ILLINOIS STEWARDSHIP ALLIANCE

Annual Meeting

FEBRUARY 15, 2018
STATE HOUSE INN, SPRINGFIELD, IL
Buy Fresh Buy Local

Overview, Trends, and Strategies for the Future
History of the Chapter

- Celebrating 10 Years!
- Began in 2007
- Educating Consumers was considered a top concern of farmers
- Buy Fresh Buy Local National Campaign was gaining momentum.
- Began in Springfield and slowly expanded to Bloomington, Champaign, and Peoria
Buy Fresh Buy Local
Membership & Guide

- 115 members in 23 counties
  - 84 farmers
  - 9 farmers markets
  - 12 restaurants
  - 7 grocers/retailers
  - 2 processors
  - 1 campus housing facility
COMMUNITY SUPPORTED DINNER SERIES
This series brought together more than 120 eaters to hear from local farmers, learn, grow, and discuss over good food.

FARMERS MARKET MEAL KIT PROGRAM
370 meal kits sold this year!

LOCAL FLAVORS
21 Local Flavors events were hosted at restaurants across Illinois

EAT LOCAL CHALLENGE
194 eaters pledged to spend $20 each week on locally-grown food during the month of September

HOLIDAY & WINTER MARKETS
3500+ shoppers benefited from increased access to local food over the winter and 35+ farmers benefited from increased sales

BUY FRESH BUY LOCAL DIRECTORY & WEBSITE
1000 printed directories in 2017
31,200 website views per year

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Shameless Winter Market Plug

Saturday, February 24th
Saturday, March 24th
Saturday, April 28th

Third Presbyterian Church
Downtown Springfield
9am - 12noon
Time to Shake Things Up
Internal Evaluation

Buy Fresh Buy Local Directory - Effectiveness

- High demand for Buy Fresh Buy Local Guide
- From a survey of our members, a listing in the Buy Fresh Buy Local Directory is still the number one reason people join
- Farmers continue to seek membership from both inside our 23 counties and outside our 23 counties.
The Takeaway

There is a lot of value in the Buy Fresh Buy Local Directory for both farmers and eaters.
Internal Evaluation

Local Food Programming - Effectiveness

▪ When the purpose of the program was to raise awareness for local food—why it’s important or how to find it—the program was successful
  ▪ Eat Local Challenge

▪ When the program purpose was to try to increase purchasing of local foods by restaurants or retailers, the programs had mixed results
  ▪ Buy Fresh Buy Local Grocery Days
  ▪ Local Flavors
  ▪ Farmers Market Meal Kits
The Takeaway

Raising awareness for local food is an effective and achievable goal, but building long-term connections between farmers and buyers is not an issue that can be solved solely through an education or marketing campaign.
Internal Evaluation

Local Food Programming - Capacity

- A heavy emphasis on event-based programs,
  - Local Flavors
  - Community Supported Dinner Series
  - Holiday Markets
- Requires lots of boots on the ground in the community where the event is hosted and that has resulted in an inability to expand the chapter outside of central Illinois.
- An increasing number of programs added in recent years has stretched capacity to the limit.
The Takeaway

- Event-based programs are extremely time consuming and difficult to manage and they are even more difficult in communities outside of Springfield.
- We don’t have the capacity to continue these programs in the same way that we’ve been doing them.
External Evaluations

1. What’s the lay of the land for farmers?
   - What does the average Buy Fresh Buy Local Farmer look like?
   - Are local food sales increasing for our members? Or decreasing?
   - What are the biggest barriers facing farmers?
   - Where do our farmer members want us to focus or resources?

2. What’s the lay of the land for eaters?
   - Why do people buy locally?
   - What are the biggest barriers preventing people from buying locally?

3. What’s happening with farmers markets and farm-to-table?
The Lay of the Land For Farmers

BFBL Member Survey- 31 Responses from a total of 84 farmers
The average BFBL Member:
- between 40-60 years of age
- male or female
- white
- farms less than 5 acres
- 10+ years farming
- makes less than $35,000 net income from their farming operation each year.
The Lay of the Land For Farmers

14. If you operate a CSA (Community Supported Agriculture) program, how would you describe your CSA sales this year?

23 responses

- Higher than last year: 56.5%
- Lower than last year: 17.4%
- About the same as last year: 21.7%
- I don't have a CSA: 5.2%
- I don't keep sales record for my CSA transactions: 1.7%

CSA Sales are slightly declining
The Lay of the Land
For Farmers

Biggest barriers facing farmers today, according to farmer survey results?

1. Consumer desire for convenience food
2. A Lack of transparency and truthfulness in how other farmers raise their products
2. Greenwashing by restaurants and retailers
The Lay of the Land For Farmers

Where do farmers want us to focus our efforts?
1. Working with institutions and policy makers to increase sales of locally-grown food to hospitals, institutions, and government agencies.
2. Bringing together farmers to develop farmers and food hubs in order to reach new audiences and buyers
3. Increased efforts to market the chapter and its members directly to consumers and reach new consumers
The Takeaway

Farmers are still struggling to make a living and overall sales growth is slow
The Lay of the Land For Eaters

Eat Local Challenge Survey - 194 participants, mostly regular farmers market shoppers

Top 3 reasons why eaters buy locally:
- 1. Support local
- 2. Freshness/Flavor
- 3. Health Benefits

Top 3 reasons that prevent eaters from buying locally: 194 participants, mostly regular farmers market shoppers
- 1. Not enough time to cook from scratch
- 2. Higher Costs of meat/eggs/dairy
- 3. Hard to find outside of the farmers market
The Lay of the Land
For Eaters

U.S. Grocery Shopper Trends Survey (2011) Top Reasons for buying locally

- 83% - Freshness
- 68% - To support the local economy
- 56% - Taste

The idea of “transparency” was echoed across multiple grocery studies.

- “Consumers want to know the real story behind their food, and how that item made its way from the source to the store. GMO transparency is top-of-mind, but shoppers seek out other details, too, such as Fair Trade certification, responsible production and animal welfare standards.” - Whole Foods 2018 Top Food Trends

- “It’s a hot-button issue. In our focus groups with young women, they want to know where their food comes from. The actual source.” - Scott Mushkin, lead food trends researcher at Wolfe Research in New York
Eaters buy locally because they see the value in supporting local businesses and they want transparency in their food system, but they still need help finding local sources and even when they do find them, convenience and price are still barriers.
Farmers Market Trends

- Number of farmers markets grew 180% between 2006 and 2014.
- Number of farmers markets grew just 4% between 2014 and 2018.
  - 2014= 8,250 farmers markets
  - 2018= 8600 farmer markets
- Direct-to-consumer sales have also leveled off:
  - 2002 - 2007 direct-to-consumer sales increased 32%
  - 2007 - 2012, the increase was just 1%

Restaurant Trends
National Restaurant Association

2016
1. Locally sourced meats and seafood
2. Chef-driven fast-casual concepts
3. Locally grown produce
4. Hyper-local sourcing
5. Natural ingredients/minimally processed food
6. Environmental sustainability
7. Healthful kids’ meals
8. New cuts of meat
9. Sustainable seafood
10. House-made/artisan ice cream

2017
1. Hyper-local sourcing (e.g. restaurant gardens, onsite beer brewing, house-made items)
2. Chef-driven fast-casual concepts
3. Natural ingredients/clean menus
4. Environmental sustainability
5. Locally sourced produce
6. Locally sourced meat and seafood
7. Food waste reduction
8. Meal kits (e.g. pre-measured/prepped raw ingredients for home preparation)
9. Simplicity/back to basics
10. Nutrition

2018
1. Hyper-local (e.g. restaurant gardens, onsite beer brewing, house-made items)
2. Chef-driven fast casual concepts
3. Natural ingredients/clean menus
4. Food waste reduction
5. Veggie-centric/vegetable-forward cuisine (e.g. fresh produce is star of the dish)
6. Environmental sustainability
7. Locally sourced meat and seafood
8. Locally sourced produce
9. Simplicity/back to basics
10. Farm/estate-branded items
The Takeaway

Farm-to-table restaurants aren’t a new/trendy concept anymore and Farmers market growth has plateaued. The local food movement has reached the core group of early adopters who care deeply about local food....but it’s struggling to reach a broader audience.
The Lessons Learned

- There is a lot of value in the Buy Fresh Buy Local Directory for both farmers and eaters.
- Raising awareness for local food is an effective and achievable goal, but building long-term connections between farmers and buyers is not an issue that can be solved solely through an education or marketing campaign.
- Event-based programs are extremely time consuming and difficult to manage and they are even more difficult in communities outside of Springfield.
- We don’t have the capacity to continue these programs in the same way that we’ve been doing them.
- Farm-to-table restaurants aren’t a new/trendy concept anymore and Farmers market growth has plateaued. The local food movement has reached the core group of early adopters who care deeply about local food....but it’s struggling to reach a broader audience.
- Eaters buy locally because they see the value in supporting local businesses and they want transparency in their food system, but they still need help finding local sources and even when they do find them, convenience and price are still barriers.
- Farmers are still struggling to make a living and overall sales growth is slow.
The Future Of Buy Fresh Buy Local: 4 Steps

1. Transition Buy Fresh Buy Local Chapter into a statewide directory and improve transparency and functionality.
   - Eaters still struggle to find local food and connect with local farms, and farmers/local food businesses still think the directory is valuable.
   - No one else in Illinois is creating a statewide print directory – there is a gap to fill
   - Increase transparency by including a list of farming practices next to each farm
   - Make the directory easier to use by including an index
   - Re-organize the Buy Fresh Buy Local website to be more functional
2. Create a directory for wholesale buyers

- Wholesale buyers struggle to find farmers that are already at scale to sell locally on a long-term basis.
- Sales to institutions was a key area where farmers wanted to see increase focus.
The Future of Buy Fresh Buy Local: 4 Steps

3. Expand the Eat Local Challenge statewide
   - Awareness-raising programs are still valuable and effective
   - Will help people understand “why” local food is important
   - Will help people connect with the Buy Fresh Buy Local directory and find local food in their area.
   - Will help reach the audience “beyond the choir”
The Future of Buy Fresh Buy Local: 4 Steps

4. Shelve locally-based events
   - We don’t currently have the capacity to effectively continue to administer these events
   - Best-suited for locally-based groups or individuals
You heard our takeaways from 10 years of BFBL programming. Do these challenges reflect your experience with local food or our programs?
We laid a strategy for BFBL moving forward:

- make the Directory for consumers statewide;
- create a Directory for wholesale buyers;
- make the Eat Local Challenge statewide;
- and discontinue locally-based events.

Do you think this is the right strategy for the Alliance?
What can you do next?
I’m glad you asked

• Like the Buy Fresh Buy Local page
• Join a CSA
• Talk to your local farmer about hosting a CSA pick-up at your house or place of businesses
• Shop at a winter farmers market near you (February 24th in Springfield!)
• Volunteer at your local farmers market this summer
• Sign up for the Eat Local Challenge in September
• Save the Date for Local Food Lobby Day