

Reframing Food: Understanding Trends in Consumer Food Purchasing and Implications for Agri-food Movement Mobilization in the Northwestern U.S.

Marcia Ostrom, Associate Professor, Center for Sustaining Agriculture and Natural Resources and School of the Environment, Washington State University, Wenatchee, Washington, USA

Raymond Jussaume, Professor, Department of Sociology, Michigan State University, East Lansing, Michigan, USA

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Abstract

This paper examines trends in the attitudes, behaviors, and meanings associated with food consumption in the northwestern United States. Particular attention is focused on the potential of various mobilizing frameworks to inspire individual and collective action to overcome substantial structural barriers to enhancing agri-food system sustainability. Research across the full spectrum of food system participants suggests emerging opportunities to reshape conventional, globally organized market relationships through the development of alternative, place-based food system linkages. However, research also reveals a complex array of motivations for participation in such efforts and key vulnerabilities and obstacles. The results of random sample consumer telephone polls, farmer surveys, and analysis of alternative marketing initiatives conducted over an eight-year period in Washington State indicate steady growth in the numbers of consumers, farmers, non-profits, and institutional food buyers engaged in alternative food distribution and procurement efforts. Nevertheless, despite vast agricultural production capacity and an apparently sympathetic public, only a tiny fraction of the Northwest food supply chain is currently sourced through such channels. This paper investigates (1) the various mobilizing frameworks and tactics employed to build alternative market relationships; (2) the extent to which these new market relationships are embedded in civic and environmental value systems; and (3) the effectiveness of these locally driven strategies in countering globalized market forces.

Introduction

Research across a broad spectrum of food system actors in Washington State reveals a wealth of emerging opportunities to reshape conventional, globally organized agri-food market relationships through the development of regionally-based, consumer-producer linkages that incorporate alternative sets of social, environmental, and economic criteria or “civic” values (Lyson 2007). Grassroots movements to revitalize small-scale agriculture, promote ecologically-based farming systems, and engage more producers and consumers in decisions about food production, distribution, and procurement are increasingly evident in this region. However, research also reveals a complex array of motivations for citizen and farmer participation in alternative food networks and key vulnerabilities and obstacles. This paper offers a broad overview of mobilizing strategies being employed to engage citizens in agri-food networks in Washington State and their effectiveness. Particular attention is focused on the ways that participation in alternative food initiatives is framed by farmers, consumers, and organizers and the potential for such actors to

coalesce into movements that can effectively counter the corporate-controlled and economically concentrated, transnational agri-food structure.

Social movements that seek to reconfigure the agri-food system employ a variety of tactics aimed at changing farming and marketing practices, public policies and institutions, and, ultimately, the meanings and cultural understandings associated with what it means to eat (Ostrom 2007). When the discourse around food can be “reframed” to include a connection with farmers, the environment, and an integrated food system, food begins to take on a larger meaning beyond a commodity or a purely economic good. With a growing understanding of the significance of their food choices and a belief that they can affect change, consumers across Washington, the U.S., and internationally are finding new ways to participate in decision-making about how food is produced and consumed, whether through individual food procurement decisions or through collective action. Alliances formed among producers, consumers, environmentalists, and food justice advocates to pursue goals of improved conditions for farmers, farm labor, and the environment, and to build widespread and equitable access to locally produced, healthy foods have been alternately described as movements for agri-food sustainability, food democracy (Hassanein 2003); civic agriculture (Lyson 2007) or food sovereignty (Wittman et al. 2010).

1. Mobilizing Frameworks: The landscape of alternative marketing initiatives in the northwestern U.S.

In response to an agricultural export economy that has steadily squeezed out small and mid-sized farms and the moderate-scale processing, distribution, and retail infrastructure that supported them; various new forms of direct and regional food supply chains are taking root in the northwestern U.S. Our research has shown widespread adoption and interest in alternative and direct market relationships among both farmers and consumers (Table 1). Beyond entrepreneurial farmers, health conscious consumers, and food system activists; planners and policy makers are increasingly recognizing the potential contributions of profitable, locally based food and farm enterprises for community economic development, as well as environmental protection and public health. Because of their rapid proliferation and growing significance, the state of Washington provides an interesting arena to investigate the dynamics of such alternative agri-food initiatives.

Because they involve personalized, direct relationships between producers and consumers, farmers markets and CSA are often seen as providing a framework that promotes civic engagement in agriculture (Lyson 2007). Such shortened supply chains are seen as noteworthy for their potential to capture economic value for farmers and to reengage and educate the public in agrarian concerns such as farm viability and farmland preservation while, at the same time, providing incentives for farmers to reorient their production towards agroecological approaches and meeting the nutritional needs of local consumers. Based on a random sample mail survey of the state’s general farming population, Table 1 illustrates the extent to which different types of direct marketing strategies are being employed by farmers in Washington.

Table 1. Washington Farmer Participation in Direct Markets

	Vegetable Growers (N=118)	Fruit Growers (N=332)	All Growers (N=1,166)
Roadside Stands/Stores	46.3%	21.2%	12.2%
Farmers Markets	35.2%	15.3%	8.2%
You-Pick Farms	23.4%	12.9%	6.8%
CSA	8.4%	2.1%	1.7%
Plan to increase direct marketing	45.8%	22.6%	25.3%

Adapted from Ostrom and Jussaume (2007: 242) based on a statewide random sample farmer survey.

The survey results displayed in Table 1 show that the use of direct marketing methods among farmers has become fairly common. Roadside stands or stores, followed by farmers markets and you-pick farms are the most common way that vegetable and fruit farmers sell their products directly to consumers. Almost 46 percent of vegetable growers compared with less than 23 of fruit growers say that they plan to increase their use of direct marketing (Ostrom and Jussaume 2007). Over one-fourth of growers overall say they plan to increase their use of direct marketing.

Farmers markets in the U.S. provide a dynamic setting for observing consumer, farmer, and community engagement in the food system. Nearly obsolete in Washington and elsewhere in the U.S. until a few decades ago, the revival of the community-based farmers market has become increasingly critical to the profitability and survival of many small, beginning, and immigrant-owned farms. They have also become increasingly popular with city governments and urban planners interested in revitalizing nearby business districts. Based on a strict definition of the term “farmers market” (requiring the presence of actual farmers who grow what they sell), the number of farmers markets in Washington has exploded over the past four decades, increasing 10-fold, from just 16 markets in 1978 to 170 in 2011 (Figure 1). Today these markets range in size from 3 to 92 farmers each, provide market outlets for an estimated 1,400 different farmer vendors, attract from 2,000 to 5,000 customers per day each, and have combined sales of over \$50 million annually. Two markets in the state have sales of over a 5 million dollars per year. This rapid growth in the numbers of Washington farmers markets mirror national trends, where the United States Department of Agriculture lists 1,755 markets in 1994 as compared with 7,175 in 2011 (USDAa, 2012).

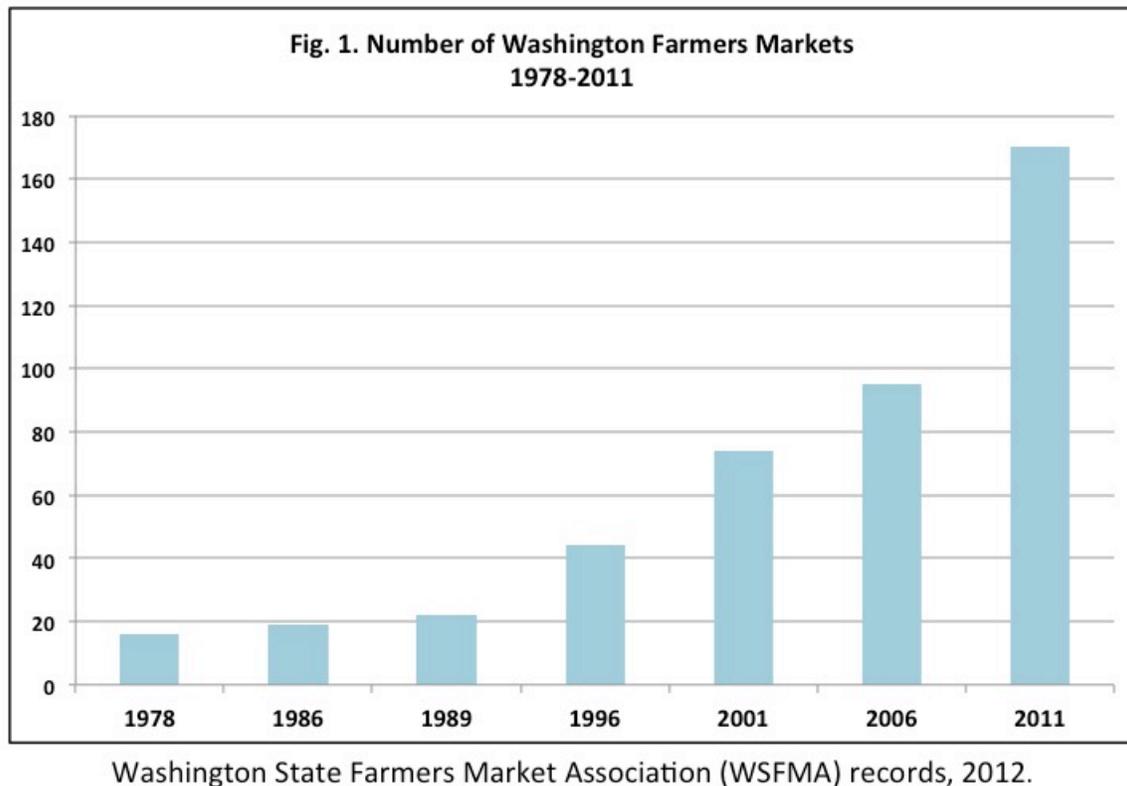


Figure 1. Number of Farmers Markets in WA 1978-2011

As organizations, many farmers markets have a “mission” or social movement component. Three-fourths are organized as non-profits, while 14 percent operate under private business licenses, and another eight percent are supported by government agencies, such as parks and municipalities. Surveys sent out to the managers of all the farmers markets in Washington asked them to describe their organizational structure and share the primary goals of their organization. The highest numbers of responses were evenly split between the goal of supporting farmers (38%) and providing community access to fresh and healthy foods (37%). The next highest response category was to support community economic development, followed by bringing the community together (Ostrom and Donovan 2011). Over 130 markets participate in the Farmers Market Nutrition Program (FMNP), a government program to assist low-income shoppers obtain fresh produce. Clearly farmers are motivated to attend markets to sell products and increase profits. However, when questioned about their motives, they also reported additional goals. Farmers say they value the networking with other farmers, building relationships with their customers, and supporting the larger community-related goals of the markets. For example, research by the Washington State Farmers Market Association (WSFMA) has found that farmers can be passionate “about wanting to make their food available to low income shoppers” and, as a consequence, are willing to comply with the requirements of the government’s Farmers Market Nutrition Program (FMNP) in order to be able to accept payments from low income shoppers. As one farmer expressed, “we work hard to grow great food, and everyone should have access to healthy fresh produce” (WSFMA 2012).

While less common than farmers markets and farm stores, Community Supported Agriculture (CSA) is steadily growing in the Northwest, with 124 documented projects in Washington,

increasing from 80 in 2001. Perhaps the most direct challenge to conventional market relationships, the Community Supported Agriculture (CSA) model asks consumers to share in agricultural risks by paying a farmer in advance to receive a “share” of whatever is harvested from the farm each week. CSA farms in Washington may supply from 5 to 600 weekly farm shares, each designed to serve a family of four. Besides growing, harvesting, and distributing seasonal organic produce, CSA farms usually emphasize agricultural education, volunteerism, and community building. Field days, workdays, harvest festivals and celebrations provide the opportunity for urban families to share and learn together in a rural setting. Hands-on, experiential learning activities for children teach them about how food is grown, providing an early introduction to the land and healthy eating.

While these trends are difficult to quantify, a variety of other creative direct market relationships are evolving between farmers and food cooperatives, independent grocers, health food retailers, restaurants, schools, and cafeterias. The Washington State Department of Agriculture (WSDA 2012) reports that at least 60 farmers were registered to sell products directly to schools. Public schools also appear poised to increase local food buying. Of school districts surveyed in the state, over 90 percent say they are “very or somewhat interested” in purchasing WA grown foods directly from farmers (WSDA 2012). The number of farmers selling products to restaurants is surely far higher. The Seattle area is a national center of culinary innovation for seasonal and local foods. Around 50 chefs in the area belong to the Seattle Chefs Collaborative with a mission of supporting local farmers and sustainable farming practices (SCC, 2012). A number of directories and “farm finder” websites, some with regularly updated fresh sheets, have been developed to help chefs and institutional food buyers source local farm products. Recently, the Seattle Chefs Collaborative developed a “Road Map to a Greener Restaurant” guidebook to assist area chefs and beginning chefs with assessing and improving their local food procurement strategies (UW 2011: 12).

Other innovative collective marketing initiatives under development include a multi-farm CSA collective that serves over 1000 customers, a weekly home delivery service that aggregates organic produce from over 60 farms and delivers weekly shares to 20,000 households, and regional “food hubs” where products from large numbers of small and mid-sized farms can be aggregated, distributed, and collectively marketed to wholesale and specialty buyers. Five such “food hub” projects are under development in the state and 100 have been identified nationally (USDA 2012). Numerous food system assessments have been carried out by local community food organizations in the state and some have resulted in the formation of food policy councils, most notably the Puget Sound Food Policy Council serving the greater Seattle region.

2. Consumer Food Purchasing Behaviors and Perceptions

In 2002, we conducted a telephone survey of a random sample of consumers located throughout Washington State. Eight years later, in the fall of 2010, a similar survey was completed with a different statewide random sample of consumers. Because the respondents to the two surveys were different, a comparison of how particular households changed or did not change their food buying habits and attitudes is not possible. However, a comparison of the two sets of results can offer a useful measure of how food buying trends and attitudes in Washington may have evolved during the past decade.

According to these two surveys, there has been a steady growth in the number of consumers who purchase food directly from farmers at farmers markets, at farm stores and roadside stands, at

You-pick farms, and through CSA. In 2002, 31 percent of respondents said they never purchased directly from farmers, 43 percent said they did so once a month or less, and 26 percent said they did so twice a month or more. In the 2010 survey, the comparable figures were 19 percent who said never, 45 percent said once a month or less, and 36 percent said twice a month or more. The increasingly popularity of direct purchases matches a trend that appears to be unfolding nationally. Respondents in 2010 who never shopped at farmers markets, farm stores, roadside stands or You-pick farms were asked to identify the main reason for not doing so. In both surveys, the most common reason given (32% and 43%) was that there was no market nearby.

In both surveys, a large percentage of respondents expressed a strong interest in buying more local products. Indeed, the percentage of those wishing to buy more of various products stayed remarkably consistent, increasing slowly over time (Table 2), suggesting that the potential for increasing local sales continues unabated.

**TABLE 2. Percentage of Washington Consumers
Interested in Purchasing More:**

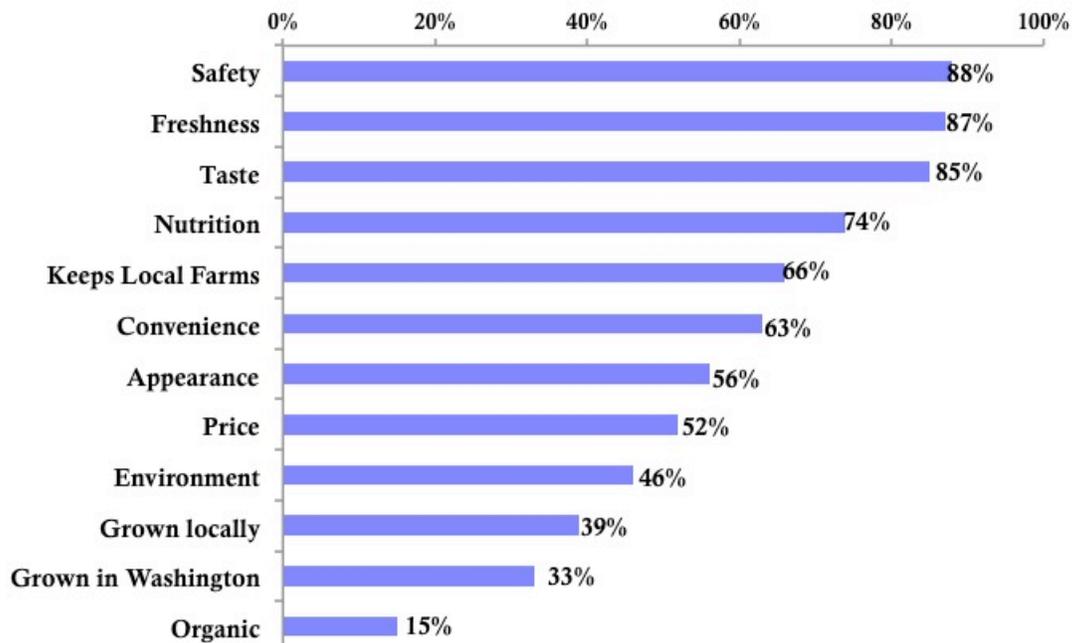
	<u>2002</u>	<u>2010</u>
Vegetables	82%	83%
Fruits	81%	83%
Eggs	52%	60%
Beef	36%	42%
Poultry	34%	40%

Statewide Random Sample Telephone Polls, Ostrom and Jussaume 2002, 2010

At both time periods, Washington consumers were also asked to rate the importance of a variety of food characteristics that they consider when making food purchases. Again, there was a remarkable consistency across the two time periods. Figure 3 suggests that the intrinsic qualities of the food are highly important to consumers, regardless of where they shop.

Fig. 2. Importance of Food Attributes

Percent Rating "Very Important" (N=1027)



Statewide Random Sample Telephone Poll, Ostrom and Jussaume 2010

Figure 2: Importance of Various Food Attributes

Similar to other consumer research results from the U.S. (see Hartman, 2010), Figure 2 shows that consumers are highly concerned with safety, followed closely by the "quality" of the food in terms of freshness, taste, and nutrition. These are primarily self-interested motivations, however, researchers have found that these criteria are interwoven with other ethical values in complex ways. Interestingly, in our research over eight years, both surveys found that the most important "civic" priority associated with food was a strong interest in helping to keep local farmers in business, with 66 percent of respondents feeling that this was very important. If this question is phrased differently, however, to simply ask how important it is for food to be "grown locally," only 39 percent feel it is "very important."

In keeping with other research findings, consumer motivations for food purchasing choices prove to be a complex mixture of self-interest and civic values (Ostrom 2006, 2007; Hartman 2010). While the results reported above come from random sample polls of the general population, these mixed motivations can also be seen among consumers who are already participating in alternative agri-food initiatives. In surveys with CSA participants, the top reasons for joining a CSA farm were listed as obtaining fresh and nutritious produce followed by obtaining local produce and helping small farmers (Ostrom 2007: 109). Interestingly, as shown in Figure 3, when farmers market shoppers were surveyed about their most important reason for being at the market, the top two choices were: "help a local farmer," followed by "healthy food." It might be worth conducting further research to investigate whether farmers market customers are distinct from other consumers in putting the farmer's interest first or whether this is an artifact of a using a different survey method.

**Fig. 3. Primary reason for shopping at a FM?
WA Farmers Market Shoppers (N=4,720)**

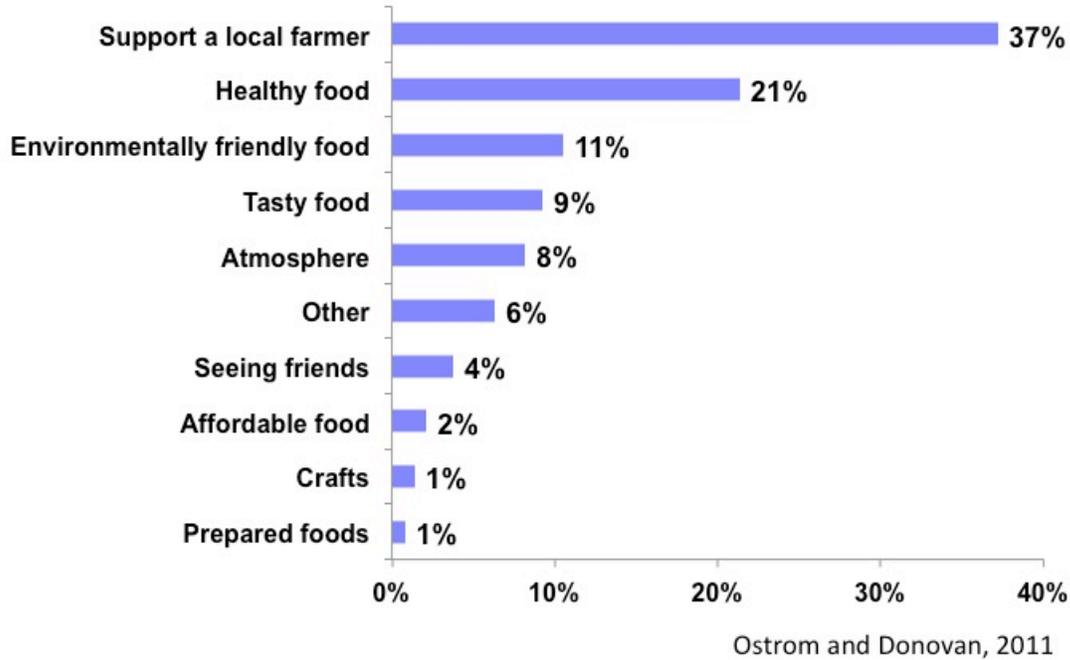


Figure 3: Primary reason for shopping at an FM

In spite of the variety of meanings that consumers associate with local foods (Ostrom 2006), research shows consistency across time in the willingness of consumers to pay more for them (Table 3). However, this willingness to pay has limits. A majority of respondents say that they are agreeable to paying slightly more: 10 percent. Around a fifth would pay 25 percent more. The willingness to pay more falls off quickly after this. Nonetheless, these results reinforce the overall interpretation that consumers in most parts of Washington feel committed to supporting local foods and farmers to at least some degree.

TABLE 3. Percentage of Washington Consumers Willing to Pay More for Local Foods (N=1027)

	<u>2002</u>	<u>2010</u>
Not willing to pay more	23%	20%
Willing to Pay 10% more	54%	55%
Willing to Pay 25% more	21%	22%
Willing to Pay 50% more	2%	3%

Statewide Random Sample Telephone Poll, Ostrom and Jussaume 2010

3. The Movement Value of Alternative Marketing Initiatives

As detailed above, citizens in the Northwest are engaged in alternative agri-food production, distribution, and marketing activities in record numbers. However, the rapid growth of interest and participation in alternative food value chains cannot be assumed to further the ideals of civic agriculture, environmental sustainability, food justice, or democratic control of agri-food systems (Hinrichs 2000, Allen 2007, Ostrom and Jussaume 2007). How should we evaluate these new market forms in terms of their effectiveness as drivers of more sustainable food and farming systems? How do we assess their resilience and independence in the face of powerful mainstream market forces? As Hinrichs (2000) points out, direct marketing practices, while shortening the food supply chain, in and of themselves do not ensure that marketing or production practices are embedded in alternative social or ecological value systems that further sustainability or sovereignty goals. Indeed, as discussed, from the standpoint of the actors, participation in alternative agri-food networks can involve mixed motives, simultaneously furthering both self-interests and civic interests.

Taken altogether, it is important to carefully consider what these new trends mean in terms of progress towards movement goals of more equitable, democratic, and environmentally sustainable agri-food systems. At the farm level, the influence of alternative marketing structures and the incentives they provide to improve farm practices can be difficult to decipher. Data still needs to be collected on the amount of acreage that is under cultivation specifically to supply direct markets and how it is being managed. Certainly markets such as CSA and farmers markets have inspired increased diversity in production systems both within and across farms. As described above, the results of random sample consumer polling do not show the attributes of “organic” or “environmentally friendly” as high-ranking priorities so direct contact with consumers cannot be assumed to have the desired effect of incentivizing improvements to the ecological footprint of farming. On the other hand, random sample surveys of farmers show a statistically significant correlation between farmer participation in direct marketing and organic certification (Ostrom and Jussaume 2007). A direct causal relationship cannot be determined in either direction, however. It seems certain that a strong consumer focus on food safety has resulted in increased organic food purchasing (Hartman 2010). We also know that the organic share of the food market has been steadily climbing since the 1980s with growth as much as 20 percent per year over the last decade in response to strong consumer demand leading to significant price premiums (Hartman 2010). Recent findings from the independent Organic Farming Research Foundation estimate that 2 percent of the U.S. food supply is currently produced using organic methods (OFRF 2012). Washington State has almost 90,000 acres of certified organic cropland managed by 729 producers, numbers that have been increasing each year until the last two years.

Precisely because alternative supply chains function outside of mainstream commodity production and marketing systems by definition, it can be difficult to track the volume or economic value of food supplied through alternative market channels, other than organic foods. However, even with the inclusion of organics (much of which could be considered part of mainstream agriculture), we know that alternative agri-food chains still only supply a tiny fraction of the regional food supply in the Northwest. Given the widespread movement to develop marketing alternatives, the strong consumer interest in local foods, and the strong farmer interest in increasing direct market sales in combination with extremely favorable growing conditions it is logical to question why there has not been far greater expansion of regional food networks in Washington.

Regional food system assessments and research with farmers and consumers suggest a number of substantial barriers that still need to be overcome. Most critical is a serious loss of the

appropriately scaled farming, processing, transportation, distribution, and marketing infrastructure needed for meeting local food demands (Ostrom and Jussaume 2007, UW 2011). This problem is exacerbated by prohibitive food safety and health regulations that drive out processors and marketers with limited financial resources. In Washington, as in other highly productive commodity agricultural regions of the U.S., the existing physical and regulatory infrastructure is designed to support industrial scale, export agriculture (Ostrom 2006, Ostrom and Jussaume 2007). The future expansion of alternative agri-food networks in Washington will depend on their ability to scale up regional food system linkages by addressing these infrastructural and regulatory barriers. Strong organizational groundwork has been established with the many alternative marketing organizations and non-profits that have developed to support them. However, most of these movement organizations are decentralized, disconnected grassroots efforts. It remains to be seen whether struggles to bridge and coalesce the disparate players in local food systems through community food organizations, food policy councils, food hubs, or even government agricultural agencies can succeed in mounting sufficient resources to rebuild the missing infrastructure and address the regulatory barriers to local trade.

Conclusions

While how long it will take to address the structural barriers to scaling up local food production and distribution networks is unclear, it is clear that alternative agri-food movements have succeeded in opening up a new public discourse or conversation about food. Our research with the general public and with participants and organizers of alternative agri-food activities shows that the ways food is framed seem to have been expanded beyond personal health concerns to include both the challenges of farmers and the struggle to build equitable food access. A new dialogue about the politics of food appears to be occurring at local, regional, and national levels. Even as this paper is being written, the national public radio station airing in the next room is featuring a story about “good food” that celebrates an innovative urban organic farming project and an initiative to bring local and organic foods into a school cafeteria setting.

Although it is certainly still true that the control of the mainstream agri-food system resides with highly concentrated, powerful global actors, the alternative initiatives described above have indisputably carved out new intellectual and physical spaces for democratic decision-making and problem solving to occur among local producers and consumers of agricultural goods. Perhaps the success of these evolving alternatives should be analyzed by measures that go beyond the sheer volume or economic value of the food currently supplied to examine the transformative potential of the underlying cultural shifts and evolutions in understanding that may be taking place. An important measure of success for contemporary social movements is their ability to produce and set in motion new sets of meanings, ideas, and ideals that can be taken up by the larger society (Melucci, 1989). Regardless of the outcomes of each struggle to overcome the barriers and challenges to taking charge of local food systems, the first seeds of what local agency might look like have already been planted.

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