2002 Minnesota State Fair Consumer Survey

Conducted by:
Minnesota Department of Agriculture
Tina Werk and Paul Hugunin

In cooperation with:
Minnesota Christmas Tree Association

Funding assistance provided by a grant from the USDA Federal/ State Market Improvement Program.

Objectives:

The objective of this survey was to provide consumer research that could assist Christmas tree growers in making future tree production and marketing decisions. Where applicable, data in this study will be compared to the information contained in a 1997 consumer survey conducted by the Minnesota Department of Agriculture at the Minnesota State Fair. Assistance for this survey was provided by a grant from the USDA Federal/ State Market Improvement Program.

Methodology:

This survey was conducted by the Minnesota Department of Agriculture, Ag Marketing Services Division during the 2002 Minnesota State Fair in cooperation with the Minnesota Christmas Tree Growers Association. The survey consisted of three sections:

(1) General Christmas tree preferences
(2) Exotic variety preferences
(3) Personal demographic questions.

Three members of the Minnesota Department of Agriculture (MDA) Ag Marketing Services Division (Paul Hugunin, Ag Marketing Specialist, Sr, Brian Erickson, Ag Marketing Specialist, Sr., and Tina Werk, Student Worker) conducted one-on-one interviews with consumers. A total of 180 surveys were completed over a five day period. The average survey took between five and ten minutes to complete.

Demographics of Survey Respondents

The demographics of the consumers surveyed at the State Fair are illustrated in the tables below. The "average" consumer surveyed was a female between the ages of 35 and 55 years old who lives in the 11 county metropolitan area. This average consumer owns a home and has an annual household income above $70,000.

Location:	2002	1997
Metro Area	74%	59.6
Southeast	9%	NA
Northeast	7%	NA
Southwest	4%	NA
Northeast	4%	NA
Total out-state	24%	24%
No Response	NA	16.4%

Gender:	2002	1997
Female	58%	85%
Male	22%	15%
Responded as group	16%	NA
No Response	4%	NA

Age:	2002	1997
18-25	11%	2%
26-35	17%	10%
36-45	29%	38%
46-55	27%	24%
56-65	12%	14%
Over 66	4%	6%
No Response	1%	6%

Income:	2002	1997
Under 20K	6%	2%
20K-29K	7%	6%
30K- 39K	6%	15%
40K- 49K	11%	10%
50K- 59K	6%	13%
60K- 69K	6%	16%
70K- 79K	8%	25%
80K- 89K	12%	NA
90K-99K	7%	NA
Over 100K	16%	NA
No Response	17%	13%

Home:	2002	1997
Own	80%	91%
Rent	20%	9%

Marital Status:	2002	1997
Married	57%	61%
Single	23%	39%
No response/other	20%	NA

Children:	2002	1997
Living at home	37%	70%
No longer at home	44%	30%
No Response/other	20%	NA

Research Bias:

There are a few conditions of the survey that potentially create a bias to the results. The individuals that were approached were not completely chosen at random. For example, elderly people were less likely to be surveyed than people who were with children. Potential bias was also created through the location; the surveys needed to be conducted with live trees so the logical place to host the survey was the Minnesota Christmas Tree Growers Association Exhibit. This location is more likely to attract people who are favorably disposed to real trees than a random sample of the general public.

Real vs. Artificial:

The percentage of households purchasing real Christmas trees in 2002 appears to be very similar to 1997. Overall, there was a slight increase in the number of consumers who purchased a real tree, a decline in artificial tree usage and a doubling of the percentage of households who had both a real tree and an artificial tree.

Type of tree*	1997	2002
Real	62%	65%
Artificial	33%	25%
Both	5%	11%
Total	**100%**	**101%**

**Of those respondents who used a Christmas tree in their home in 2002.*

The individual interviews with the consumers revealed that the top reasons for purchasing a real Christmas tree are:
(1) Fragrance
(2) Tradition
(3) Family activity

There are a growing number of households that choose not to have a Christmas tree. In a survey conducted by the National Christmas Tree Association in 1998, 23% of households reported having no tree. According to the 2002 State Fair Survey, 10% of the Minnesotans surveyed did not purchase a tree in 2001. The main reason for not purchasing a tree cited by the Minnesota survey respondents is that they travel away from home during the holiday season.

Why Consumers Purchased Real Trees in 2002*

Comment	1st Reason	2nd Reason	3rd Reason	Total
Fragrance	60	10	2	72
Tradition	35	14	1	50
Fun activity	2	6	-	8
Fresh/natural/real	2	4	-	5
Grown at home	4	-	-	4
Appearance	1	1	-	2
Advertising	1	-	-	1
Easier than artificial	1	-	-	1
No storage	1	-	-	1
Replanting of real trees	1	-	-	1
Cost	-	1	-	1
Habitat for wildlife	-	1	-	1
Less commercial	-	1	-	1
TOTAL	**108**	**38**	**3**	**149**

****Interviewers recorded the first three responses in the order given by the respondent.***

Why consumers use a real tree AND an artificial tree simultaneously

Comment	Responses
Prefer two real trees but want convenience of artificial tree for 2nd tree	13
To accommodate more ornaments	2
Size of the artificial tree allows 2nd tree	2
Total	**17**

Why no tree was purchased

Comment	Responses
Not home, traveling	6
Small house, no room	3
Too expensive	2
Too busy	2
No entertaining	1
Death in the family	1
Allergies	1
TOTAL	**16**

Why consumers chose artificial trees

Reasons	1st Reponse	2nd Response	Total
Convenience	10		8
Mess / needles of real trees	6	2	8
Cost	5	2	7
Allergies	7	-	7
Don't like picking one out	5	-	5
Fire concerns	3	2	5
Too busy to pick out real tree	3	1	4
Live in apartment	4	-	4
Move a lot	1	1	2
Out of town for holidays	-	2	2
Don't want to cut down trees	2	-	2
Like to keep a tree up for a long time	2	-	2
Space	2	-	2
No events to host	2	-	2
No family at home	1	-	1
Young children at home	1	-	1
TOTAL	**54**	**10**	**64**

Place/ Price Results:

Somewhat surprisingly, respondents who purchased at a choose and cut farm reported paying almost as much as respondents who visited a retail lot. Normally, pre-cut trees are more expensive. This could be attributed to the fact that the surveys were conducted in August, nearly nine months after the actual purchase. It could also be the result of people purchasing real trees at relatively inexpensive precut lots associated with "big box" retailers such as Home Depot and Menards. The average price paid was higher than the price reported during the 1997 State Fair survey.

Place of Purchase	
Retail Lot	56%
Choose & Cut	39%
Other/ No Response	5%

Location	**Avg. Price**
Retail Lot	$35.60
Choose & Cut	$34.34
Overall Average	**$35.13**

Price	**2002**	**1997**
$0-$9	8%	
$10-$15	7%	
$16-$20	11%	(17% $0-$20)
$21-$30	26%	32%
$31-$40	27%	13%
$41-$50	20%	8%
$51-$60	7%	4%
Over $61	3%	2%
No Response	--	20%

Exotic Variety Preferences:

The surveys conducted at the State Fair provide a glimpse into how consumers might react to the availability of exotic varieties. Consumers were shown six, side-by-side, unmarked trees that included a combination of exotic species and traditional varieties. They were asked to decide which one they would be most likely to purchase and the one they would be least likely to purchase. They were also asked for reasons supporting their choice.

There are many challenges to conducting this type of survey. The first was to find exotic species that had reached market height. The corkbark and Korean trees were brought in from other states since none could be located within Minnesota. Because it was difficult to find market height trees, it was also difficult to find trees of similar density. Another challenge resulted from the fact that the State Fair occurs over 2 months prior to the normal start of the marketing year so some trees have a slightly different color than they would in another two months. Despite these limitations, the survey did provide some relevant feedback for growers that will help them make sound planning decisions.

Of the trees offered for comparison, the Improved Balsam was by far the most frequently chosen variety. The Bracted Balsam was least commonly chosen. This result leads to many interesting observations. The two trees are of the same breed; however the characteristics that set them apart in the minds of the consumer were related to density and shape rather than varietal issues such as needle length, color and texture. This may be the result of differences among the individual tree offered for comparison rather than the species of tree.

The primary factors used by consumers when selecting a tree are shape, color, and needle structure. Even though these six trees contained significant differences within these attributes, the criteria was the same for the majority of consumers surveyed. For example, density is a key factor for most Christmas tree purchasers. However, some prefer a very dense tree while others prefer a more loosely sheared tree.

Variety	Most likely to be purchased	Least likely to be purchased
Bracted Balsam	10/179 (6%)	16/177 (9%)
Improved Balsam	79/179 (44%)	1/177 (1%)
Canaan	14/179 (8%)	25/177 (14%)
Corkbark	19/179 (11%)	40/177 (23%)
Fraser	38/179 (21%)	8/177 (5%)
Korean	19/179 (11%)	87/177 (49%)
Total	***100%***	***100%***

Varieties Most Likely to be Purchased

Reasons Bracted Balsam was most likely to be purchased	
Shape	3
Openness	3
Color	2
Needle type	1

Reasons Improved Balsam was most likely to be purchased	
Density	33
Shape	20
Color	16
Natural looking	7
Needle length	5
Soft needles	5
Stable branches	1

Reasons Canaan Fir
<u>was most likely to be purchased</u>

Color	8
Shape	5
Needle Length	4
Soft needles	3
Fullness	2
Density	2

Reasons Corkbark
<u>was most likely to be purchased</u>

Needle length	5
Natural look	5
Color	4
Openness	2
Not too full	2
More Branches	1
Healthy	1
Unique	1
Looks elegant	1
Shape	1
Soft branches	1

Reasons Fraser Fir
<u>was most likely to be purchased</u>

Color	12
Shape	8
Strong branches	5
Space to hang ornaments	4
Needles on entire branch	3
Soft needles	1
Smell	1
Short needles	1
Natural look	1

Reasons Korean Fir
<u>was most likely to be purchased</u>

Color	10
Needle shape	5
Soft needles	4
Uniqueness	3
Shape	1
Density	1

Varieties Least Likely to be Purchased

Reasons Bracted Balsam was least likely to be purchased	
Needles to short	4
Open Spaces	6
Color	2
Shape	3
Weak branches	2

Reasons Improved Balsam was least likely to be purchased	
Not as full	1

Reasons Canaan Fir was least likely to be purchased	
Color	7
Flimsy	3
Sharp needles	3
Needle density	3
Looks plastic	1
Needle length	1
Shape	1

Reasons Corkbark was least likely to be purchased	
Not full enough	18
Blue Color	5
Longer needles	4
Flat Branches/Needles	3
Weak Branches	2
Needles don't form all the way around the branch	1
Needles Sharp	1

Reasons Fraser Fir was least likely to be purchased	
Size	2
Shape	2
Too uniform	1
Sharp needles	1
Needles are too close	1

Reasons Korean Fir was least likely to be purchased	
Color	46
Looks fake/artificial	16
Looks like a shrub/bush	12
Non-traditional looking	9
Shape	6
Flimsy	5
Needles are too far apart	2
Texture	1
Needle length	1

Cross Tabulations:

A variety of cross tabulations were conducted to determine if there was any correlation between the types of exotic trees survey respondents preferred and their demographics. There was no significant evidence that age, consumption behavior, income, gender or marital status influence the preferences that consumers made in this survey.

Most Likely to Purchase vs. Age

Variety	18-25	26-35	36-45	46-55	56-65	over 66	Total
Corkbark	1	3	2	7	6	-	19
Improved Balsam	10	15	23	19	9	3	79
Korean	3	2	5	5	2	1	18
Bracted Balsam	1	1	3	3	1	1	10
Canaan	1	1	7	5	-	-	14
Fraser	3	9	11	9	4	2	38
Total	19	31	52	48	22	7	179

Most Likely to Purchase vs. 2001 Tree Choice

Variety	Real	Artificial	Both	No Tree	Total
Corkbark	9	6	2	2	19
Improved Balsam	49	13	9	8	79
Korean	9	3	2	5	19
Bracted Balsam	5	5	-	-	10
Canaan	8	5	1	-	14
Fraser	25	7	3	3	38
Total	**105**	**39**	**17**	**18**	**179**

Most Likely to Purchase vs. Income

Varieties	< 20K	20K-29K	30K-39K	40K-49K	50K-59K	60K-69K	70K-79K	80K-89K	90K-99K	100K and >	NR	Total
Corkbark	1	1	-	2	2	1	1	4	-	2	5	19
Improved Balsam	3	7	6	11	3	3	5	12	9	13	6	77
Korean	1	2	-	1	2	2	1	1	1	5	2	18
Bracted Balsam	-	1	-	2	-	1	1	-	1	2	2	10
Canaan Fir	1	-	3	1	2	1	-	2	-	3	1	14
Fraser Fir	3	1	1	5	3	3	6	3	2	4	7	38
Total	**9**	**12**	**10**	**22**	**12**	**11**	**14**	**22**	**13**	**29**	**23**	**177**

Most Likely to Purchase vs. Gender

Varieties	Female	Male	Both	Total
Corkbark	10	5	4	19
Improved Balsam	46	18	14	77
Korean	14	3	2	19
Bracted Balsam	9	1	-	10
Canaan Fir	7	4	2	13
Fraser Fir	20	10	6	36
Total	**107**	**41**	**28**	**175**

Most Likely to Purchase vs. Marital Status

Varieties	Single	Married	Other	Total
Corkbark	8	10	-	18
Improved Balsam	16	49	1	66
Korean	5	10	1	16
Bracted Balsam	4	1	-	5
Canaan Fir	2	8	-	10
Fraser Fir	6	24	-	30
Total	**42**	**102**	**2**	**145**