LOCALLY-GROWN FOODS STRATEGIC POSITIONING RESEARCH

December 2004

Prepared for:

The Appalachian Sustainable Agricultural Project

729 Haywood Rd., Suite 3
Asheville, NC 28806

Research Inc.
3050 Royal Blvd. South, Ste. 115
Alpharetta, GA 30022
770-619-9837

TABLE OF CONTENTS

INTRODUCTION

In 2000, the Appalachian Sustainable Agriculture Project (ASAP) initiated a campaign to encourage North Carolinians to buy locally-grown food. Prior to commencing the campaign, ASAP engaged a research study to....

- Identify Western North Carolinians usage patterns when shopping for food, which includes meat, fruit, vegetables, dairy products, and poultry.
- Define priorities when purchasing these food items.
- Measure perceptions of places that sell locally home grown foods.
- Determine which of several messages is most likely to motivate consumers to purchase locally-grown food.

In 2004, ASAP would like to measure changes in consumer behavior since the inception of the campaign as well as measure recall of locally-grown food advertising and marketing efforts. This document presents the findings from the 2004 quantitative research study. Findings will be compared with those from the 2000 study.

METHODOLOGY

WHO Consumers responsible for doing most of the grocery shopping for their household. Respondents were at least 18 years of age.

WHAT Telephone interviews. Each interview required from 10 to 12 minutes of a respondent's time.

WHEN Respondents were interviewed during November 2004. In 2000, respondents were interviewed in April and May.

WHERE Buncombe, Madison and Henderson Counties, North Carolina.

WEIGHTING Findings were weighted according to the population in each county.

- Buncombe (66%)
- Henderson (38%)
- Madison (6%)

HOW Research Inc. was responsible for research design, fieldwork, report preparation and presentation. Representatives of ASAP had the opportunity to approve the draft and the anticipated research methodology, suggesting any alterations they felt would enhance the quality of the research

Once the draft was approved, the questionnaire was tested among actual respondents to ensure that wording and question sequence were appropriate and clearly understandable. After pre-testing was completed and the questionnaire had been revised, Research Inc. submitted the tested version of the questionnaire for final approval.

All interviews were conducted from Research Inc.'s central research facility in Greenville, South Carolina. Interviewers were trained to ensure that they understood project specifics.

Findings were analyzed by senior analysts at Research Inc.

HIGHLIGHTS

HIGHLIGHTS

FOOD SHOPPING PATTERNS

- **Asheville area residents are spending a greater percentage of their monthly budget on locally-grown food in 2004 than in 2000.**

    - In 2000, 20% spent more than 10% of their monthly expenditure on locally-grown food, whereas 27% did so in 2004.
    - All ages and income levels show an increased propensity to allocate more money towards purchasing locally produced foods.

- **Their expenditure for food (fruits, vegetables, dairy products, meant and poultry) has risen markedly during the four year period.**

    - In 2000, 41% spent more than $200 on food per month. In 2004, this figure increased significantly to 71%. Note that this increase occurred among all age groups.
    - Monthly food expenditures are higher for residents of Buncombe County than those living in Madison or Henderson Counties.

FOOD PRIORITIES

- **When shopping for food items such as fruit, vegetables, meat, poultry, and dairy, consumers' top priority is freshness.** Almost all (94%) Asheville area residents rated freshness a top priority (a "6" or "7" rating) in 2004. The second priority for consumers is nutritional value, followed by appearance.

    - Indeed, of those who buy locally produced food, 49%, say freshness is the primary reason they purchase locally produced foods. 19% say they purchase locally produced food because they are of better quality.
    - While freshness was the top priority in 2000 as well, consumers place greater importance on nutritional value, appearance, convenient location, and price in 2004 than they did in 2000.
    - Those who allocate more than 10% of their food expenditure per month on locally produced food place higher importance than other consumers on nutritional value. In 2000 they placed less importance than other consumers on nutritional value.

- **More than half (58%) Asheville area consumers do *not* feel that locally-grown food is an important consideration when choosing a restaurant or grocery store.**

HIGHLIGHTS
(CONTINUED)

FOOD VENUES

- **When asked to rate their overall satisfaction with six venues for five attributes, consumers' responses reveal that their satisfaction level with the venues has shifted since 2000.**

  - Notably, satisfaction for all venues which sell food declined for most attributes measured from 2000 to 2004. In particular, grocery stores experienced a marked decline in consumers' perception of freshness, nutritional value, and appearance of food items.

  - In 2004, farmers markets have the best image for three of the five attributes measured. Farmers markets enjoy the best image for:
    - Freshness (94% rated a "6" or "7" for this attribute)
    - Nutritional value (90%)
    - Appearance (73%)

  - Superstores like Sam's Club have the best image for price (65%), while grocery stores have the best image for convenience (72%).

PERCEPTIONS ABOUT LOCALLY-GROWN FOOD

- **Overall, consumers living in Buncombe, Henderson and Madison Counties appear to have a positive attitude towards locally-grown or produced food**. When asked how strongly they believe eight statements about locally-grown food, the majority of consumers indicated that the statements are *very* or *somewhat* believable in 2004. There were no significant changes in the believability of the statements since 2000, with one exception – consumers were significantly more likely to say they believe the statement, *"When you buy locally-grown food, you are helping to preserve the rural character of your region,"* in 2004 than in 2002.

  - Contributes to the local economy (95% stated very or somewhat believable).
  - Supports neighbors (93%).
  - Preserves rural character (90%). (In 2000, only 79% believed this statement.)
  - Tastes better (88%).
  - Safer and healthier (81%).
  - Improves health and personal well-being (76%).
  - Makes statement about providing a better future for children (68%).
  - Saves environment (65%).

HIGHLIGHTS
(CONTINUED)

- **Positively, research findings reveal that all of the statements tested would motivate most consumers to purchase locally produced food.** However, consumers find these statements to be slightly less motivating than they were in 2000.

  - Consumers are most motivated to purchase locally-grown food by the statement, *"Buying locally produced food is a way to improve your personal health and individual well-being."* 92% said the statement would make them more or somewhat more likely to buy locally produced foods.

- **Consumers were asked how strongly they agree or disagree with seven statements about the benefits of locally produced food versus food produced outside the local area.**

  - Similar to 2000, consumers are most likely to agree with the statement, *"Locally produced foods offer higher quality."* 87% of consumers strongly agree or agree somewhat to the statement.

  - Consumers were least likely to agree with the statement *"I would buy more locally produced foods if they were packaged more attractively."* In fact, consumers in all three counties are much less likely to agree with this statement this year than they were in 2000.

THE OPPORTUNITY

- **ASAP should continue to promote the freshness of locally produced food. The organization's campaign should promote the positive effects of buying locally-grown food on the "consumer."**

  - 32% of consumers say that high prices are the top reason they do not buy locally produced foods. This figure is up from 2000, when 18% said that price kept them from purchasing locally produced foods.

  - However, 77% of consumers strongly agree or agree somewhat with the statement, *"When locally produced foods cost a little more, they are worth the extra cost."*

  - Also increasing from 2000 is consumers' perception that locally produced foods are sold at inconvenient locations. 13% listed this as a reason for not buying locally produced foods in 2000, and 17% mentioned this in 2004.

HIGHLIGHTS
(CONTINUED)

- **Positively, over half of consumers (53%) have heard of or seen advertising promoting locally-grown food.**

  - Of those who claim they have seen an advertisement, 30% saw it in a newspaper. 20% saw an advertisement on television, and 12% noticed bumper stickers.

  - Nearly half (45%) say that seeing or hearing advertisements has increased their purchases of locally-grown food. Another 53% say the advertisements have not increased their purchases because they already purchase what they need.

- **ASAP has opportunity to improve awareness and usage of the publication, the *Local Food Guide*.**

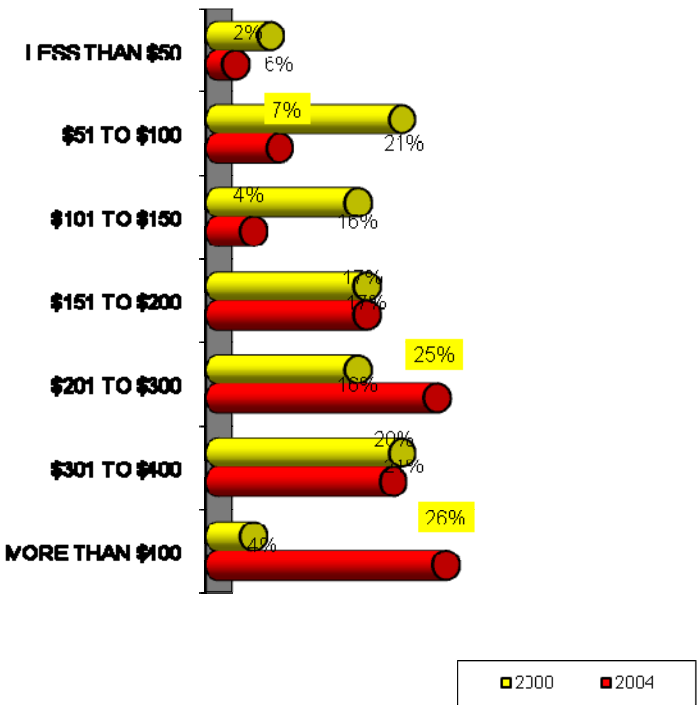
  - Most (87%) Asheville area residents are not aware of the *Local Food Guide*.

  - Of those who have heard of the *Local Food Guide*, less than half (42%) use it to find local food or farms. Most (94%) have *not* used the web version of the *Local Food Guide*.

USAGE PATTERNS

MONTHLY FOOD EXPENDITURES[1]

In 2004, the majority of Asheville residents (71%) spend more than $200 per month on food. One-fourth (26%) of all consumers say they spend more than $400 per month.



In 2004, the average monthly food expenditure is higher for Buncombe County residents than Madison or Henderson County residents.

			COUNTY					
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
LESS THAN $50	6	2	6	1	6	1	4	3
$51 TO $100	21	7	19	6	18	5	26	9
$101 TO $150	16	4	18	2	11	9	11	8
$151 TO $200	17	17	17	18	21	18	16	13
$201 TO $300	16	25	15	25	20	26	18	25
$301 TO $400	21	20	23	20	19	16	18	19
MORE THAN $400	4	26	3	27	5	25	7	23

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[1] *"Generally, how much do you spend on food each month?"*

MONTHLY FOOD EXPENDITURES[2]
(CONTINUED)

In general, the older the consumer the less he or she spends on food items. However, food expenditure among consumers age 55 or older increased markedly from 2000 to 2004. In 2000, only 1% claimed they spent over $400 per month on food, whereas in 2004 20% of consumers age 55 and older made that same claim.

AGE			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
LESS THAN $50	6	2	5	2	4	7	7	4
$51 TO $100	21	7	13	2	12	6	26	13
$101 TO $150	16	4	5	5	11	5	17	11
$151 TO $200	17	17	29	14	14	16	17	20
$201 TO $300	16	25	18	36	15	23	18	20
$301 TO $400	21	20	24	21	33	20	13	12
MORE THAN $400	4	26	5	21	12	29	1	20

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

Nearly four in ten (36%) consumers with household income of $50,000 or more claim they spend $400 or more on food items each month. In fact, consumers of all income levels are much more likely in 2004 to spend more than $400 per month on food than they were in 2000.

INCOME			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
LESS THAN $50	6	2	10	-	1	2	3	1
$51 TO $100	21	7	28	23	19	3	3	2
$101 TO $150	16	4	18	14	14	5	6	5
$151 TO $200	17	17	17	20	20	19	16	9
$201 TO $300	16	25	14	14	17	30	28	24
$301 TO $400	21	20	14	14	23	16	38	23
MORE THAN $400	4	26	-	14	5	25	6	36

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

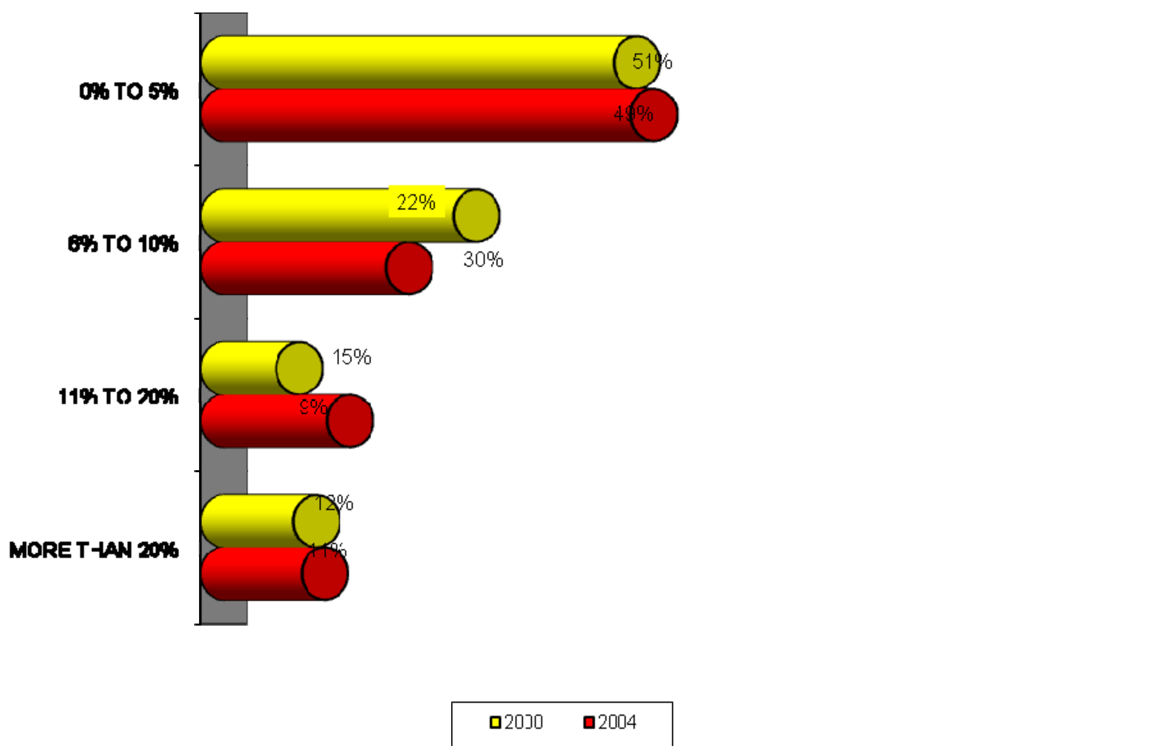
---

2 *"Generally, how much do you spend on food each month?"*

PERCENTAGE OF FOOD EXPENDITURE SPENT ON LOCALLY-GROWN FOOD[3]

Similar to 2000, half (51%) of all Asheville area consumers spend 5% or less of their food expenditure on locally-grown food in 2004.

However, among those who spend more than 5% on locally-grown food, their expenditures have increased. In 2000, 21% of all consumers spent more than 10% of their total food bill on locally-grown food. By 2004, 27% spent more than 10% on locally-grown food.



Among the three counties measured, Henderson County residents appear to spend the most on locally-grown foods. In 2004, Madison County experiences the greatest gain in expenditure on locally-grown food.

	COUNTY							
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
0% TO 5%	49	51	45	49	64	54	55	56
6% TO 10%	30	22	32	24	21	25	29	17
11% TO 20%	9	15	11	17	10	8	6	12
MORE THAN 20%	11	12	12	10	5	13	10	15

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[3] *"About what percent of your monthly food bill is spent on locally grown foods?"*

PERCENTAGE OF FOOD EXPENDITURE SPENT ON LOCALLY-GROWN FOOD[4]

(CONTINUED)

In 2004, consumers age 55 or older are twice as likely to spend more than 10% on locally-grown food than they were in 2000.

AGE								
			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
0% TO 5%	49	51	43	50	57	53	59	56
6% TO 10%	30	22	31	25	26	24	25	14
11% TO 20%	9	15	14	8	10	15	5	10
MORE THAN 20%	11	12	11	17	7	8	10	20

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

Expenditure on locally-grown food increases with income. Indeed, consumers with annual household income higher than $50,000 are most likely to claim they allocate more than 10% of their food budget towards purchasing locally-grown food.

Interestingly, expenditure on locally-grown food among consumers with household income less than $25,000 increased during the past four years.

INCOME								
			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
0% TO 5%	49	51	64	37	50	64	56	42
6% TO 10%	30	22	17	33	36	15	28	26
11% TO 20%	9	15	9	7	8	9	12	20
MORE THAN 20%	11	12	9	22	7	13	4	12

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

4 *"About what percent of your monthly food bill is spent on locally grown foods?"*

FOOD SHOPPER PROFILE

The following two pages present a profile of Asheville area residents by the percentage of their monthly food bill spent on locally produced food in 2004.

PERCENTAGE OF MONTHLY FOOD BILL SPENT ON LOCALLY PRODUCED FOOD					
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	0% TO 5% (121) %	6% TO 10% (50) %	11%+ (57) %
FOOD EXPENDITURES					
LESS THAN $50	6	2	3	-	2
$51 TO $100	21	7	9	4	9
$101 TO $150	16	4	4	2	6
$151 TO $200	17	17	21	14	11
$201 TO $300	16	25	26	22	26
$301 TO $400	21	20	19	24	19
MORE THAN $400	4	26	18	33	28
AGE					
18 TO 34	13	20	20	24	21
35 TO 44	14	25	21	27	21
45 TO 54	17	26	32	33	26
55 TO 64	21	11	12	6	16
65 OR OLDER	35	18	14	10	16
INCOME					
LESS THAN $14,999	11	7	8	6	10
$15,000 TO $24,999	24	9	5	20	10
$25,000 TO $34,999	28	10	22	3	10
$35,000 TO $49,999	21	17	26	20	19
$50,000 TO $75,000	N/A	30	23	31	33
$75,001 TO $100,000	N/A	18	12	11	17
MORE THAN $100,000	N/A	8	4	9	2
EDUCATION					
NO HIGH SCHOOL DEGREE	3	5	10	4	5
HIGH SCHOOL GRAD	13	20	22	24	16
SOME COLLEGE	18	21	25	24	21
COLLEGE GRADUATE	22	37	34	31	32
POST GRADUATE WORK	6	16	8	10	23
SEX					
MALE	19	21	23	30	19
FEMALE	81	79	77	70	81

Blue indicates significant difference from total study at 95% confidence interval. Yellow indicates significant difference from previous year at the 95% confidence interval.

FOOD SHOPPER PROFILE

PERCENTAGE OF MONTHLY FOOD BILL SPENT ON LOCALLY PRODUCED FOOD	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	0% TO 5% (121) %	6% TO 10% (50) %	11%+ (57) %
MAJORITY OF NEWS					
TELEVISION	70	51	61	57	33
NEWSPAPERS	23	31	23	31	39
RADIO	6	18	16	12	28
RACE					
WHITE	N/A	97	98	96	96
ASIAN AMERICAN	N/A	2	2	2	-
AFRICAN AMERICAN	N/A	1	-	2	-
HISPANIC	N/A	1	-	-	4
FAVORITE LOCAL RADIO STATION (TOP TEN)					
WNCW 88.7 FM	4	18	5	12	28
WKSF 99.9 FM	16	15	20	21	24
WCQS 88.1 FM	12	11	11	2	6
WWNC 570 AM	31	9	7	7	6
WMIT 106.9 FM	13	7	10	10	6
96.5 FM	-	6	7	12	6
WHKP	6	4	7	2	4
102.5 FM	-	4	5	5	-
WFBC 93.7	-	3	1	7	2
104.9 FM	-	2	1	-	4
NEWSPAPERS READ REGULARLY					
ASHEVILLE CITIZENS TIMES	72	62	53	60	51
HENDERSON TIMES NEWS	23	17	21	12	32
MOUNTAIN XPRESS	1	7	2	12	7
NEWS RECORD	0	3	8	8	9
USA TODAY	-	2	1	-	4
OTHER	3	2	4	4	4
DON'T KNOW	-	19	19	20	19

Blue shading indicates a significant difference from total study at the 95% confidence interval.
Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

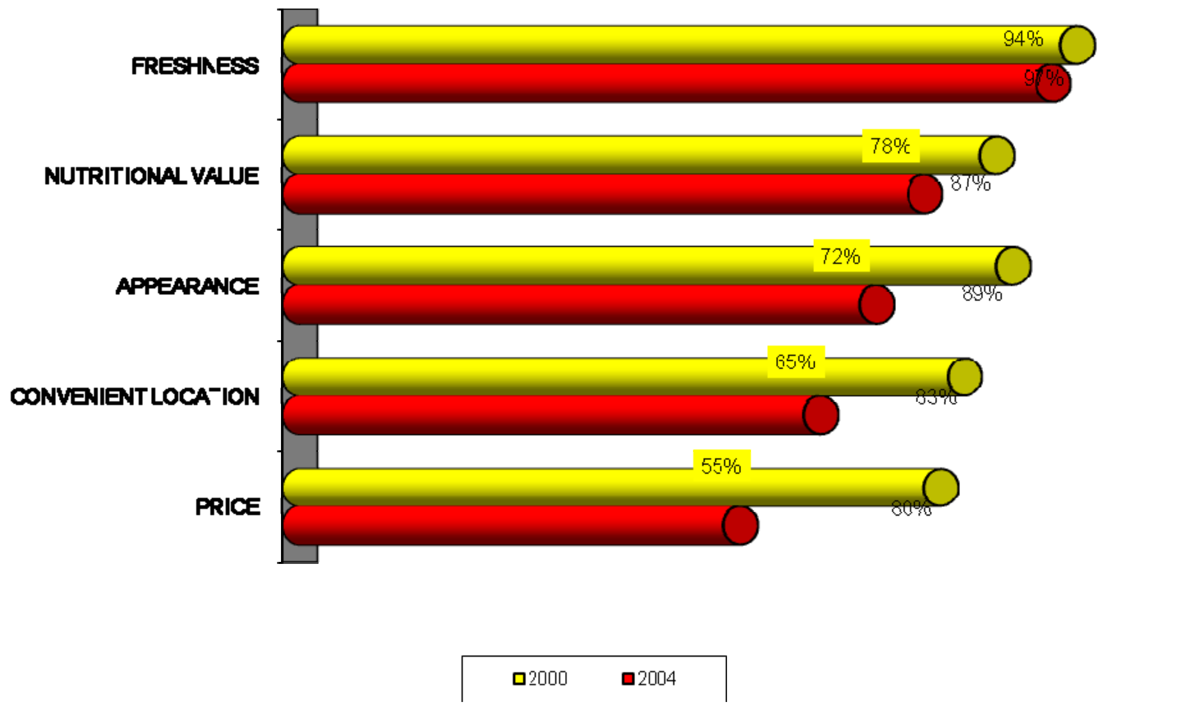
PRIORITIES

PRIORITIES[5]

% RATING A "6" OR "7"

Asheville area consumers were asked to use a "1" to "7" scale to rate the importance of five factors when shopping for food items such as fruit, vegetables, dairy, meat and poultry. Their responses reveal that freshness continues to be consumers' top priority followed by nutritional value and appearance.

Interestingly, consumers place less importance on nutritional value, food appearance, convenience and price when shopping for food in 2004 than in 2000.



Food priorities do not vary significantly among residents of Buncombe, Madison, and Henderson Counties. However, when measured against priorities in 2000, Asheville area residents place less importance on all attributes except freshness. This finding is most prevalent among Buncombe and Henderson County residents.

	COUNTY							
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
FRESHNESS	97	94	96	94	98	94	99	95
NUTRITIONAL VALUE	87	78	85	78	85	80	91	79
APPEARANCE	89	72	87	69	87	77	93	79
CONVENIENT LOCATION	83	65	81	62	87	75	88	72
PRICE	80	55	78	48	76	65	85	69

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

5 *"Please use a '1`' to '7' scale to rate the importance of several factors when shopping for food."*

PRIORITIES[6]

% RATING A "6" OR "7"
(CONTINUED)

Consumers who allocate more than 10% of their total food expenditure towards locally-grown food are more likely to say that nutritional value is a top priority when shopping for food than those who allocate less towards locally-grown food. They are also much less likely than those who spend a smaller portion of their budget on locally-grown food to consider price a top priority when shopping for food.

% SPENT ON LOCALLY-GROWN FOOD								
			0% TO 5%		6% TO 10%		11%+	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (123) %	2004 (116) %	2000 (60) %	2004 (49) %	2000 (40) %	2004 (54) %
FRESHNESS	97	94	99	94	100	96	100	98
NUTRITIONAL VALUE	87	78	86	78	92	80	76	88
APPEARANCE	89	72	89	77	92	72	76	75
CONVENIENT LOCATION	83	65	86	73	73	60	74	66
PRICE	80	55	86	60	79	70	67	54

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[6] *"Please use a '1`' to '7' scale to rate the importance of several factors when shopping for food."*

PRIORITIES[7]

% RATING A "6" OR "7"
(CONTINUED)

In 2004, consumers age 35 to 54 are much less likely to place a strong emphasis on nutritional value, price, appearance, and convenience when shopping for locally-grown food than in 2000.

AGE								
			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
FRESHNESS	97	94	100	97	98	92	97	97
NUTRITIONAL VALUE	87	78	84	75	91	79	85	83
APPEARANCE	89	72	76	71	88	72	92	83
CONVENIENT LOCATION	83	65	74	66	86	69	87	72
PRICE	80	55	76	61	83	60	78	62

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

Consumers with annual household income between above $25,000 and $49,999 are much less concerned about food appearance, convenience, and price when purchasing food than consumers in the same income range in 2000.

.

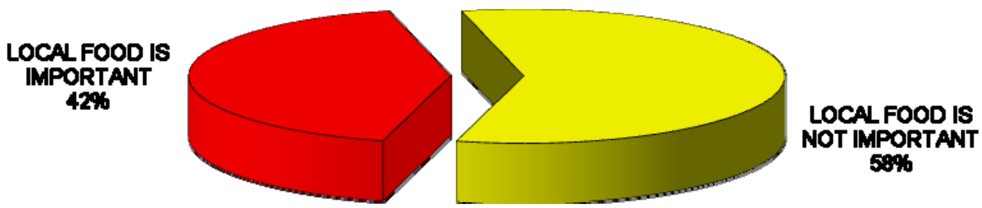
INCOME								
			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
FRESHNESS	97	94	97	94	99	93	97	92
NUTRITIONAL VALUE	87	78	92	72	86	84	84	75
APPEARANCE	89	72	89	78	89	73	75	68
CONVENIENT LOCATION	83	65	85	69	86	68	78	66
PRICE	80	55	85	69	85	55	63	51

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[7] *"Please use a '1`' to '7' scale to rate the importance of several factors when shopping for food."*

PRIORITIES[8]
(CONTINUED)

More than half (58%) of all consumers do not feel that local food is an important consideration in deciding which restaurant or grocery store to patronize.



8 *"Please use a '1`' to '7' scale to rate the importance of several factors when shopping for food."*

SATISFACTION WITH VENUES

Asheville area consumers were asked to use a “1” to “7” scale to indicate their overall satisfaction with six venues for the five attributes measured. Findings reveal that …

- Farmers’ markets enjoy the best image among the venues tested for freshness, nutritional value, and food appearance in 2004. In 2000, they had the best image for freshness and nutritional value.
- Superstores have the best price image in 2004. In 2000, food co-ops and food clubs had the best price image.
- Similar to 2000, grocery stores have the best image for convenience.

	VENUE											
	GROCERY STORES		SUPERST-ORE/SAMS		FARMERS’ MARKETS		ROADSIDE STANDS		FOOD CO-OPS.		FOOD CLUBS	
	2000 %	2004 %	2000 %	2004 %	2000 %	2004 %	2000 %	2004 %	2000 %	2004 %	2000 %	2004 %
FRESHNESS	83	66	79	53	92	94	84	83	73	89	76	66
NUTRITIONAL VALUE	80	68	71	57	87	90	82	84	75	80	72	68
PRICE	66	44	69	65	69	54	68	51	70	38	70	49
APPEARANCE	83	64	83	59	78	73	69	64	76	67	78	54
CONVENIENT LOCATION	85	72	65	35	51	36	58	32	35	36	35	27

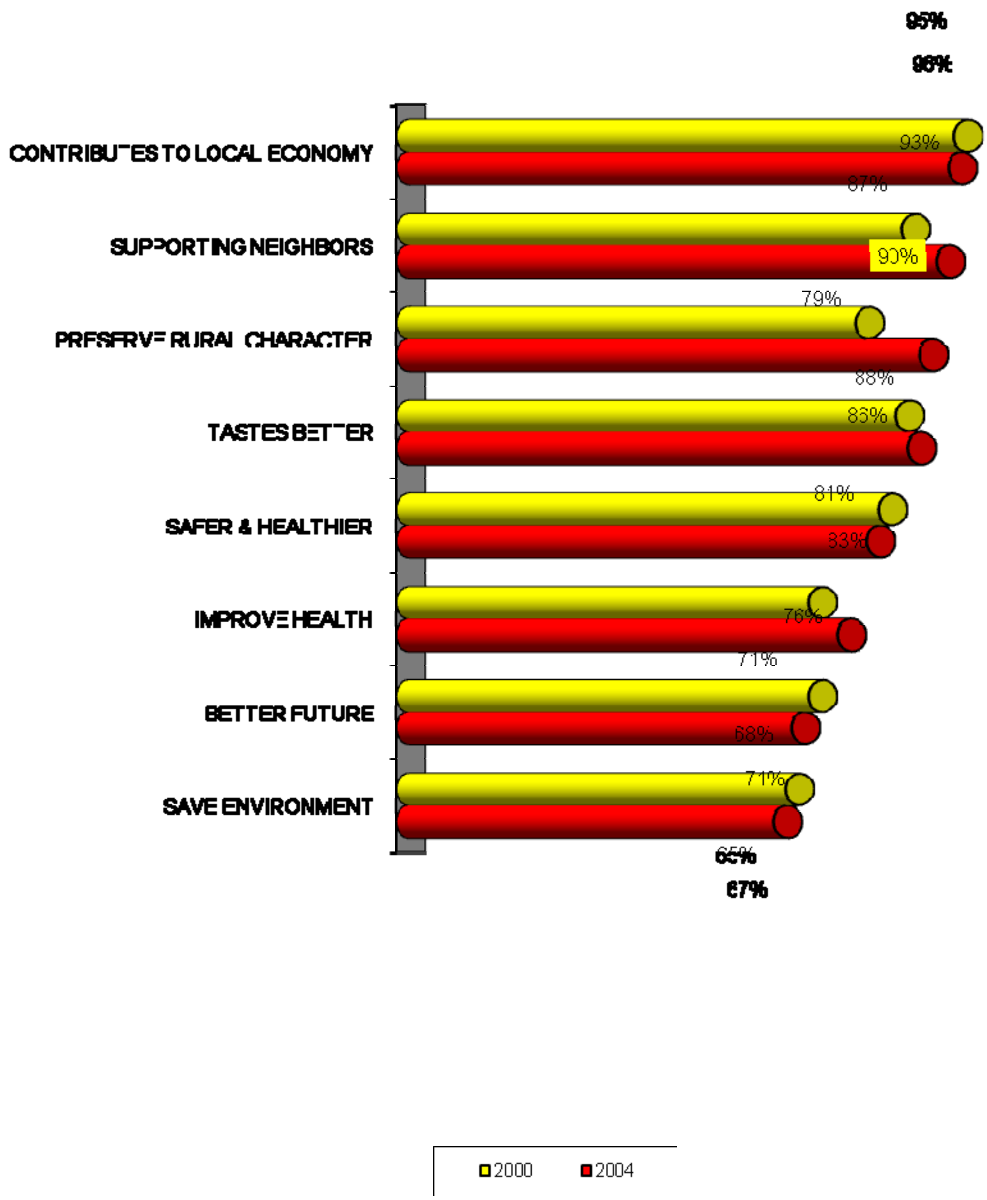
Blue shading indicates the highest score among all venues for each attribute measured in 2000.
Yellow shading indicates the highest score among all venues for each attribute measured in 2004.

LOCALLY-GROWN FOOD PERCEPTIONS

STATEMENTS ON BELIEVABILITY[9]

% VERY OR SOMEWHAT BELIEVABLE

Consumers were asked how strongly they believe eight statements about locally-grown foods. Similar to 2000, almost all (96%) consumers believe the statement, *"Buying locally-grown foods contributes to the economy."* Consumers are much more likely to believe that buying locally-grown food helps preserve the rural character of their region in 2004 than in 2000.



9 *"For each statement I read, please tell me how believable the statement is to you."*

STATEMENTS ON BELIEVABILITY[10]

(CONTINUED)

This table presents *all* consumers' responses when rating the believability of each statement in 2004.

2004					
	VERY BELIEVABLE	SOMEWHAT BELIEVEABLE	NOT VERY BELIEVABLE	NOT AT ALL BELIEVABLE	DON'T KNOW
When you buy locally-grown food, you are supporting your neighbors.	70	23	2	2	2
Buying locally-grown food greatly contributes to the local economy.	66	29	2	2	2
When you buy locally-grown food, you are helping to preserve the rural character of your region.	62	28	7	1	2
Locally-grown food usually tastes better.	58	30	8	2	3
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	44	24	21	6	5
Buying locally produced foods is a way to improve your personal health & individual well-being.	42	34	16	5	3
Locally-grown foods are safer & healthier for your family.	39	42	14	4	1
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	31	34	22	7	6

10 *"For each statement I read, please tell me how believable the statement is to you."*

STATEMENTS ON BELIEVABILITY[11]

% VERY OR SOMEWHAT BELIEVABLE
(CONTINUED)

In 2004, Buncombe County residents are more likely to believe that buying locally-grown food preserves the rural character of their region than in 2000.

	COUNTY							
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
Buying locally-grown food greatly contributes to the local economy.	96	95	95	94	93	94	97	95
When you buy locally-grown food, you are supporting your neighbors.	87	93	87	94	94	91	87	93
When you buy locally-grown food, you are helping to preserve the rural character of your region.	79	90	75	90	84	87	86	91
Locally-grown food usually tastes better.	86	88	83	88	87	89	94	86
Locally-grown foods are safer & healthier for your family.	83	81	91	81	85	85	85	80
Buying locally produced foods is a way to improve your personal health & individual well-being.	71	76	69	73	76	79	74	84
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	71	68	68	62	81	83	75	79
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	67	65	65	64	70	69	72	68

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

11 *"For each statement I read, please tell me how believable the statement is to you."*

STATEMENTS ON BELIEVABILITY[12]

% VERY OR SOMEWHAT BELIEVABLE
(CONTINUED)

Consumers younger than 35 are more likely than older consumers to believe the statements listed below. They are also more likely to believe these statements now compared with four years ago.

- *"Buying locally-grown food greatly contributes to the local economy."*
- *"Locally-grown foods are safer and healthier for your family."*
- *"When you buy locally-grown food, you are helping to preserve the rural character of your region."*
- *"Buying locally-grown food is a way for you to make a statement about making the future better for today's children."*
- *"Buying locally-grown foods is a way to improve your personal health and individual well-being."*
- *"When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices."*

			AGE					
			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
Buying locally-grown food greatly contributes to the local economy.	96	94	95	97	95	96	94	88
When you buy locally-grown food, you are supporting your neighbors.	87	94	87	90	88	97	90	86
When you buy locally-grown food, you are helping to preserve the rural character of your region.	79	90	74	93	85	87	82	89
Locally-grown food usually tastes better.	86	87	77	83	90	89	89	88
Locally-grown foods are safer & healthier for your family.	83	81	69	90	87	82	87	76
Buying locally produced foods is a way to improve your personal health & individual well-being.	71	77	47	80	77	77	77	81
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	71	68	60	80	83	74	72	73
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	67	65	53	82	74	64	69	63

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[12] *"For each statement I read, please tell me how believable the statement is to you."*

STATEMENTS ON BELIEVABILITY[13]

% VERY OR SOMEWHAT BELIEVABLE
(CONTINUED)

Consumers with annual household income of $50,000 or more are more likely to believe the statement, *"When you buy locally-grown food, you are supporting your neighbors,"* than less affluent consumers.

			INCOME					
			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
Buying locally-grown food greatly contributes to the local economy.	96	94	94	91	97	94	100	99
When you buy locally-grown food, you are supporting your neighbors.	87	94	94	83	90	93	97	100
When you buy locally-grown food, you are helping to preserve the rural character of your region.	79	90	84	91	83	92	85	94
Locally-grown food usually tastes better.	86	87	91	85	88	83	88	91
Locally-grown foods are safer & healthier for your family.	83	81	87	86	85	85	82	84
Buying locally produced foods is a way to improve your personal health & individual well-being.	71	77	83	75	74	75	75	80
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	71	68	79	75	78	78	78	78
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	67	65	86	67	69	64	53	69

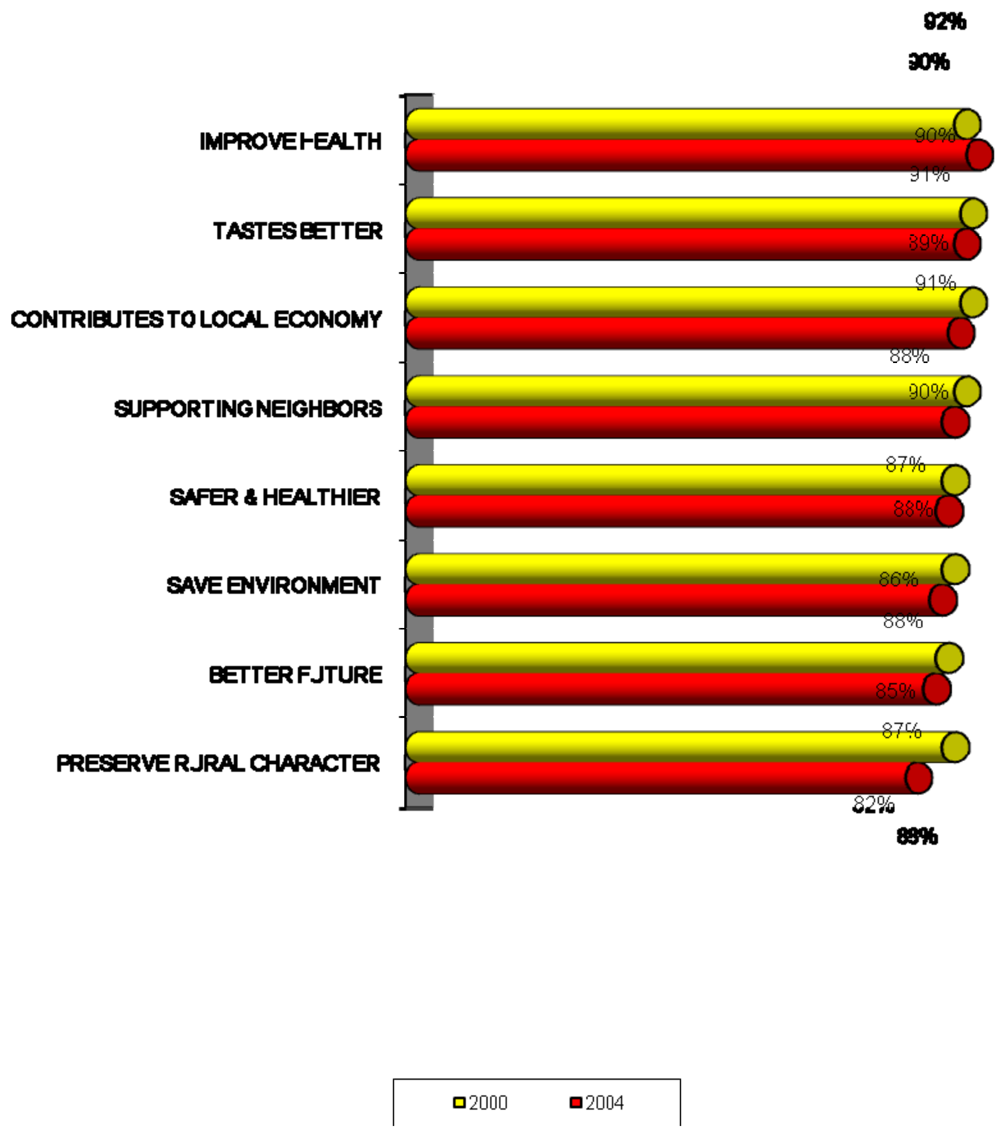
Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

13 *"For each statement I read, please tell me how believable the statement is to you."*

LIKELIHOOD OF PURCHASE[14]

% MORE OR SOMEWHAT MORE LIKELY TO BUY

Consumers were also asked if each of the eight statements would make them more likely to buy, somewhat more likely to buy or have no effect on their purchases of locally-grown food. Their responses reveal that these statements, if believed to be true, would motivate most consumers to purchase locally-grown food. However, consumers indicate that they are slightly less likely to be motivated by all of these statements, with the exception of the statement referencing health improvement, in 2004 than they were in



2000. 2000.

[14] *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[15]
(CONTINUED)

This table presents *all* consumers' responses when indicating whether each statement would motivate them to purchase locally-grown food.

2004				
	MUCH MORE LIKELY TO BUY	SOMEWHAT MORE LIKELY TO BUY	NO EFFECT	DON'T KNOW
Locally-grown food usually tastes better.	68	22	9	2
Buying locally-grown food greatly contributes to the local economy.	61	28	11	1
Buying locally produced foods is a way to improve your personal health & individual well-being.	60	32	6	1
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	60	25	13	2
Locally-grown foods are safer & healthier for your family.	58	29	11	2
When you buy locally-grown food, you are supporting your neighbors.	57	31	11	1
When you buy locally-grown food, you are helping to preserve the rural character of your region.	55	27	16	2
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	53	33	13	2

15 *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[16]

% MORE OR SOMEWHAT MORE LIKELY TO BUY
(CONTINUED)

In general, the statements about locally-grown food are more likely to motivate Madison County residents than residents of Buncombe and Henderson Counties. This contrasts with 2000, when Buncombe County residents were most likely to be motivated by the statements.

Consumers in all three counties are more motivated by the statement "When you buy locally-grown food you are helping to preserve the rural character of the region" than in 2004.

	COUNTY							
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
Buying locally produced foods is a way to improve your personal health & individual well-being.	90	92	96	93	86	91	79	92
Locally-grown food usually tastes better.	91	90	96	91	87	95	80	85
Buying locally-grown food greatly contributes to the local economy.	91	89	95	89	82	88	80	88
When you buy locally-grown food, you are supporting your neighbors.	90	88	96	87	88	93	79	89
Locally-grown foods are safer & healthier for your family.	88	87	93	86	84	93	80	86
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	88	86	96	86	86	93	75	82
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	87	85	94	86	84	91	74	81
When you buy locally-grown food, you are helping to preserve the rural character of your region.	88	82	95	81	80	92	76	84

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

16 *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[17]

% MORE OR SOMEWHAT MORE LIKELY TO BUY
(CONTINUED)

In general, there are no significant differences in likelihood of purchase of locally-grown food among the various age groups from 2000 to 2004.

			AGE					
			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
Buying locally produced foods is a way to improve your personal health & individual well-being.	90	92	84	94	88	89	86	96
Locally-grown food usually tastes better.	91	90	97	94	89	87	86	93
Buying locally-grown food greatly contributes to the local economy.	91	89	94	85	85	90	84	89
When you buy locally-grown food, you are supporting your neighbors.	90	88	97	88	89	89	84	91
Locally-grown foods are safer & healthier for your family.	88	87	89	87	86	89	86	88
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	88	86	95	86	86	87	82	89
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	87	85	87	90	86	87	81	81
When you buy locally-grown food, you are helping to preserve the rural character of your region.	88	82	85	87	83	86	83	84

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

17 *"For each statement, please tell me if the statement would make you …."*

LIKELIHOOD OF PURCHASE[18]

% MORE OR SOMEWHAT MORE LIKELY TO BUY
(CONTINUED)

Across the board, the statements are less likely to motivate consumers with annual household income of $50,000 or more to purchase locally-grown food in 2004 than in 2000.

			INCOME					
			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
Buying locally produced foods is a way to improve your personal health & individual well-being.	90	92	83	89	79	94	96	89
Locally-grown food usually tastes better.	91	90	82	91	83	94	96	86
Buying locally-grown food greatly contributes to the local economy.	91	89	80	84	81	88	97	88
When you buy locally-grown food, you are supporting your neighbors.	90	88	84	96	83	85	96	88
Locally-grown foods are safer & healthier for your family.	88	87	82	78	77	95	96	84
When you buy locally-grown foods, you are helping to save the environment because local farmers use environmentally safer agricultural practices.	88	86	80	92	80	83	94	81
Buying locally-grown food is a way for you to make a statement about making the future better for today's children.	87	85	80	93	76	81	96	83
When you buy locally-grown food, you are helping to preserve the rural character of your region.	88	82	79	91	77	79	93	83

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

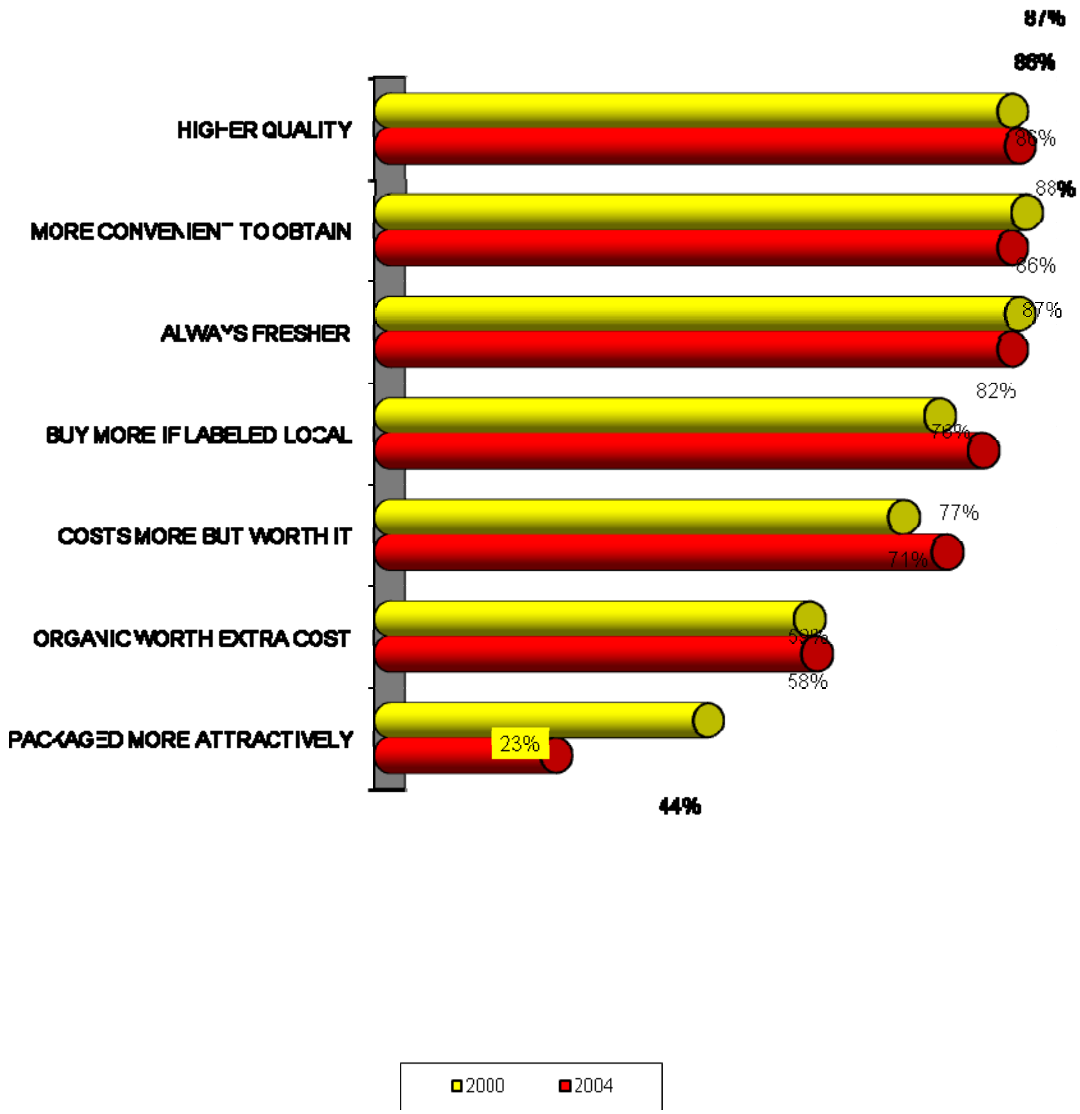
18 *"For each statement, please tell me if the statement would make you …."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[19]

% STRONGLY OR SOMEWHAT AGREE

Consumers were asked how strongly they agree or disagree with seven statements about the benefits of locally-grown food versus food produced outside the local area. Their responses reveal that nine in ten (88%) consumers strongly or somewhat agree with the statement, *"Locally produced foods offer higher quality."*

In 2000, nearly half (44%) agreed that they would buy more locally produced foods if they were packaged more attractively. In 2004, this percentage dropped significantly to 23%.



19 *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[20]

% STRONGLY OR SOMEWHAT AGREE
(CONTINUED)

Madison County residents are more likely to agree that organic foods are worth the extra cost in 2004 than in 2000.

			COUNTY					
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
Locally produced foods offer higher quality.	86	87	86	88	85	86	87	84
I would buy more locally produced foods if they were more convenient to obtain.	88	86	88	86	91	87	88	84
Locally produced foods are always fresher.	87	86	88	91	85	86	84	74
I would buy more locally produced foods if they were labeled as local.	76	82	76	84	74	81	75	77
When locally produced foods cost a little more, they are worth the extra cost.	71	77	68	77	82	81	76	77
When locally produced organic foods cost more than other locally produced foods, they are worth the extra cost.	58	59	62	60	41	63	51	56
I would buy more locally-grown foods if they were packaged more attractively.	44	23	46	24	46	33	39	20

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[20] *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[21]

% STRONGLY OR SOMEWHAT AGREE
(CONTINUED)

Interestingly, all age groups are much more likely to agree with the statement *"Locally produced foods offer higher quality"* in 2004 than in 2000.

In general, consumers 55 and older are much less likely this year than they were in 2000 to agree with all statements except *"Locally produced foods offer higher quality."*

AGE								
			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
Locally produced foods offer higher quality.	86	87	50	83	56	89	54	83
I would buy more locally produced foods if they were more convenient to obtain.	88	86	92	86	95	87	86	82
Locally produced foods are always fresher.	87	86	76	83	88	89	86	76
I would buy more locally produced foods if they were labeled as local.	76	82	73	75	71	83	78	75
When locally produced foods cost a little more, they are worth the extra cost.	71	77	71	83	72	81	77	76
When locally produced organic foods cost more than other locally produced foods, they are worth the extra cost.	58	59	51	74	53	52	74	45
I would buy more locally-grown foods if they were packaged more attractively.	44	23	40	34	31	21	49	27

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

21 *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

LOCALLY PRODUCED FOOD VS. FOOD PRODUCED OUTSIDE THE LOCAL AREA[22]

% STRONGLY OR SOMEWHAT AGREE
(CONTINUED)

In 2004, consumers with annual household income less than $25,000 are more likely to agree with nearly all statements regarding locally produced foods than they were in 2000.

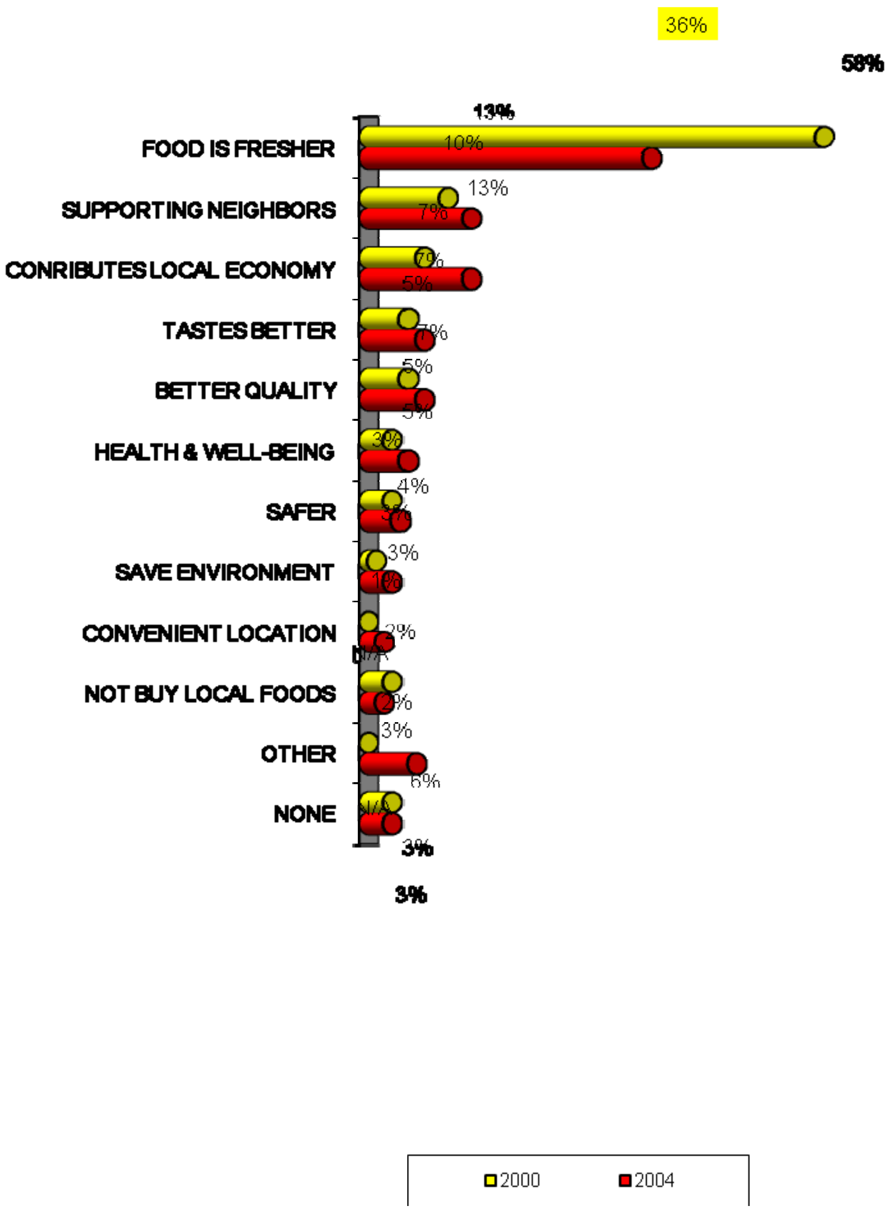
			INCOME					
			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
Locally produced foods offer higher quality	86	87	57	96	59	85	56	88
I would buy more locally produced foods if they were more convenient to obtain	88	86	88	91	93	77	94	89
Locally produced foods are always fresher	87	86	87	84	86	81	87	91
I would buy more locally produced foods if they were labeled as local	76	82	75	89	80	79	81	83
When locally produced foods cost a little more, they are worth the extra cost.	71	77	80	92	80	73	69	86
When locally produced organic foods cost more than other locally produced foods they are worth the extra cost	58	59	63	91	61	61	60	62
I would buy more locally-grown foods if they were packaged more attractively	44	23	53	78	42	24	41	23

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[22] *"For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly agree with the statement."*

TOP REASON FOR BUYING LOCALLY PRODUCED FOOD[23]

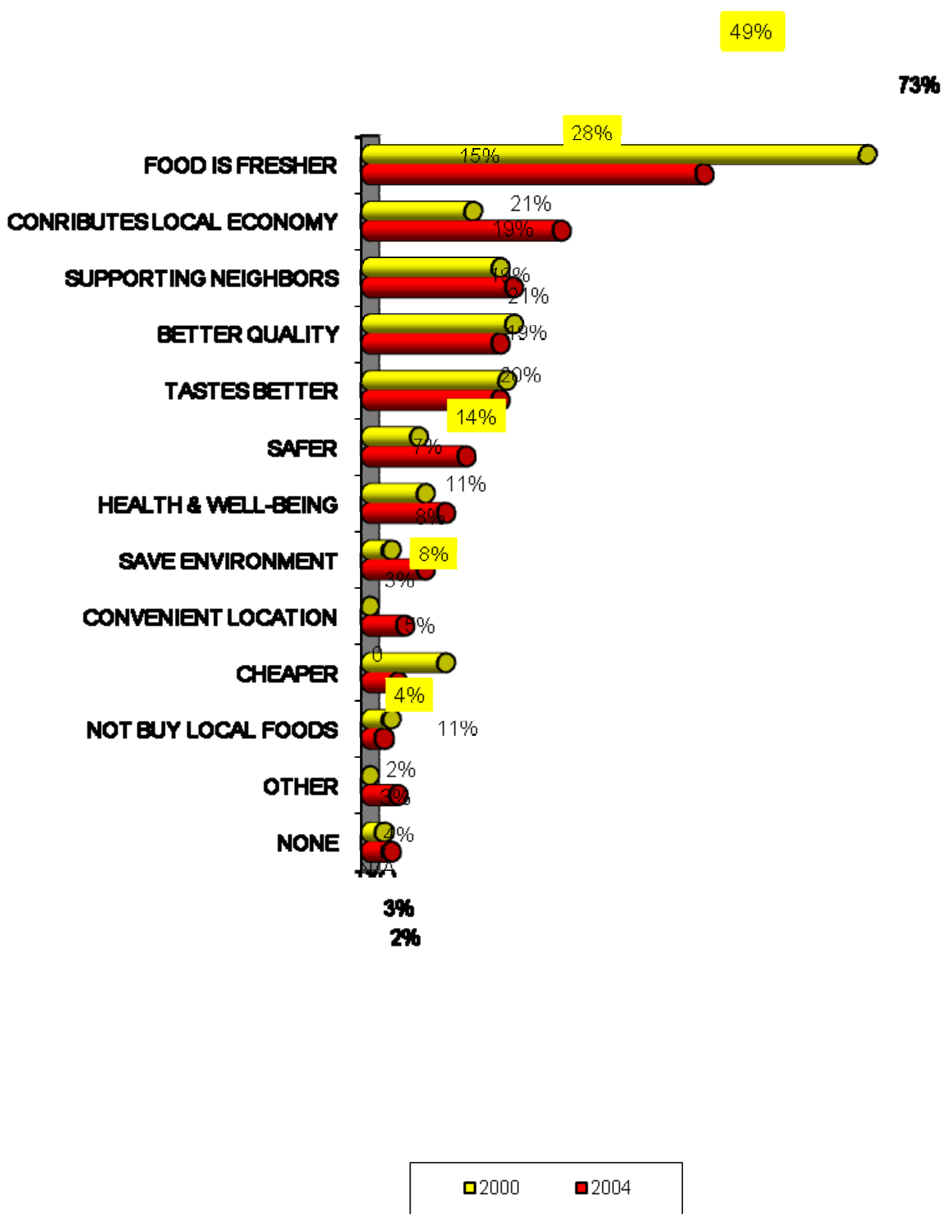
Freshness continues to be the #1 reason consumers would consider buying locally produced food in 2004, although it is a much less compelling reason when compared to 2000. When asked what would be the one most important reason they would buy locally produced food, 36% of all consumers mentioned freshness. Support for neighbors and contribution to the local economy (13%) rank a distant second.



[23] *"Could you please tell me the one most important reason why you would buy locally produced food?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[24]

When asked to name *all* the reasons they might buy locally produced food, five in ten (49%) consumers mentioned freshness. Consumers also mentioned contribution to the local economy (28%), supporting neighbors (21%), and tastes better (19%). Again, note the decline from 2000 in the percentage of consumers who say they buy locally produced foods because the food is fresher.



24 *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[25]
(CONTINUED)

Reasons for buying locally produced food vary by county. Henderson and Buncombe County residents are much less likely to say they purchase locally produced foods because they are fresher in 2004 than they were in 2000.

	COUNTY							
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
FOOD IS FRESHER	73	49	74	49	55	55	76	46
IT CONTRIBUTES TO THE LOCAL ECONOMY	15	28	16	27	29	33	11	29
I AM SUPPORTING MY NEIGHBORS	19	21	18	23	26	20	21	15
FOOD IS OF BETTER QUALITY	21	19	20	16	27	19	21	27
TASTES BETTER	20	19	17	18	12	15	29	21
FOOD IS SAFER	7	14	7	16	5	14	8	8
MY PERSONAL HEALTH & WELL-BEING	8	11	9	13	6	6	5	8
I AM HELPING SAVE THE ENVIRONMENT	3	8	4	10	3	5	1	3
CONVENIENT LOCATION	-	5	-	4	-	1	-	8
CHEAPER	11	4	14	4	4	5	6	2
I DON'T BUY LOCALLY PRODUCED FOOD	3	2	3	2	4	2	2	3
OTHER	-	4	-	4	-	2	-	5
NONE	2	3	1	3	5	2	2	3

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[25] *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[26]
(CONTINUED)

In general, the older the consumer the more likely freshness is a top reason for buying locally-grown food. However, for consumers 55 years of age or older, freshness is less likely to be a top reason for buying locally produced food in 2004 than it was in 2000.

			AGE					
			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
FOOD IS FRESHER	73	49	55	37	57	52	76	55
IT CONTRIBUTES TO THE LOCAL ECONOMY	15	28	26	34	23	32	15	22
I AM SUPPORTING MY NEIGHBORS	19	21	29	25	19	19	21	15
FOOD IS OF BETTER QUALITY	21	19	8	12	28	27	24	15
TASTES BETTER	20	19	21	20	21	18	19	17
FOOD IS SAFER	7	14	5	19	5	8	7	16
MY PERSONAL HEALTH & WELL-BEING	8	11	11	10	7	9	6	8
I AM HELPING SAVE THE ENVIRONMENT	3	8	-	7	2	5	2	7
CONVENIENT LOCATION	-	5	-	5	-	3	-	6
CHEAPER	11	4	20	8	12	3	9	2
I DON'T BUY LOCALLY PRODUCED FOOD	3	2	3	2	1	3	4	2
OTHER	-	4	-	4	-	3	-	5
NONE	2	3	5	3	2	3	2	2

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

26 *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOTAL REASONS FOR BUYING LOCALLY PRODUCED FOOD[27]
(CONTINUED)

Freshness is less of a compelling reason for buying locally-grown food among all income segments in 2004 than it was in 2000.

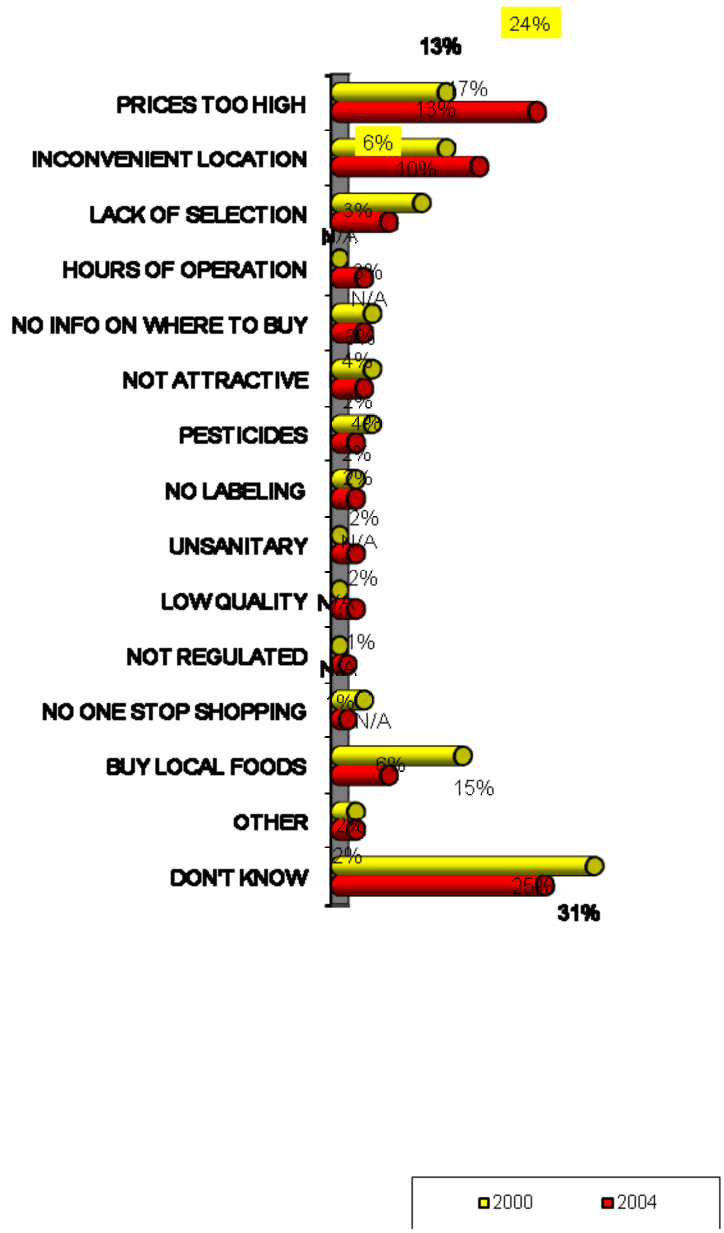
	INCOME							
			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
FOOD IS FRESHER	73	49	68	47	65	46	69	47
IT CONTRIBUTES TO THE LOCAL ECONOMY	15	28	15	28	22	28	22	35
I AM SUPPORTING MY NEIGHBORS	19	21	19	19	21	24	25	22
FOOD IS OF BETTER QUALITY	21	19	25	8	16	25	34	18
TASTES BETTER	20	19	17	11	24	21	16	17
FOOD IS SAFER	7	14	9	17	10	9	-	9
MY PERSONAL HEALTH & WELL-BEING	8	11	7	11	7	10	6	9
I AM HELPING SAVE THE ENVIRONMENT	3	8	1	3	1	7	3	10
CONVENIENT LOCATION	-	5	-	6	-	1	-	9
CHEAPER	11	4	17	6	13	9	6	1
I DON'T BUY LOCALLY PRODUCED FOOD	3	2	4	3	4	1	-	4
OTHER	-	4	-	6	-	4	-	3
NONE	2	3	5	6	1	-	3	3

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

27 *"Could you please tell me the one most important reason why you would buy locally produced food? Why else do you buy it?"*

TOP REASON FOR NOT BUYING LOCALLY PRODUCED FOOD[28]

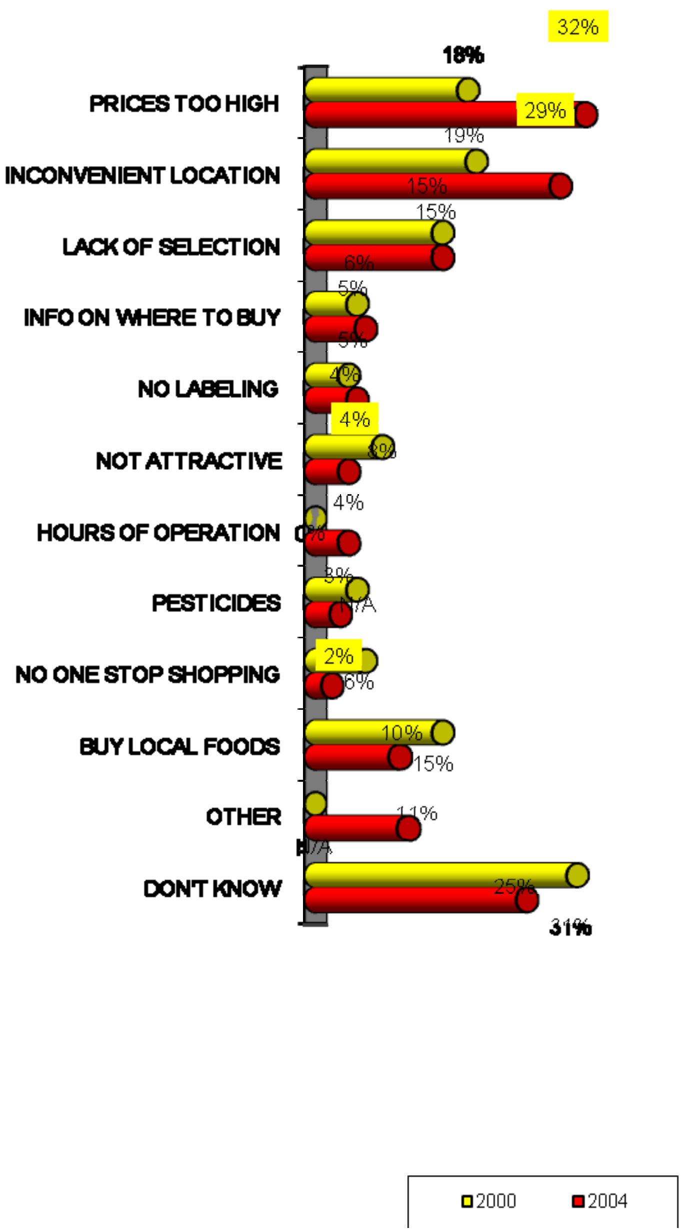
The top reasons for not buying locally produced food are price and inconvenience. The percentage of people who say that price keeps them from purchasing locally produced foods has increased from 13% in 2000 to 25% in 2004. 17% feel inconvenient locations are a problem.



28 *"Could you please tell me the one most important reason why you NOT would buy locally produced food?"*

TOTAL REASONS FOR NOT BUYING LOCALLY PRODUCED FOOD[29]

When asked to name *all* their reasons for not buying locally produced food, 32% of all consumers mentioned high prices, 29% mentioned inconvenient locations, and 15% mentioned lack of selection.



29 *"Could you please tell me the one most important reason why you NOT would buy locally produced food? Why else wouldn't you buy locally produced food?"*

TOTAL REASONS FOR NOT BUYING LOCALLY PRODUCED FOOD[30]

(CONTINUED)

Buncombe County residents are more likely than other residents to mention price as the top reason for not buying locally produced foods in 2004. Residents in this county are more likely to place higher importance on price and convenience this year than in 2000.

			COUNTY					
			BUNCOMBE		MADISON		HENDERSON	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %	2000 (100) %	2004 (100) %
PRICES TOO HIGH	18	32	20	35	10	24	16	25
INCONVENIENT LOCATION	19	29	20	35	20	20	17	17
LACK OF SELECTION	15	15	18	15	11	19	9	13
I BUY LOCALLY PRODUCED FOOD	15	10	7	10	15	4	34	12
LACK OF INFO ABOUT WHERE TO BUY	5	6	6	7	1	5	5	3
NO LABELING ON FOOD INDICATING LOCALLY-GROWN	4	5	5	5	2	4	3	6
FOOD ISN'T PACKAGED ATTRACTIVELY	8	4	10	5	3	4	3	3
HOURS OF OPERATION	-	4	-	5	-	1	-	3
PESTICIDES	5	3	5	3	3	3	6	2
CAN'T BUY ALL GROCERY ITEMS AT ONE LOCATION	6	2	6	2	1	5	6	3
NOT FRESH	-	2	-	3	-	1	-	1
UNSANITARY	-	2	-	1	-	6	-	3
LOW QUALITY	-	2	-	1	-	2	-	3
NOT REGULATED	-	1	-	2	-	-	-	-
DON'T LIKE TO SHOP OUTSIDE	-	1	-	1	-	2	-	-
OTHER	-	3	-	3	-	6	-	-
DON'T KNOW	31	25	33	20	53	35	23	36

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

30 *"Could you please tell me the one most important reason why you NOT would buy locally produced food? Why else wouldn't you buy locally produced food?"*

TOTAL REASONS FOR NOT BUYING LOCALLY PRODUCED FOOD[31]

(CONTINUED)

Consumers with annual household income less than $25,000 per year are much more likely this year than they were in 2000 to claim high prices keep them from purchasing locally produced foods.

			AGE					
			LESS THAN 35		35 TO 54		55 & OLDER	
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (38) %	2004 (58) %	2000 (85) %	2004 (149) %	2000 (152) %	2004 (75) %
PRICES TOO HIGH	18	32	18	29	20	29	13	27
INCONVENIENT LOCATION	19	29	26	25	23	24	15	23
LACK OF SELECTION	15	15	24	22	8	16	12	10
I BUY LOCALLY PRODUCED FOOD	15	10	13	3	17	11	20	8
LACK OF INFO ABOUT WHERE TO BUY	5	6	3	7	6	6	4	2
NO LABELING ON FOOD INDICATING LOCALLY-GROWN	4	5	3	2	3	7	4	3
FOOD ISN'T PACKAGED ATTRACTIVELY	8	4	3	5	2	3	8	6
HOURS OF OPERATION	-	4	-	2	1	3	1	3
PESTICIDES	5	3	3	3	3	2	5	3
CAN'T BUY ALL GROCERY ITEMS AT ONE LOCATION	6	2	11	5	6	3	2	2
NOT FRESH	-	2	-	-	-	2	-	2
UNSANITARY	-	2	-	2	-	4	-	3
LOW QUALITY	-	2	-	2	-	3	-	-
NOT REGULATED	-	1	-	-	-	1	-	-
DON'T LIKE TO SHOP OUTSIDE	-	1	-	-	-	1	-	1
OTHER	-	3	-	5	-	3	-	1
DON'T KNOW	31	25	29	32	35	27	39	35

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[31] *"Could you please tell me the one most important reason why you would NOT buy locally produced food?*

TOTAL REASONS FOR NOT BUYING LOCALLY PRODUCED FOOD[32]
(CONTINUED)

Consumers with household income less than $25,000 are less likely than other consumers to feel inconvenient location is a reason for not buying locally produced food.

			INCOME					
			UNDER $25,000	UNDER $25,000	$25,000-$49,999	$25,000-$49,999	$50,000 & MORE	$50,000 & MORE
	2000 TOTAL STUDY (300) %	2004 TOTAL STUDY (300) %	2000 (72) %	2004 (35) %	2000 (93) %	2004 (63) %	2000 (32) %	2004 (87) %
PRICES TOO HIGH	18	32	12	22	13	27	22	22
INCONVENIENT LOCATION	19	29	9	17	17	27	25	23
LACK OF SELECTION	15	15	8	17	15	13	22	9
I BUY LOCALLY PRODUCED FOOD	15	10	28	8	20	7	16	10
LACK OF INFO ABOUT WHERE TO BUY	5	6	1	8	5	3	6	4
NO LABELING ON FOOD INDICATING LOCALLY-GROWN	4	5	4	8	2	3	3	5
FOOD ISN'T PACKAGED ATTRACTIVELY	8	4	7	11	3	4	6	3
HOURS OF OPERATION	-	4	-	-	2	3	-	4
PESTICIDES	5	3		3		4		3
CAN'T BUY ALL GROCERY ITEMS AT ONE LOCATION	6	2	3	3	10	3	-	3
NOT FRESH	-	2	-	-	-	1	-	1
UNSANITARY	-	2	-	-	-	7	-	2
LOW QUALITY	-	2	-	3	-	3	-	2
NOT REGULATED	-	1	-	-	-	-	-	1
DON'T LIKE TO SHOP OUTSIDE	-	1	-	-	-	1	-	-
OTHER	-	3	-	9	-	1	-	2
DON'T KNOW	31	25	39	25	34	33	28	38

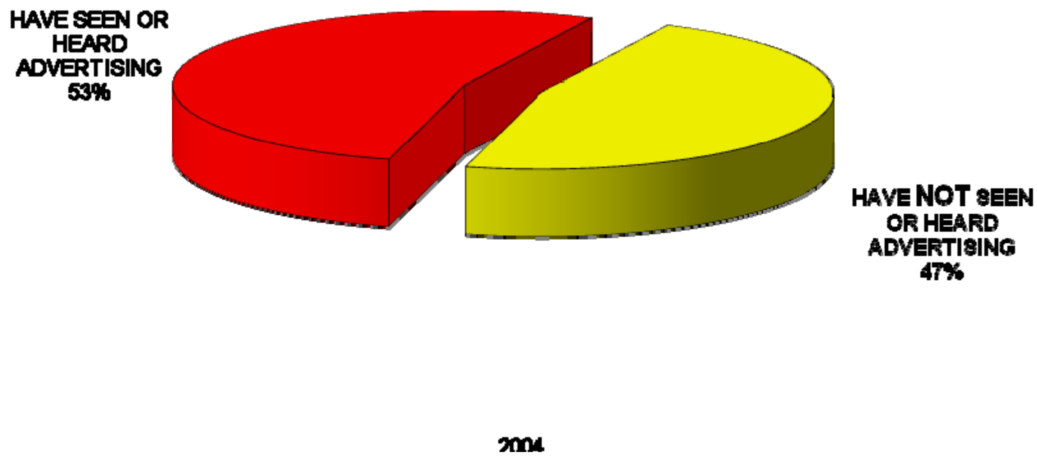
Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

[32] *"Could you please tell me the one most important reason why you NOT would buy locally produced food?*

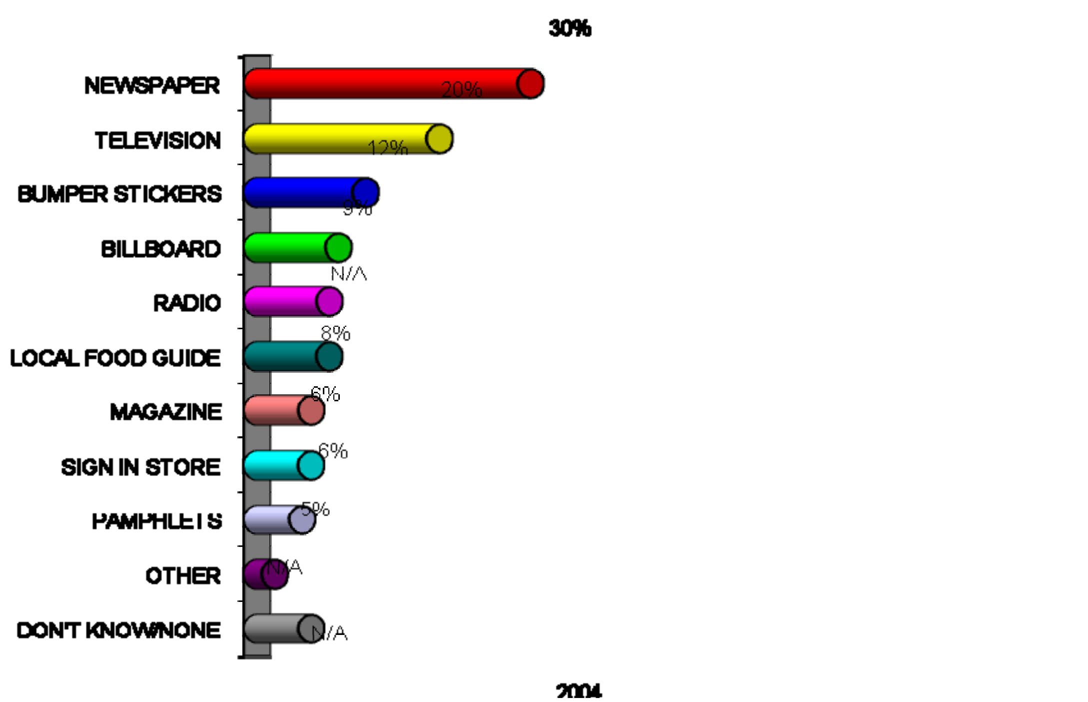
MEDIA AWARENESS

ADVERTISING AWARENESS[33]

Positively, over half (53%) Asheville area consumers claim they have seen or heard advertising promoting locally-grown food in the past year.



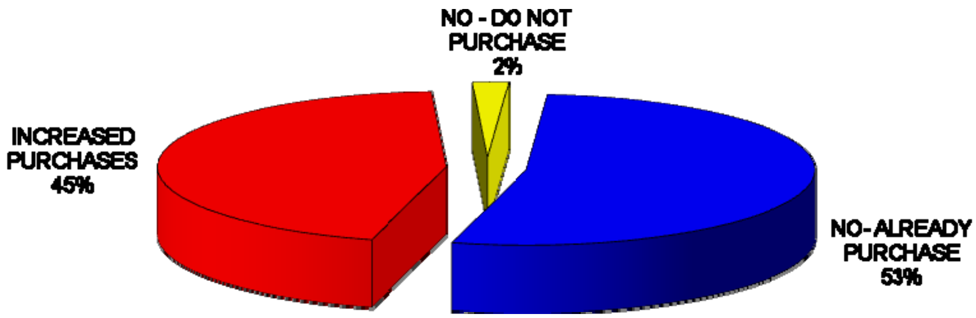
Of those who recall seeing or hearing an advertisement for locally-grown food, 30% say they saw an advertisement in a newspaper. Two in ten (20%) heard about locally-grown food on television, and 12% saw bumper stickers.



33 *"Have you seen or heard any advertising or messages promoting locally grown food in the last year? If so, do you remember where?"*

INFLUENCE OF ADVERTISING[34]

Also positive, nearly half (45%) of all Asheville area consumers claim that seeing or hearing the advertisements motivated them to increase their purchases of locally-grown food.



Asheville area consumers older than 55 are most likely to claim that advertisements have increased their purchases of locally-grown foods.

AGE				
	2004 TOTAL STUDY (300) %	LESS THAN 35 (58) %	35-45 (149) %	55 & OLDER (75) %
No – already purchase what is needed	53	48	57	44
Yes – Increased purchases	45	44	39	51
No – do not purchase	2	7	5	5

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

Consumers with incomes under $25,000 are more likely than other consumers to increase their purchases of locally-grown foods due to advertising.

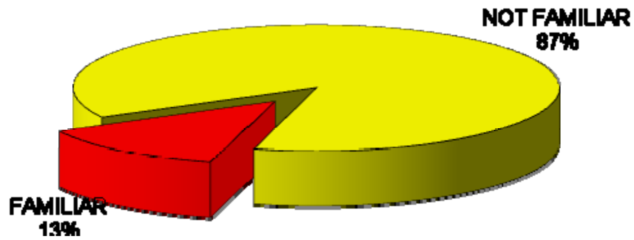
INCOME				
	2004 TOTAL STUDY (300) %	UNDER $25,000 (35) %	$25,000 TO $49,999 (63) %	$50,000 & MORE (87) %
No – already purchase what is needed	53	38	57	50
Yes – Increased purchases	45	56	37	48
No – do not purchase	2	6	6	1

Yellow shading indicates a significant difference from the previous year at the 95% confidence interval.

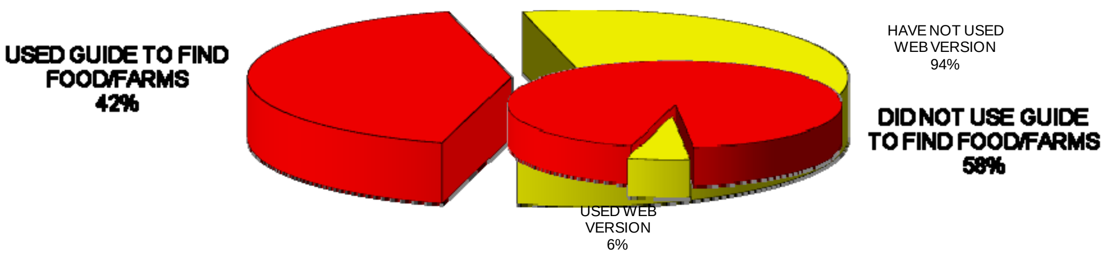
[34] *"Have these messages or what you learned about locally grown food increased your purchase of locally grown food?"*

LOCAL FOOD GUIDE[35]

Most consumers (87%) are not familiar with the Local Food Guide.



Of those who have heard of the Food Guide, 42% used it to find local food or farms.



Less than one in ten (6%) consumers who are familiar with the Local Food Guide has used the web version of the guide.

35 *"Are you familiar with the Local Food Guide, published by the Appalachian Sustainable Agriculture Project? Have you used it to find local food or farms? Have you used the web version of the guide?"*