FARM OUTLET CUSTOMER PROFILES

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Who are the visitors to direct farm marketing operations and what are they looking for? This section helps to provide answers to these questions based on information on customers from visitor surveys at direct marketing establishments in several states including Arizona, Illinois, Wisconsin, Michigan, Ohio and New York and national surveys of produce consumers conducted for ***The Packer*** magazine. Trends that affect the character of the general population in the U.S. and Arizona are very likely to affect direct marketing operations and are worth considering. Visitation to farm market outlets in other states differs from that in Arizona in the distance that visitors are willing to drive, in the percentage of visitors who are women and in their reasons for visiting the area. There are similarities between visitors including how they learned about the direct marketing outlets, educational levels and the types of produce products that they are looking for.

General Demographic and Produce Purchasing Trends

Several of the best known demographic trends in the U.S. are worth noting. We are an aging population. Over half of our population was over the age of 33 in 1990. We are becoming more urban. Urban dwellers represented 87.5% of the Arizona population in 1990 compared to 55.5% in 1950. We are becoming more racially and culturally diverse. Almost 20% of the Arizona population belonged to a racial minority in 1990 compared to 13% in 1950. More women are working full time. Fifty-five percent of all Arizona women over 16 years of age were in the work force in 1990. The U.S. Department of Labor predicts that by 1995 a full 80% of women aged 22 to 44 will work outside the home. The average household size is shrinking. Single-person households accounted for one fourth of all households in Arizona and the U.S.

What do these trends mean for direct farm marketers? They mean that a larger share of their customers are likely to be older. Older visitors may be more inclined to buy prepicked rather than pick your own produce. Customers are likely urban dwellers who are not only visiting to buy produce but as a form of recreation or a way to get out of the city. More customers are likely to be looking for specialty produce because more of them are from diverse cultural and racial backgrounds. Fewer women have time for canning and preserving produce. Consequently, more women may be interested in buying products for fresh consumption or be interested in already preserved or baked products such as jams, jellies, pies and breads. Purchases per household may be less because of smaller household size and lack of time to can.

Women still make the bulk of all food purchases in the U.S. A full 86% of the produce buyers surveyed for ***The Packer Fresh Trends*** edition were women. Women are more sensitive to price than men and are more likely to try new or unusual fruits and vegetables. The percentage of women making purchasing decisions in households with children under 18 is a whopping 99%. However, because visits to direct farm market outlets are often a family affair and are often seen as a form of recreation, a larger number of men and children are likely to be involved in making purchasing decisions. Also, customers may be somewhat less concerned about price than they would be in a supermarket.

Lessons from Surveys of Farm Outlet Customers

Table 1 summarizes the findings based on customer surveys in six states. The Ohio survey is somewhat older than the other surveys. The Illinois surveys were conducted for strawberry U-pick operations only. The results show that the customers to Arizona direct marketing establishments are less likely to be women and are younger than those in many of the other state studies. Customers in all the studies tended to have relatively high levels of education. The average household size in two studies was between two and four people. Like Michigan customers, over a third of the Arizona customers are first time customers.

What really sets the Arizona customer apart from customers from the Northeast and Midwest is their willingness to travel longer distances to purchase at direct farm market outlets. Perhaps because of the distances traveled, more Arizona visitors come on the weekend than in New York. Several of the studies provide data that suggest that visiting farm outlets is a recreational experience. However, the freshness, quality, taste and prices for produce strongly influence customer opinions of the farm outlets.

Without exception the most common way for customers to have learned of a particular farm outlet was by word of mouth or because a friend or family member told them about it. A large percentage of customers had seen signs for the outlet as they were driving in several states.

When asked about what they wanted or how the outlets could be improved, customers commonly identified improving advertising, signs and instructions, and adding to services such as tours, rides, restrooms, and parking. However, most surveys indicate that there is a high level of customer satisfaction with the farm outlets. Apples, corn, peaches, strawberries, tomatoes and pumpkins were commonly mentioned by customers as products they either would like to buy or did buy during their visit.

The per person expenditures at farm outlets are not easy to compare due to differences in the years when these studies were conducted and differences in the types of farm outlets where the interviews were conducted. In the Michigan study, per person expenditures were highest at U-picks and wineries and lowest at festivals. Expenditures at roadside stands and farmers' markets were intermediate (at about $7.30 and $8.75 per person, respectively).

In summary, older retired customers represent an important market for direct marketers, but not the only one. Arizona customers are more likely than Eastern customers to drive distances of 70 to 80 mile to visit farm outlets. However, because of the distances, they are generally coming predominantly on weekends and appear to be very interested in having a farm experience with their family or friends. The next article in this section examines customer characteristics from the Arizona study in more detail.

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Table 1. Comparison of Visitor Profiles from Various States

Characteristic	Arizona	Illinois	Wisconsin	Michigan	New York	Ohio
Sample size	904	136	873		856	474
% female	55%			65%	75%	
avg. age	approx. 35-45	53-55	49	45	25-40	45-64
% with some college education	69%		60%	65%	65%	
Household size		2.9-3.0	2-4			3.3
% first time visitors	32%			39%	9%	
% coming from within 20 miles	less than 11%	approx. 75%	80% within 40 miles		78%	93%
Most common way to learn of U-pick	word of mouth (45%)	word of mouth (66%)	word of mouth (55%)	word of mouth (51%)	word of mouth	
% visiting on weekend	71%				52%	
Purpose of trip	buy ag products (79%)	pick strawberries, 70% consider it recreation		54%-vacation & vacation and other 10% buy ag products	select fresh berries at reasonable prices & for recreational experience	
What customers like about direct market-ing operation	rural or farm experience, produce freshness and quality		quality, service, fair prices			freshness, taste, ripeness of produce
What customers dislike			few (only 15% cited dislike)			distance from home, prices, parking and traffic problems
What customers want	better advertising & signs, restrooms, improved roads				improve field conditions, parking, advertising, ease of picking, instruc-tions (3-7%)	Add services-extend hours, post hours, sell snacks, rides, tours, etc.
Products they usually purchase or want to purchase	apples, corn, pumpkins, tomatoes			cherries, corn, strawberries, blueberries, peaches, apples, raspberries, eggs, lettuce, melons, tomatoes		apples, sweet corn, peaches, cider, cantaloupe, tomatoes, strawberries, pumpkins, honey, peppers
Where visitors spent their money & how much they spent per person	$14 for nonlocals, $9 for locals	$6 per visit		spent the most: wineries and U-Picks ($12-13) spent the least: festivals ($.71)		avg. annual expenditure at roadside markets: $45

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