UNDERSTANDING BARRIERS TO DIVERSIFICATION AMONG DAIRY FARMERS

This two-part study assessed: 1) dairy farmers' knowledge of issues related to diversification as well as their interest in participating in various educational programs, and 2) consumer demand for locally produced vegetables and specialty crops. Results showed that farmer knowledge of available strategies, legal/regulatory issues, and production may be a significant barrier to diversification on dairy farms. However, some dairy producers indicated a strong interest in learning more about diversification strategies, presenting significant opportunities for extension experts to train some producers on production, business management, and marketing for a diversified dairy operation. Findings from the consumer survey indicated that consumption of Pennsylvania grown produce is not yet maximized. Consumers express interest in more markets across the state, and in their communities. Further investigation of the costs and benefits of a labeling campaign for Pennsylvania grown food is recommended.

Final Report

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Understanding Barriers to Diversification Among Dairy Farmers

Final Report to the Pennsylvania Department of Agriculture
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Abstract

Diversification strategies may help to increase profitability on some dairy farms in the northeast. We assessed dairy farmers' knowledge of issues related to diversification as well as their interest in participating in various educational programs. Our results show that farmer knowledge of available strategies, legal/regulatory issues, and production may be a significant barrier to diversification on dairy farms. However, there are some dairy producers who indicate a strong interest in learning more about diversification strategies. Thus, there may be significant opportunities for extension experts to train some producers on production, business management, and marketing for a diversified dairy operation.

Introduction

For much of the 20th century, the dairy industry was highly decentralized and organized around family farms and small dairies. In recent years, however, the dairy industry, like other sectors of the agricultural economy, has become dominated by a few large firms and cooperatives. Industrial concentration has been driven by several factors. Concentration in fluid milk processing ahs been fueled by the pursuit of scale economies and the desire to increase capacity utilization (Dobson and Christ, 2000). The two largest milk processors, Suiza and Dean foods, which together account for almost 35% of fluid milk sales, cite these factors as the main forces behind a flurry of acquisitions in the 1990s. Both firms argue that as large supermarkets have gained greater market power, they want to be served by only one or two suppliers. Smaller dairies cannot serve these large retailers either geographically or in the volume demanded. Similar factors account for concentration in the production of manufactured dairy products.

At the same time, there have been dramatic changes in milk production, the number of cows, and their geographic distribution. Technological advancements have enabled farmers to produce more milk with fewer cows. Indeed, over the past thirty years, the number of cows has shrunk from 132 million head to 9 million head.

The dairy industry in the northeastern United States has followed this trend. The number of dairy farms has decreased significantly over time while the average farm size has increased (Stokes, 2006; Hyde, et al., 2007). At the same time, as Hyde, et al. (2007) point out that, total milk production increased slightly in the states of Pennsylvania and New York between 1990 and 2004. Thus, while the number of farmers has declined, dairy production remains an important component of the agricultural sector in the northeast.

Despite the industry's strength overall in the northeast, the fact remains that many dairy farms exit the industry each year. While there are several factors behind this trend, it is likely that many exit because of business failure. Still many others that remain in operation may be missing out on opportunities to increase profitability through enterprise diversification, which can include alternatives such as specialty crops, milk jugging, ice cream, and cheese.

There are many barriers to these kinds of diversification. There are certainly capital investment requirements for many value-added alternatives such as cheese. But some of the greatest barriers may be a lack of knowledge of how to produce ***and*** market value-added products. Production processes are complicated for many of these products. Food science expertise must be applied to ensure that the resulting products are safe and, where appropriate, shelf-stable. In addition, marketing value-added products requires a very different skill set than is required to market milk. Most farms market their milk through a cooperative, which sends trucks periodically to pick up milk from the farm. Successfully marketing value-added products requires that the farm manager understands wholesaling, retailing, customer service, delivery logistics, etc. Clearly, enterprise diversification is not the answer for every dairy farmer and is by no means a guarantee of success. But dairy farmers need relevant knowledge to make an informed decision about diversification.

Although this research is potentially relevant to many regions, the northeastern United States is particularly attractive for producers of value-added agricultural products. Dairy farmers in the Mid-Atlantic and New England are very close to major metropolitan centers such as New York City, Boston, Washington DC, Baltimore, Philadelphia, and others. These cities and surrounding suburbs provide many affluent potential customers for producers in the region.

Certainly extension educators have knowledge to share with dairy farmers. Penn State and Cornell Cooperative Extension educators regularly hold trainings in value-added dairy opportunities and, more generally, production and direct marketing. However, Extension educators can benefit from direct information of dairy farmers' interest in, knowledge of, and need for understanding different marketing and production aspects. Hence, the primary objectives of this research project were to better understand the barriers to diversification among Pennsylvania dairy farms and the need for different types of educational programs among dairy farmers in Pennsylvania.

Methodology

To address these objectives, we administered a written survey of dairy producers in Pennsylvania's rural-urban fringe counties of York, Lancaster, and Berks. We chose these locations because there is intense pressure on dairy farmers to sell their land for development. At the same time, however, their proximity to large population centers makes diversification a more viable strategy than it might be in more rural parts of the state. .

The survey was designed to gather data related to potential barriers to diversification, dairy farmers' knowledge of diversification issues, and their interest in participating in various educational programs. In February of 2005, a mail survey was sent to 350 dairy farmers in southeastern Pennsylvania. We followed Dillman's (2000) Total Design Method, which entails reminder postcards and a second survey mailing to non-respondents. Fifty-three surveys were returned because of bad addresses, leaving an effective sample size of 267. Seventy-two usable surveys were returned, for a response rate of 24 percent. The results described below rely on simple statistical analyses of the survey data. Note that some respondents chose not to answer one or more questions.

Results

The responding farms are not necessarily representative of the Pennsylvania dairy industry (Table 1). For example, the mean number of milking cows in the sample is only 55.1. The state average dairy farm size was 63 cows (USDA-NASS, 2006). Thus, our sample draws relatively heavily from smaller farms. Although this may represent a herd size bias in the results, this is not unexpected. Like many commodity-producing farms, the larger farms tend to be more efficient (i.e., relatively low cost) producers. Thus, they are often more profitable than their smaller counterparts and therefore more likely to focus on efficient commodity production, and possibly expansion, rather than diversification strategies.

We requested that each respondent indicate their level of knowledge related to three different sets of issues. These included diversification strategies, managerial skills needed to diversify, and legal/regulatory issues. In addition, we also asked respondents to indicate their level of interest in attending different types of educational programs. Each of these topics is discussed below.

Table 1. Statistical Profile of Sample Dairy Farms

Farm Characteristic	Units	Mean	Std. Dev.	n=
Operator’s age	years	40.7	12.2	71
Farming tenure	years	18.2	13.3	69
Number of lactating cows	head	55.1	64.3	67
Full-time workers	people	1.7	1.7	68
Part-time workers	people	1.4	1.5	66
Cropland	acres	148.1	215.4	71
Value of milk sales	$	208,074	334,664	56

Farmer Knowledge of Diversification Strategies

Diversification can take many forms on a dairy farm. It may mean growing and marketing new products, such as specialty crops. It may mean adding value to the milk produced on the farm, as is done when making cheese or jugging milk. We asked dairy farmers to indicate their level of knowledge related to a number of alternative strategies for diversifying their dairy farms.

Table 2. Respondents' Level of Knowledge of Diversification Strategies

	Response (1 = Not Knowledgeable - 5 = Very Knowledgeable)					
Strategy	1	2	3	4	5	Mean
Farmers' markets	41.7	25.0	19.4	12.5	1.4	2.1
Jugging	59.7	20.8	13.9	5.6	0.0	1.7
Ice cream production	63.4	19.7	8.5	8.5	0.0	1.6
Cheese production	68.1	15.9	13.0	2.9	0.0	1.5
Specialty crop production	38.0	16.9	26.8	15.5	2.8	2.3
Direct marketing to restaurants	76.4	8.3	13.9	1.4	0.0	1.4
Direct marketing to grocery stores	66.7	12.5	15.3	4.2	1.4	1.6
Direct marketing to consumers	48.6	20.8	9.7	12.5	8.3	2.1
Community supported agriculture	43.7	16.9	31.0	7.0	1.4	2.1

The responding farms were generally not knowledgeable about some representative diversification strategies (Table 2). On a Likert scale ranging from 1 to 5 (1 = "not knowledgeable" and 5 = "very knowledgeable"), over two-thirds of respondents selected 1 or 2 for nearly all strategies. The exceptions were specialty crop production (54.9 percent chose 1 or 2) and community supported agriculture (60.6 percent chose 1 or 2). Although this is only a representative listing of potential diversification strategies, it appears that producer knowledge and understanding may represent a significant barrier to diversification.

Farmer Knowledge of Managerial Skills Needed to Diversify

Managing a diversified dairy business is significantly more complicated than managing a commodity-producing one. Although it is possible to do so, many farmers may not be willing to purchase inputs such as replacement heifers and feed, choosing instead to produce them on-farm as they are likely doing now. Thus, diversification for many represents additional enterprises with additional, and potentially very different, managerial needs. We assessed dairy farmers' knowledge about key managerial skills.

Not surprisingly, respondents ranked themselves as being relatively knowledgeable about managerial skills that may be critical in diversifying a dairy farm business (Table 3). Those skills that they are likely to be using currently, including accounting, ensuring a steady quantity and quality of product, and managing employees, tend to be more highly ranked than those that are probably not being used currently. Advertising, for example, has the highest percentage of responses of 1 or 2, indicating a low knowledge level.

Although managerial knowledge represents a lower barrier to diversifying a dairy farm, relatively few respondents indicated that they were very knowledgeable about any of these skills. Therefore, educational programs may be very useful in providing a deeper understanding of these key managerial skills as they relate to diversification strategies.

Table 3. Respondents' Level of Knowledge of Managerial Skills Needed to Diversify

	Response (1 = Not Knowledgeable - 5 = Very Knowledgeable)					
Skill	1	2	3	4	5	Mean
Advertising	31.0	36.6	19.7	8.5	4.2	2.2
Accounting	21.1	18.3	38.0	18.3	4.2	2.7
Customer Service	17.1	27.1	25.7	25.7	4.3	2.7
Ensuring steady product supply	8.5	21.1	31.0	32.4	7.0	3.1
Ensuring consistent quality product	5.7	22.9	25.7	31.4	14.3	3.3
Managing employees	14.3	25.7	34.3	14.3	11.4	2.8

General managerial skills are very beneficial for a dairy farmer attempting to diversify the operation. However, the benefits of this knowledge may be realized in the process of deciding whether or not to diversify. Although we did not ask specific questions about items such as enterprise budgeting and investment analysis, for instance, these skills are vital for well-informed decision making prior to implementing a diversification strategy.

Farmer Knowledge of Relevant Legal and Regulatory Issues

Diversification strategies of the type described here are subject to laws and regulations that may not apply to a commodity milk producer. Processing milk into ice cream or cheese, for instance, brings food safety issues into play. Opening a farm stand that allows visitors onto the farm increases the liability exposure. We asked a several questions about these issues to better understand the need for relevant educational offerings.

In general, dairy farmers are not knowledgeable about legal and regulatory issues that may affect a diversified dairy farm business (Table 4). This is not unexpected, given that the respondents have not been involved with a diversified dairy operation. Items such as food safety, facility inspections, and liability associated with farm visitors are relatively highly ranked, yet still display a low knowledge level. These issues, in some form, are faced by most commodity milk producers. Thus, many have some level of understanding of these issues as they apply to those businesses. However, they may be more important, or their application may be different, for some diversification strategies. As was shown with the other knowledge areas, it appears likely that farmer knowledge of legal/regulatory issues related to dairy farm diversification may be a barrier to diversifying the dairy farm.

Table 4. Respondents' Knowledge of Legal/Regulatory Issues Associated with Diversification

	Response (1 = Not Knowledgeable - 5 = Very Knowledgeable)					
Legal/Reg. Issue	1	2	3	4	5	Mean
Transportation regulations	43.1	33.3	12.5	8.3	2.8	1.9
Contracting	29.2	43.1	19.4	6.9	1.4	2.1
On-farm food processing	46.5	23.9	15.5	11.3	2.8	2.0
Food safety	31.0	23.9	18.3	21.1	5.6	2.5
Facility inspections	28.2	18.3	22.5	23.9	7.0	2.6
Liability (related to farm visitors)	25.0	16.7	34.7	18.1	5.6	2.6
Food labeling	40.3	36.1	15.3	6.9	1.4	1.9
Sales tax collection	36.6	22.5	19.7	11.3	9.9	2.4
Organic certification	41.7	20.8	18.1	15.3	4.2	2.2

Farmer Interest in Selected Extension Education Programs

Collectively, extension educators across the country offer programs designed to address each of the issues identified as a potential barrier to diversification. Food scientists offer education on safely producing food products. Business and marketing experts offer programs on business planning, marketing, financial management, and other types. Other experts offer programs addressing legal aspects of business management, growing fruits and vegetables, and transportation logistics. Yet farmers must demand these programs if they are to be successful. We asked respondents to indicate their interest in participating in different types of educational programs that may be useful in overcoming the barriers discussed previously.

The most strongly demanded programs related to those activities they are already involved in (Table 5). These include business management programs such as accounting, business planning, and financial management. There is also relatively strong interest in programs that provide education about legal/regulatory issues and risk management. There is the least amount of interest in programs that address diversification strategies, such as growing fruits and vegetables, developing a CSA or a farm stand, and advertising. We conclude, therefore, that the majority of dairy farmers, even those with smaller farms, choose to remain commodity producers. Despite being in the minority, however, there are many farmers interested in learning more about diversification strategies. Results show that 12.4 percent of respondents indicated an interest in learning about on-farm processing while 23.5 percent indicated an interest in learning more about organic production. These represent significant audiences for extension educators in Pennsylvania and other parts of the country. The results described here are consistent with research from Indiana that production and general management issues were most requested by extension clients (Marshall, Bush, and Hayes, 2005)

Table 5. Respondents' Interest in Attending Educational Programs

Program	Response (1 = Not Interested - 5 = Very Interested) 1	2	3	4	5	Mean
Financial management	16.4	16.4	23.9	22.4	20.9	3.2
Accounting	34.3	16.4	22.4	16.4	10.4	2.5
Financing a farm business	25.0	9.4	25.0	26.6	14.1	3.0
Business planning	26.9	19.4	20.9	20.9	11.9	2.7
Marketing	29.9	17.9	17.9	20.9	13.4	2.7
Advertising	40.0	23.1	20.0	12.3	4.6	2.2
On-farm processing (cheese & ice cream)	50.8	20.0	16.9	6.2	6.2	2.0
Growing vegetables	51.1	18.2	15.2	9.1	6.1	2.0
Growing fruits	55.2	19.4	13.4	6.0	6.0	1.9
Organizing a CSA	65.2	12.1	16.7	4.5	1.5	1.7
Developing a farm stand	57.6	9.1	24.2	4.5	4.5	1.9
Legal/regulatory issues	28.4	9.0	37.3	13.4	11.9	2.7
Managing employees	40.9	21.2	22.7	9.1	6.1	2.2
Risk management	31.3	16.4	25.4	20.9	6.0	2.5
Organic farming	42.6	14.7	19.1	13.2	10.3	2.3

Conclusions

Our analysis indicates that most dairy farmers have chosen not to pursue enterprise diversification as a means to strengthen farm profitability, and many feel that they do not have the knowledge or skills necessary to effectively diversify their operation. These findings suggest that there are significant opportunities for extension educators to train those who are further considering product-differentiating strategies. Business management and marketing topics would help producers make well-informed enterprise decisions through business plan development and implementation. Food processing and food safety programs would help them to safely and efficiently produce food products for either wholesale or retail markets. Additionally, these farmers generally look to extension educators for assistance. Sixty-three percent of respondents indicated that extension educators provide important input into their farm management decisions. These results suggest that there is a substantial group of farmers who may be looking to extension educators for education and input on selected diversification strategies.

Impact on Extension Educational Programming and Suggestions for Additional Research

Within Penn State Cooperative Extension exist several programs to address the educational programs that these dairy producers may demand. The Penn State Ice Cream Short Course is a nationally prominent program in which participants learn to produce and market ice cream products. On a smaller scale, programs such as Tilling the Soil of Opportunity, and Farm Services Agency (FSA) training programs provide education on business planning, financial management, financing a business, marketing, and more to producers of all sorts, including those dairy farmers interested in diversification.

There are holes in existing educational programs that could be filled either by cooperative extension or other providers. Topics such as legal and regulatory issues are generally not covered by attorneys, regulators, or others with the relevant expertise. Therefore, Penn State Extension educators have an opportunity to partner with the appropriate individuals in providing this education.

Additional research is needed to determine the means by which certain types of dairy farmers can be reached with educational programs. Many educators have seen a decline in demand for structured, class-like educational activities. However, clientele continue to indicate a demand for education in areas such as financial management, which is best learned through hands-on exercises. However, distance education techniques might be well received by this audience. Other topics that might be useful for a distance education setting are accounting, business planning and marketing, and fundamental production practices.

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Final Report

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By: The Food Trust

Background

Structural changes in the dairy industry, combined with consistently low milk prices, have driven many small dairy farmers out of business. Remaining farmers have been encouraged to increase production to achieve economies of scale. For a variety or reasons, growth is not always an option. Diversification is arguably a more reasonable strategy for many small producers.

The Food Trust, the Pennsylvania Department of Agriculture, and Penn State Cooperative extension have worked in partnership to facilitate this process by addressing two of the three issues listed under the 2004 FSMIP Program Scope and Eligibility Requirements: 1) Assessing customer response to new or alternative agricultural products, and evaluating potential opportunities for U.S. producers, processors, or agribusinesses, in domestic and international markets; and 2) Identifying problems and barriers in existing channels of trade and exploring improvements to marketing practices, facilities or systems to address such problems. Specifically the work of The Food Trust was to assess consumer demand for locally grown vegetables and specialty crops. Findings indicate that consumption of Pennsylvania grown, at least on the consumer side, is not yet maximized. Consumers express interest in more markets across the state, and in their communities. Current beliefs about markets are generally good; consumers believe they are fairly priced, and offer fresh food. In supermarkets, and other venues, there is a need to promote Pennsylvania grown produce, beyond current efforts. The majority of residents are not clear about how to know if an item is grown in Pennsylvania, and feel that promoting awareness would increase sales. Further investigation of the costs and benefits of a labeling campaign on Pennsylvania grown food is a strong recommendation from the findings of this consumer survey.

Associated Personnel – The Food Trust

Duane Perry (1%)	Founder (formally Executive Director)
Allison Karpyn (2%)	Director, Research and Evaluation

Evaluation of Accomplishments toward Achieving Objectives

As noted in the revised work plan (October 28th, 2004), the primary objective of the Food Trust component of work was to assess consumer demand for locally produced vegetables and specialty crops. The objective was accomplished as written.
In November 2005, a consumer poll (n=401) of five counties (Bucks, Montgomery, Delaware, Philadelphia, Chester) was conducted.
Questions asked about current shopping habits, why respondents shopped or did not shop at farmers' markets, how they perceived the prices at farmers' markets, if they were aware of Pennsylvania grown products, how they felt about Pennsylvania grown products, and if they would like more farmers' markets in Pennsylvania and in Center City Philadelphia. Questions for the entire sample contain a sample error of approximately 5% (95% confidence). Sample errors for the sub-sample of Philadelphia

residents (n=114) is approximately 9%. A summary of findings for each of the core components of the survey are provided below.

Attitudes and Perceptions of Farmer's Markets

In the past month, about one-third of those polled reported shopping at a farmers' market. The farmers' market appeal for shoppers lies in its ability to provide fresher local produce (73%), at reasonable prices (15%). Those not shopping at farmers' markets do so primarily because they are located too far away from home or work (64%). Eight out of ten surveyed indicated that they would like to see more farmers' markets in Pennsylvania. Price is an important issue for consumers, but the findings confirm that cost is not a significant perceptual barrier to people when it comes to farmers' markets. Many area residents believe that the prices at farmers' markets are slightly lower than at grocery stores (43%), while 10% believe that the prices at farmers' markets are much less. Very few perceive the markets as a high-cost option.

Center City Market

An analysis of the sub-sample of Philadelphia residents was conducted to assess preferences for or against a large, seasonal outdoor farmers' market in Center City Philadelphia. Approximately 93% of those surveyed would like to see a large, seasonal outdoor farmers' market established in Center City Philadelphia.

Attitudes and Perceptions of Pennsylvania Grown Food

Survey results indicate that five county area residents want to purchase more foods grown in Pennsylvania, but are unaware of what products are from the state.

Eighty-percent of residents polled would like to purchase more food grown in Pennsylvania and 78% reported that they would be more likely to purchase food from Pennsylvania if it had a label identifying it as having been grown in the state. More than 50% found it difficult to know if a product was grown in Pennsylvania, and another 20% reported not knowing enough to answer the question.

Despite the expressed interest in purchasing more food grown in Pennsylvania, it is also clear that residents have variable beliefs about the importance of buying Pennsylvania grown food. Forty-percent of residents expressed that buying Pennsylvania grown was important or somewhat important, while the majority, 60%, did not believe that it was important.

Distribution List of Publications

For the final report on the consumer survey/dairy farmer grant we produced 1,000 copies of a printed, colorful promotional piece that highlights key findings from the consumer survey. We printed 1,000 copies of this which will be used in meeting and presentations with policymakers about local food. The flyers will also be distributed to supermarket operators. The goal is to influence the thinking of both policymakers and industry that people will seek out Pennsylvania food products if they are identified as coming from PA. The promotional piece is part of a strategy to raise awareness that consumers are interested and enthusiastic about buying PA products and will do so when they are available and identified.

Benefit Statement

In addition to fostering communication between partners, this project has allowed important insight into the consumer perspective on local food. In many was the connection between urban and rural communities is strained, with older communities and rural towns becoming threatened by suburban sprawl. This initiative has provided important insight for the marketing of new products establishing a baseline for purchasing of local products, interest in purchasing these products, access, as well as perceptions. In addition to serving the interests of local dairy farmers the program has informed programs and projects with interest in promoting local foods. Findings show that there are strong existing preferences for local food, but because there is limited advertising at the point of sale depicting what is local, limits purchases. Furthermore, it is clear that the critical selling point of local is freshness. Other potential selling points such as disease, knowing the farmers, variety and community were examined, with freshness sailing to the top of the list in terms of reasons to buy local. In response to this work, and the data that the work provided, supplemental funding to promote local foods has been solicited from private foundations as well as public sources in order to respond to the need for increased marketing, targeted at the point of sale.

APPENDIX A

Hello, my name is [INSERT NAME] and I'm calling from Terry Madonna Research, a professional research company. We are conducting a survey about people's grocery shopping habits and I was hoping to ask you a few questions. First, so that our data is scientifically valid, we need to randomly sample someone within your household to interview. Could I please speak to the adult in the household who MOST RECENTLY celebrated a birthday?

[ONCE PROPER RESPONDENT IS ON THE TELEPHONE, BEGIN THE INTERVIEW—IF PROPER RESPONDENT IS UNAVAILABLE, SCHEDULE A TIME TO CALL BACK]

1. How often did you shop for groceries last month? Number of Trips: ________

2. In the last month, how many times did you purchase food from a farmer's market? Number of Purchases: __________

3. **[IF SHOPPED AT Farmer's Market in past month]** What is the main reason you shop at a farmer's market?

4. **[IF DOES NOT SHOP AT Farmer's Market]** What is the main reason you do not shop at a farmer's market more often?

5. How difficult or easy is it to know whether a food or food product you are shopping for is grown in Pennsylvania? Is it

    1. very difficult,
    2. somewhat difficult,
    3. somewhat easy,
    4. or very easy?
    8. Don't know

6. How important is it to know whether a food or food product you are shopping for was grown in Pennsylvania? Is it

    1. very important,
    2. somewhat important,
    3. not very important,
    4. or not important at all?
    8. Don't know

7. When you go grocery shopping, how often do you look specifically to purchase foods that are grown or produced in the state of Pennsylvania?

    1. frequently,
    2. sometimes,
    3. seldom
    4. or never?
    8. Don't know

8. Would you like to be able to purchase more food grown in Pennsylvania at your local supermarket, or not?

    1. Yes
    2. No
    8. Don't know

9. As far as you know, do foods or food products produced in Pennsylvania come with labels that will tell you it was grown or produced in the state?

1. Yes
2. No
8. Don't know

10. Would you be any more likely to purchase food that had a label indicating it was grown in Pennsylvania, or not?
1. Yes
2. No
8. Don't know

11. Now I'd like to ask you a few questions about farmers markets. Would you expect to pay more, less or the same for food purchased at a farmers market as compared to food purchased at a grocery store? Is that much or somewhat [more/less]?
1. Much more
2. Somewhat more
3. Somewhat less
4. Much less
8. Don't know

12. Do you think there should be a greater number of farmers markets in Pennsylvania, or not?
1. Yes
2. No
8. Don't know

13. Do you think there should be a large, seasonal outdoor farmers market established in center-city Philadelphia, or not?
1. Yes
2. No
8. Don't know

REG. Now I have a few questions for statistical purposes only. First, are you currently registered to vote at your present address?
1. Yes
2. No **[GO TO CNTY]**
8. Don't know **[GO TO CNTY]**

PRTY. [**IF REGISTERED**] Are you currently registered as a Republican, a Democrat, and Independent, or something else?
1. Republican
2. Democrat
3. Independent/other
8. Don't know

CNTY. What is the name of the county you live in? ____

AGE. What was your age on your last birthday? _____________ years

EDUC. What is the highest grade level of education you have completed?
1. Less than high school
2. High school
3. Some college or technical school
4. Four year college
5. Postgraduate
8. Don't know

HHS. How many adults 18 years of age or older are currently living in your home? _______________ adults
Please include yourself, but do not include any children away at college or in the military.

CHLD. Do you have any children under the age of 18 living in your home?
1. Yes
2. No
8. Don't know

MAR. What is your current marital status? Are you married, single, divorced/separated, or widowed?
1. Married
2. Single
3. Divorced/separated
4. Widowed
8. Don't know

RACE. Is your racial background white, African-American, Asian, American Indian, or something else?
1. White
2. African American
3. Other
8. Don't know

OHOM. Does your family own your home or rent a house or an apartment?
1. Own home
2. Rents
8. Don't know

INC. Finally, just for statistical purposes, we need to know if your total family income is above or below $50,000 per year?
1. Below $50,000 per year
2. Above $50,000 per year
8. Don't know

Sex will be noted
1. Male
2. Female