Messaging around "taste," "place," and "face" will resonate with a locally minded consumer.
- Consumers who are purchasing local products have already made this purchasing decision before they leave their home. Retailers can provide them with information to validate their purchasing decisions, while also conducting a broader marketing campaign to reach new consumers. In other words, customer validation/retention campaigns need to happen parallel to campaigns that reach people who don't seek out local products already.

From our stakeholder farms, farmers markets and food businesses, we have gained a better understanding of the kinds of tools and resources that would help them to better communicate their engagement in the local food system to the public:

- There is concern among farms, farmers markets, and food related businesses about the nebulous claims of local food in the marketplace, and an opportunity to build a program that encourages more transparency and integrity within the food system and helps consumers make purchasing decisions.
- Farms, farmers markets and food related businesses would benefit from additional resources to evaluate and communicate their local sourcing practices. Geographic definitions are a common way that they accomplish that currently, but food miles is not a high priority for consumers, and does not capture the full range of values that appeal to consumers who want to support local food.
- Of farmers markets, producers, and food retailers, retailers were most likely to use a self-assessment tool to evaluate their engagement in the local food system, and on average, most respondent were fairly likely to use the tool.

- A descriptive system that shows specific examples of a food related business's engagement in the local food system through a set of graphically represented metrics was ranked the highest as the most useful format for a self-assessment tool.
- Different types of business require different types of communication tools to reach their audiences, but all farmers markets, producers, and retailers indicated social media and websites as the best formats for them to display and share information about their engagement in the local food system.
- The Buy Fresh Buy Local program is a powerful and well received marketing campaign, and stakeholders feel that incorporating a self-assessment tool into this program would help to legitimize the tool as a resource. Furthermore, there is need to raise the visibility of the Buy Fresh Buy Local program, and additional resources that add more credibility to the program may enhance partner participation.

Crossroads Resource Center developed a series of recommendations related to the most important values embedded within the concept of local food, and suggestions on how a food retailer might assess themselves related to these values and their local sourcing practices (Included in Appendix). In addition, they suggest that instead of trying to determine how local food systems should be defined and graded, efforts could be designated to:

- Develop tools that provide consumers with clear and concise information and build the capacity of food related business to communicate that information.
- Provide better, clearer, uniform marketing materials for various establishments, so that sourcing policies (whatever those may be) and the stories of their products are communicated clearly.
- Create self-assessment tools and handbooks for engaging and supporting the local food systems work (involving a concise coding of local values) and for communicating to consumers the impacts of that work.
- Build campaigns to encourage consumer awareness, such as a local-food impact tracker.

Project Next Steps

-
- Crossroads Resource Center will develop models for the self-assessment tool and communication materials, which PASA, Farmers Market Coalition, Food Routes Network will test with our stakeholders through focus groups and webinar meetings.
- An RFP will be circulated for a designer to join the project team and develop the self-assessment and communication materials.

Appendix A. Taste, Place, and Face: Metric or criteria for evaluating consumer values

Local and community-based food systems are based in the mutual desire among farmers and consumers to create a more direct connection between food source and its consumption. Transparency allows the consumer to be actively involved in making specific selections based on solid information, rather than to passively rely on someone else's judgment. **Consumers on the cutting edge of the local movement want a *relationship* with their farmers, producers, and retailers. They often wish to decide for themselves what is acceptable and what is not, and may shun a static and narrowly defined formula someone else devised. Instead, energies should be focused on providing consumers clear and concise information and empowering vendors to deliver that information.**

As discussed throughout this paper, many values are served through the pursuit of locally produced products and focusing only on geographic proximity does a disservice to the locally minded consumer since "food miles" is of low concern to most locavores. Local isn't any one thing alone. Marketers would do well to focus on a couple of talking points while providing additional avenues for consumers to find more information based on their own desires and value structures. These top categories are broadly illustrated in Figure 1- intrinsic qualities (freshness, quality, nutrition, safety); extrinsic qualities (economic development, social justice, sense of place); and geographic proximity. **These categories can be roughly mapped onto the catchier phrase of "taste, place, and face" where taste is an intrinsic quality, face is an extrinsic quality, and place is geographic proximity; however, production practices plays an important role in all three of those categories and is also examined.** The rest of this paper explores potential metrics or criteria for evaluating various consumer values, relying on existing third-party certifying programs when possible.

Intrinsic Qualities or "Taste" - Quality, Freshness, Nutrition, Safety

First and foremost, consumers desire a high quality, safe, and fresh product. For many, "local" and "fresh" are synonyms. The "Buy Fresh, Buy Local" program was constructed around this consumer perception. Accordingly, this set of qualities and values is both the most important to consumers and has the most evaluation criteria already in place.

Many products already sold in common retail environments are graded based on quality before entering various supply chains. Direct market producers also tend to grade their products, offering most firsts and some seconds at market and finding other outlets for lower quality products. To a store keeper, however, "quality" may involve appearance more than actual freshness.

Possible Criteria for Evaluating Freshness/Nutrition

- Internal policy for capping or reporting the number of days between harvest and sale
- Internal policy for capping or reporting the number of days a product is kept at the store/restaurant
- Recommendations for producers to harvest within one or two days of a market or CSA delivery
- Internal policy for vendors to sign memorandums of understanding that outline appropriate storage temperatures and humidity conditions for various products
- Certification of handling and storage infrastructure for vendors and retail facilities

Possible Criteria for Evaluating Food Safety

- Internal policy requiring all vendors to have a GAP training or HACCP certification plus legally required licenses and product liability insurance
- # or % of vendors with GAP training or HACCP certification
- Provide food safety inspection reports of restaurants and grocers to public

Extrinsic Qualities or "Face"- Community Interaction, Economic Development, Social Justice

Although many local-seeking consumers equate their pursuit of local products with their desire for fresh products, it is, arguably, the extrinsic qualities associated with local food that are more essential to defining local since qualities like freshness and safety can be attributed to any properly handled product. These extrinsic qualities are hard to rank in order of importance for the majority of consumers; instead their importance will vary across consumer groups, and indeed even may vary within the same consumer over time.

A sense of connection among producers and consumers, support of purchases that increase community interaction and/or a sense of place, and the "story" behind the food are arguably the quintessential qualities of "local" food. Unfortunately, these are also the qualities most vulnerable to increases in scale. These are also potentially the most difficult to evaluate and the easiest to misappropriate.

Other extrinsic qualities—economic development and social justice, for example —are also difficult to evaluate and may be difficult for consumer to connect with. A nebulous claim often made by politicians and economists, such as "an economic impact of $8 million is possible through local food systems investments" maybe more abstract than consumers will identify with, but something such as "acres supported" or "farms supported" may be more appropriate. Similarly, social justice can be hard to define, but once the right metric or series of metrics and messaging is identified, it will likely take find a prominent place in the hearts and minds of values-based consumers.

Purchasing through a label, brand, or reporting template (or at a specific farmers market) may serve as a good proxy for connection to specific producers (for example, a consumer may purchase Food Alliance labeled food, or purchase from a farmers' co-op, under the assumption that this is a suitable substitute for an actual connection with a farmer, or out of a sense that the grocer or co-op acts as the consumer's agent in selecting high quality products that are sustainably sourced.

Possible Criteria for Evaluating Community Interaction and Sense of Place

- Percent of food items offered that are labeled with the name and address of the actual farm/producer that produced the product
- Producers, vendors visit the store/restaurant on various days to meet customers and perhaps offer taste samples
- Farmers markets may insist that the farmer-owner come to market to sell the product, rather than sending staff
- Open farm events are promoted
- Displays, menus, websites, social media feature the producers whose products are offered, and highlight their stories

- Number or percent of booths that are available in the farmers market for community causes or nonprofit organizations
- Number of volunteer hours the farmer or grocer donates to various community causes and/or community-based food organizations
- Number of sponsored social events, with attendance counts
- Producers are present at farmers markets
- Community engagement activities are featured at markets
- Sourcing and procurement policies are displayed for the public in the store, on the website, etc.
- Consumer feedback is solicited regularly regarding sourcing policies and priorities

Possible Criteria for Evaluating Community Economic Development and Impact

- Percent of budget spent at community-based suppliers or co-ops
- Percent of food items offered that are labeled with the name and address of the actual farm/producer that produced the product.
- Percent of budget spent with local vendors (however local is defined)
- Dollars spent with local vendors (however local is defined)
- Total sales at market
- Number of local farms, businesses, jobs, or enterprises supported (however local is defined)
- Number of acres supported

Possible Criteria for Evaluating Social Justice

- Number of vendors or products that are third-party certified by a social justice organization, including humane treatment designations
- Statement that living wage, overtime, rest days, and health insurance are provided to employees
- Statement that food assistance and access programs are in place
- Surplus food is donated to food banks and pantries
- Number of food drives that are held annually, pounds of community-produced food donated
- Businesses (restaurants, grocers, farms) are themselves third-party certified by a social justice organization

Geographic Proximity or "Place"

Although strict definitions of local based on some distance qualifier will not serve consumers' values and desires, trying to evaluate the localness of local food business would be remiss without some metrics or qualifiers for geography. The most elegant way to include geography would be to require that point location of origin, with a complete address or just naming a city and state, be carried through the supply chain to the point of purchase. This would allow consumers to decide whether or not to buy a product based on their own perceptions of local. For food safety and traceability reasons, this information is already tracked by larger distributors. Only a system for displaying it to the consumer is required.

A secondary option for evaluating geographic proximity is to allow the restaurant/grocer/market to define it. For example, a market may consider any business within 50 miles of the marketplace a local business, but allow other more regional businesses to be vendors. This market could report that a specific percentage of their purchases (or vendors) are "local" while the remaining percentages of businesses are "regional. "

Possible Criteria for Evaluating Geographic Proximity

- Display name and location of each farm that produced each product offered for sale
- Number or preceptor vendors/businesses/sales within some geographic boundary as defined by the user
- Number or percent of vendors/businesses/sales within a 50 miles radius of the point of sale, or within the state

Production Practices- Organic, Naturally Grown, IPM, Humanely Raised, etc.

Although the consumer who seeks out local products is different from the consumer that seeks out organic produce, their basic priorities and values are often very similar. Efforts to increase transparency and consumer confidence in the local food system must include some discussion of production practices and verification of those production practices. In direct-to-consumer marketplaces, consumers are mostly able to rely on the producers for information. However in an indirect retail environment such as a restaurant or grocery, or through a cooperative, that information needs to be conveyed through labeling and displays.

Possible Criteria for Evaluating Product Practices

- Internal procurement preference policy for certain production practices
- Number or percent of vendors/businesses/sales that are certified organic
- Number or percent of products/sales that are Non-GMO Project certified
- Number or percent of vendors/businesses carrying other third-party production certifications (Food Alliance, Biodynamic Certified, Certified Naturally Grown, etc.)

Appendix B. Real Deal Mini Survey

THE REAL DEAL

HOW DO WE DEFINE "LOCAL" IN A MEANINGFUL AND MEASURABLE WAY?

PASA, the Farmers Market Coalition, and FoodRoutes Network are collaborating on a new project to define, protect, and enhance the integrity of our local food systems. This project will be developed and piloted in Western Pennsylvania with support from the Henry L. Hillman Foundation. Based on the results, feedback from members, and ability to garner additional funding, PASA hopes to make tools and trainings available regionally, or even nationally.

Our goal is to engage retailers, farmers markets, restaurants, food hubs, and CSA organizers in creating clarity around what is "local," and to create typologies, tools, and training materials that can help decrease consumer confusion around the many claims of "local" increasingly used in the retail environment.

We want to learn about what "local" means to you, and hear your ideas for ways to prevent consumer confusion in a marketplace full of competing claims about food origin. Over the next six months, we will be conducting interviews and focus groups to inform this project, and will be looking for volunteers to test the tools and resources we develop later in the year.

ARE YOU INTERESTED IN BEING INVOLVED?

Please help inform our project by answering the questions below. Your information will be kept confidential, and your contact information will only be used for follow-up about other opportunities to provide input as the project develops.

Name: ____

Farm or Business: ______________________________________

Address: ____

____

Phone Number: ____

Email: ____

HELP TO INFORM OUR PROJECT BY ANSWERING THESE QUESTIONS:

What does "local" mean to you? ___________________________

____

____

____

Have you personally observed vague or possibly erroneous claims of "local" farm products in any of the following: (check all that apply)

- ☐ Farmers Markets
- ☐ Chain Grocery Stores
- ☐ Independent Grocery Stores
- ☐ Institutional Food Service
- ☐ Food Co-Ops
- ☐ Subscription or CSA-Type Operations
- ☐ Restaurants
- ☐ Other: ______________________

Please Explain: ____

____

____

____

Please bring this completed mini-survey with you to the "Real Deal" discussion on Friday at 2:45pm, or drop it in the labeled box at the conference registration desk before you leave the conference.

Pennsylvania Association for Sustainable Agriculture (PASA)

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Appendix C. Real Deal Long-form Survey