

LIVESTOCK PRODUCERS
CUSTOMER SATISFACTION
RESEARCH RESULTS

2018



Livestock Producer Customer Satisfaction Research Project Results 2018



Brought to you by the Minnesota Department of Agriculture and the Minnesota Grown Program. Funding for the Farmers Market Customer Satisfaction Research Project Results 2018 was made possible by the U.S. Department of Agriculture's (USDA) Agricultural Marketing Service through grant No. 16-FSMIP-MN-0005. Its contents are solely the responsibility of the authors and do not necessarily represent the official views of the USDA.

Project Background

This inaugural research project was conducted by the Minnesota Grown Program at the Minnesota Department of Agriculture in early 2018. Customers were surveyed about their experiences and opinions as customers of one of the **13 participating livestock producers** across Minnesota, the equivalent of **7% of all livestock producers** in Minnesota Grown. A total of **312 customers returned surveys!**

Livestock producers eligible for this project were Minnesota Grown members who market directly to the end consumer and were recruited through various means including:

- Articles in Member Update, a monthly member newsletter for Minnesota Grown Program members
- Calls to farms to ensure awareness of the opportunity
- Conversations and presentations at association conferences and trade shows
- Emails sent directly to Minnesota Grown members
- Emails via listserves, such as SustAg, etc.
- Word of mouth

The Basics

13 participating farms

= **7% of all livestock producers** in Minnesota Grown Program

A total of **312 customers returned surveys.**



Help us improve & enter to win a \$25 credit!

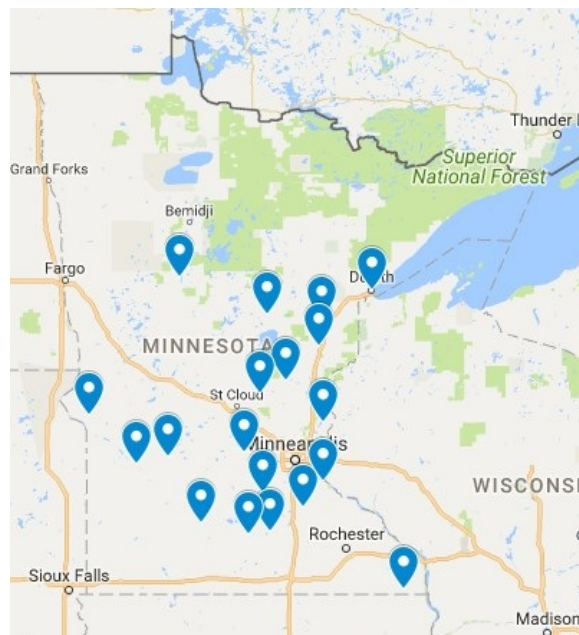
Tell us about your experience with **[business name]** by taking an online survey.

Take the survey at **[URL]** and thank you!



Customers received cards, like the one above, with their livestock orders or they received the same information from the producers via email. Every livestock producer had a unique URL to direct customers to their livestock producer's online survey. They then answered a series of survey questions. The survey was voluntary. A \$25 credit incentive per livestock producer was offered and one winner per producer was selected at random. This report is a summary of their feedback across all producers surveyed.

Livestock Producer Profile



- 0 to 20+ years' experience
- Mix of livestock producers: Beef, pork, chicken, eggs, lamb, elk, yak, beefalo, and sheep and alpaca products.

The livestock producers were a diverse group from across Minnesota. They varied in years of experience, mix of livestock raised, and products.

Customer Age Comparisons ([based on past customer research](#))

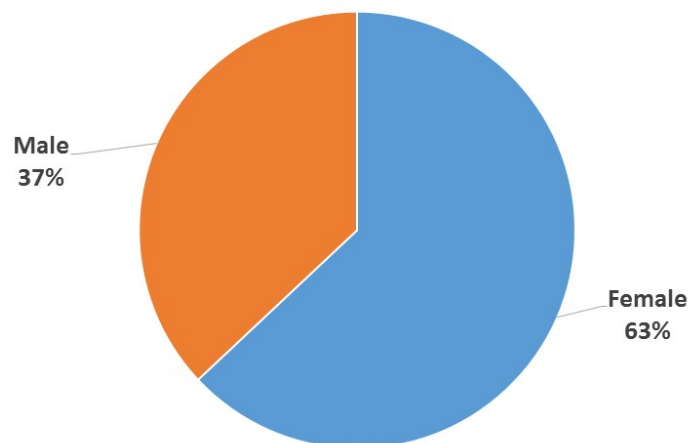
This is one of eight studies making up a family of customer satisfaction projects. The projects include apple, berry, Christmas tree growers, farmers markets, CSAs, livestock producers, meat processors, and garden centers.

The research measures customer satisfaction to assist direct market farms, growers/producers, processors, and farmers markets statewide in better serving their customers. The information provided assists all in becoming more effective marketers, understanding their customers better, and improving services and sales.

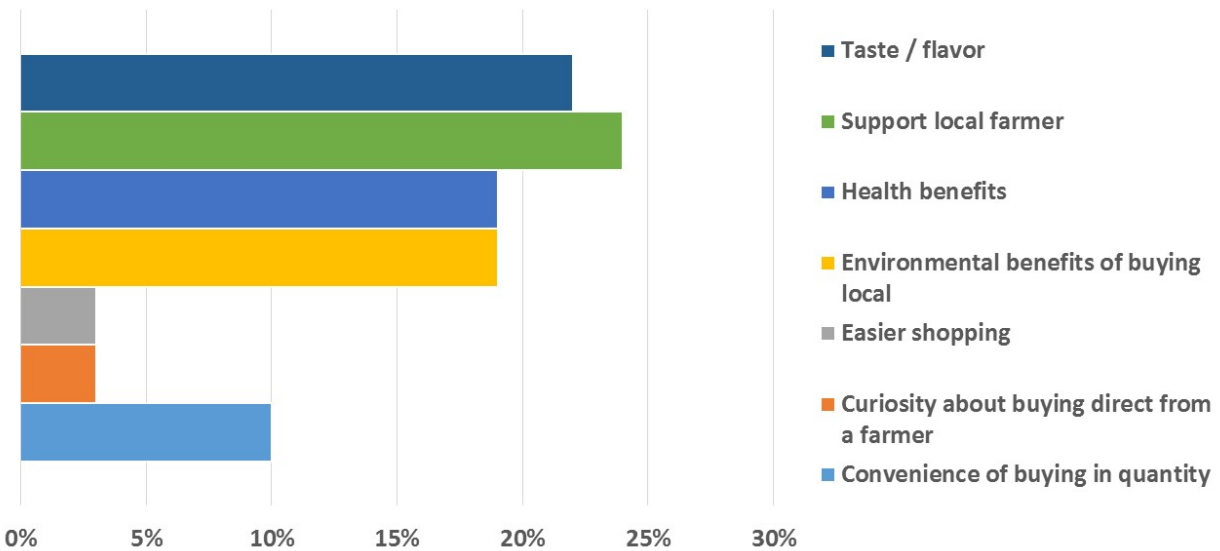
Other surveys have given us the opportunity to consider the average age of customers for various products. Livestock producers are one of the older groups of customers in comparison to other locally grown items we've studied.

- CSAs average age = 47 years old
- Apples average age = 47 years old
- Berries average age = 49 years old
- Christmas trees average age = 48 years old
- Farmers markets average age = 51 years old
- Livestock producers average age = 51 years old (47 years old for first time customers)

Who are your customers?



Why do you buy direct from a farmer instead of a store?



People could select as many reasons as they'd like. Most people buy direct to support local farmers and because of taste / flavor of their purchases. The majority of the comments mentioned cost, animal care, buying local, quality, and the value of a personal relationship with the livestock producer.

Customer Quotes

"Knowing more about the farming practices used and supporting local economy."

"We want to choose carefully about where we spend our money."

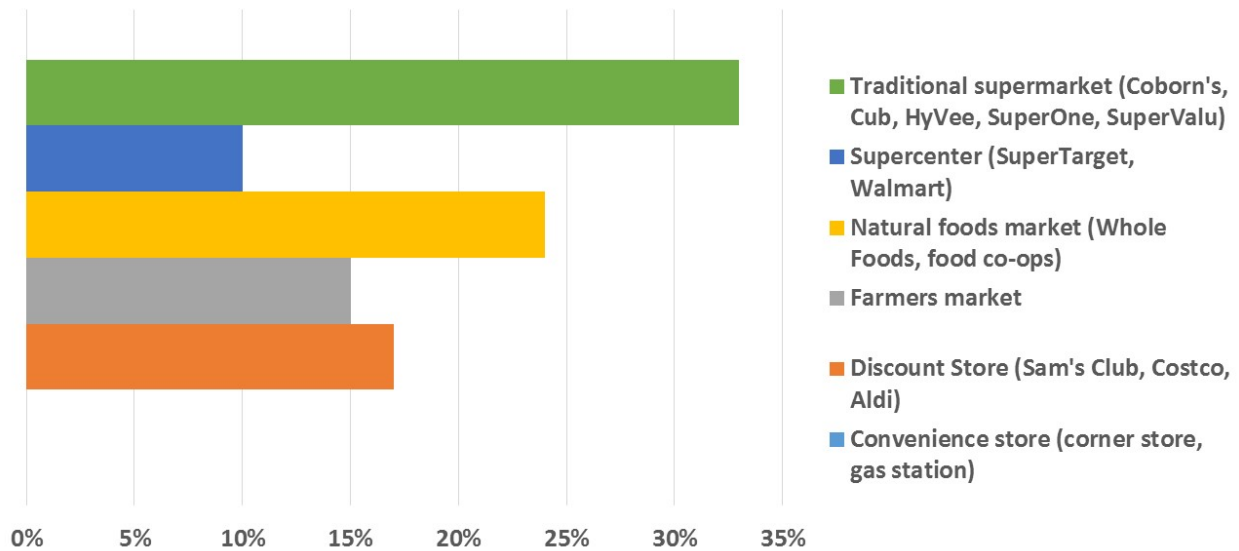
"To establish a personal relationship with those who produce my food."

"Like the humane animal treatment including the quality feed given animals."

"Ethical treatment of animals, sustainable practices. Tail to snout."

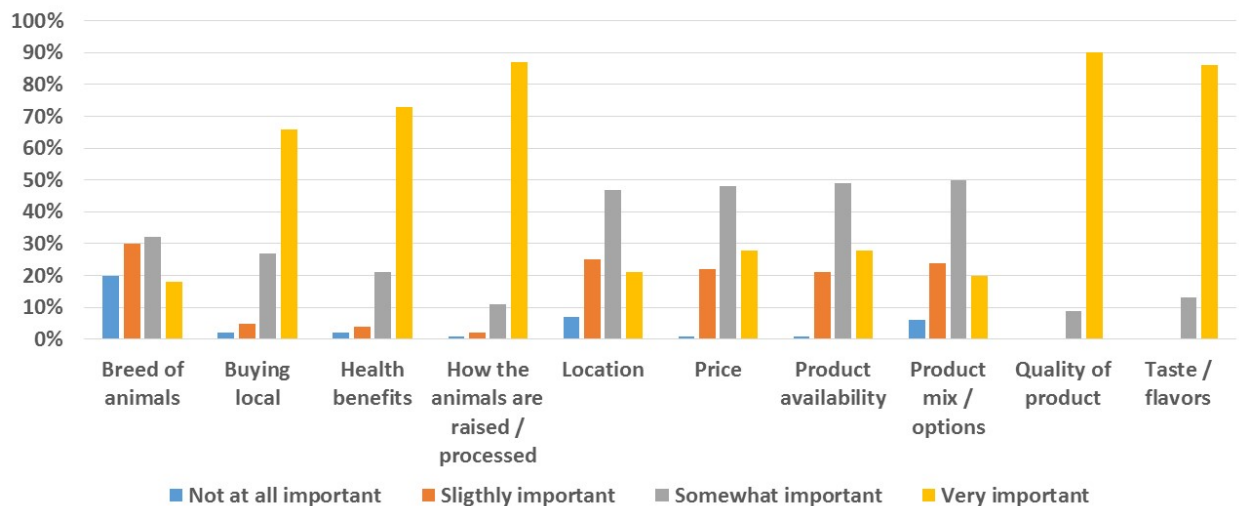
"Better quality, taste and fat content, also a small local."

During a typical month, where else do you purchase your livestock products?



Roughly a third of the customers purchase their livestock products at traditional supermarkets and nearly 25% purchase them at natural foods markets. Also mentioned in the comments were other farmers, and meat markets/lockers.

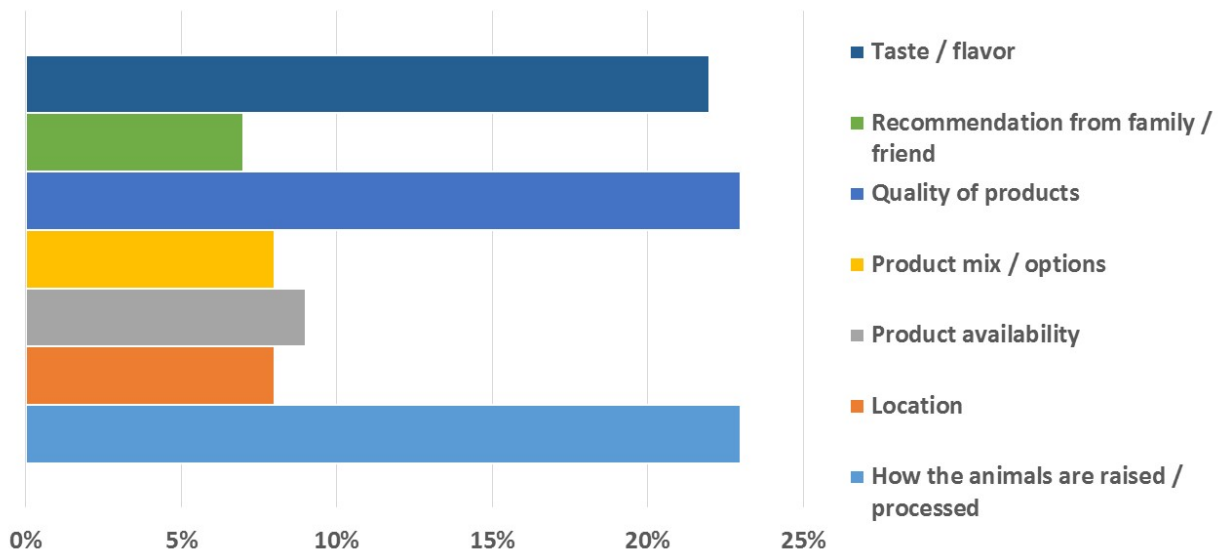
When choosing between livestock producers who offer similar products, how important are the following in your final decision to buy?



Customers were permitted to select all applicable answers regarding choosing between livestock producers offering similar products. By far, the quality of product, taste / flavor of the product, and how the animals are raised / processed led the pack, but were closely followed by health benefits and the desire to buy local.

Interestingly, this survey seemed to trigger several customers to ask in the comments section about what breed of animals their livestock producers had.

Why do you buy from us?



Specific to their livestock producers, customers mentioned how the animals are raised / processed, the quality of products, and the taste / flavor as the leading reasons to buy from their producers. Overall, their comments were similar to why they buy direct from a farmer.

Customer Quotes

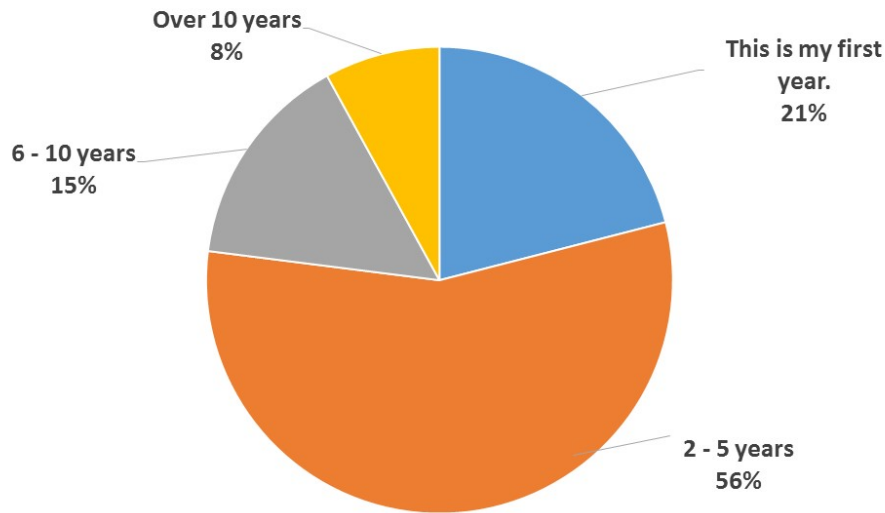
"Personal relationship, high confidence in practices farmer uses."

"Trust (Vision, Values, Mission and Execution of all of these in your products)"

"We have always thought the quality, taste/tenderness & service is #1."

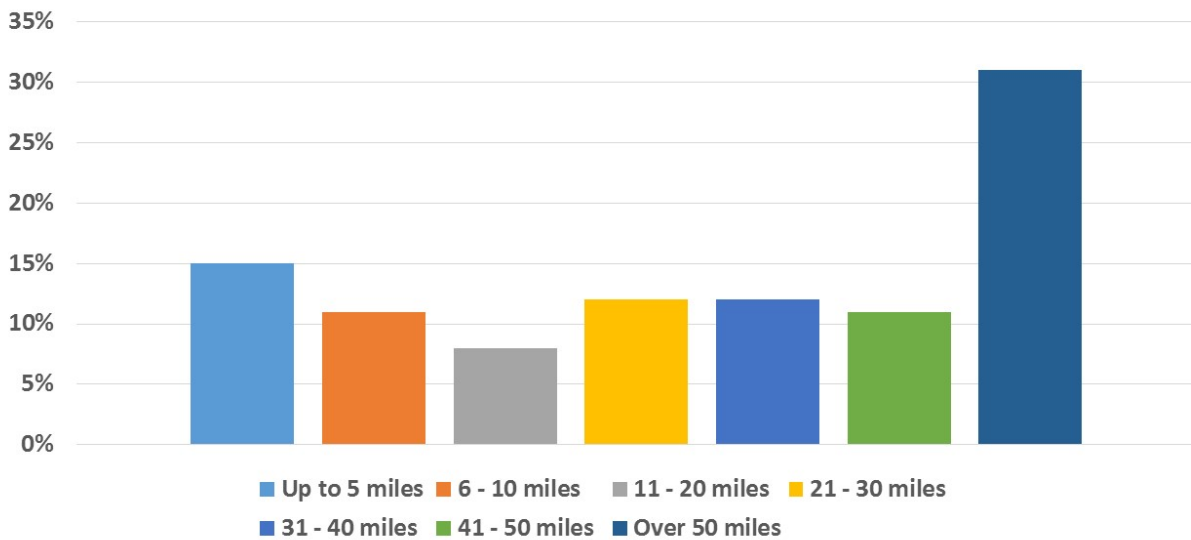
"I can literally see the cows; I can ask how they are treated, killed, processed."

How long have you bought from us?



On average, customers have been buying from their livestock producers for about 4 years. Over half of the customers have been buying from their livestock producers for two to five years and nearly a quarter are new customers. Throughout this report, we have noted any interesting first time customer findings.

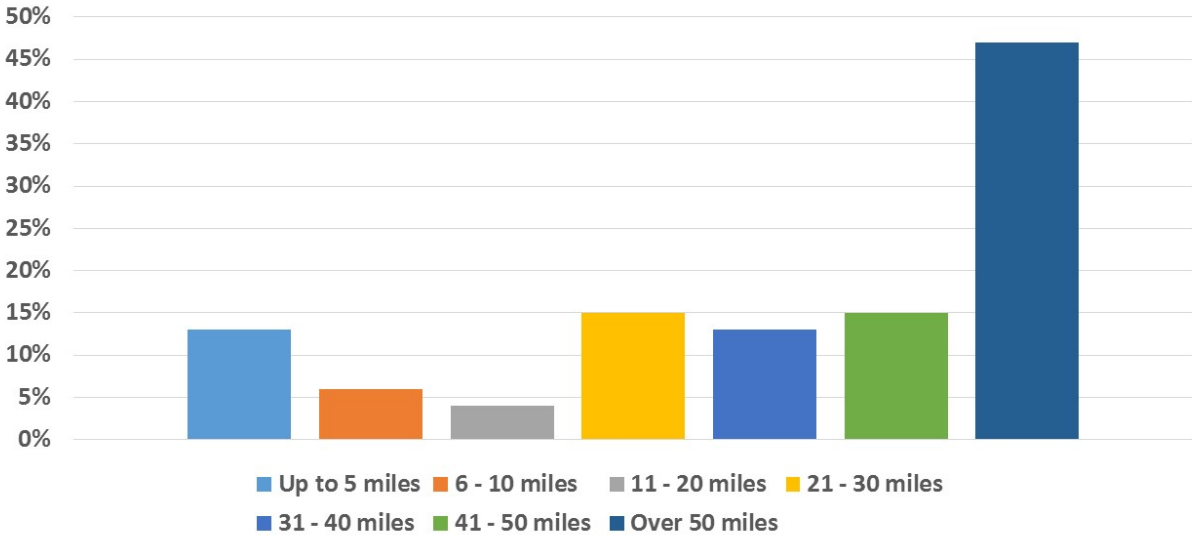
How far do you travel to buy our products?



Over a third of the customers traveled 50+ miles to purchase livestock products. This range is significant when considering the best methods of marketing livestock products to existing and new customers,

particularly since recommendations by family and friends play the strongest role in attracting customers. On average, customers drive 31 miles to purchase livestock products.

How far do you travel to buy our products? (1st timers)



Nearly half of all first timers are traveling over 50 miles for livestock products. First time customers on average, travel 36 miles for their livestock products.

What did you buy today?





On average, customers spent \$451.45 and first time customers spent \$498.55.

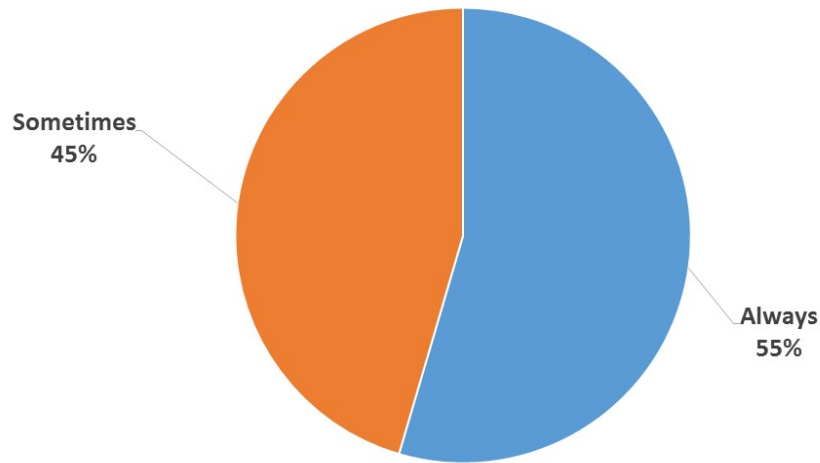
Customers spent \$451.45 on average. First time customers spent \$498.55 on average.



**Quality of Products
8.9**

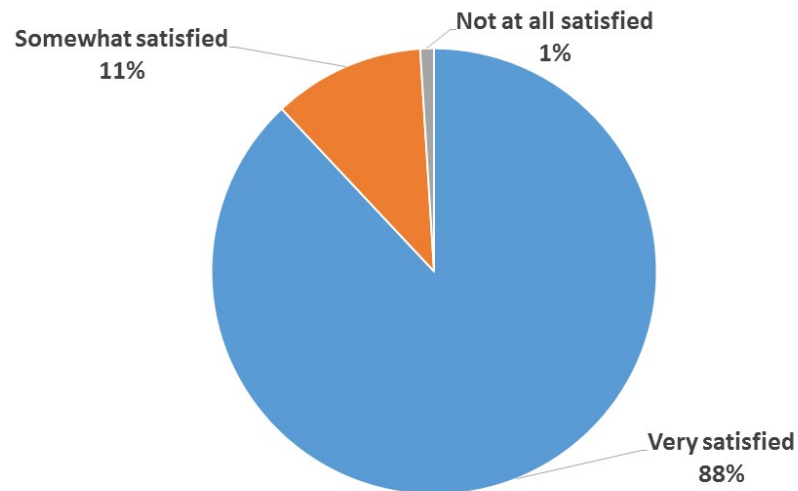
The quality of products rated an 8.9 on a scale of 1 to 10.

Is product available when you want to purchase it?



The variety of products rated 8.7 on a scale of 1 to 10.

How satisfied are you by current packaging size options?



The majority of customers are very satisfied with current packaging size options. Those who were not satisfied mentioned smaller packaging options, and concerns with processing of the product.

Customer Quotes

“Good for family of 2. Easier to add extra packages for more people than to break down a large package to smaller portions.”

“I think that only change that would be nice is if the bacon came in like a 1/4 or 1/2 lbs package so you could just pull out enough for one meal.”

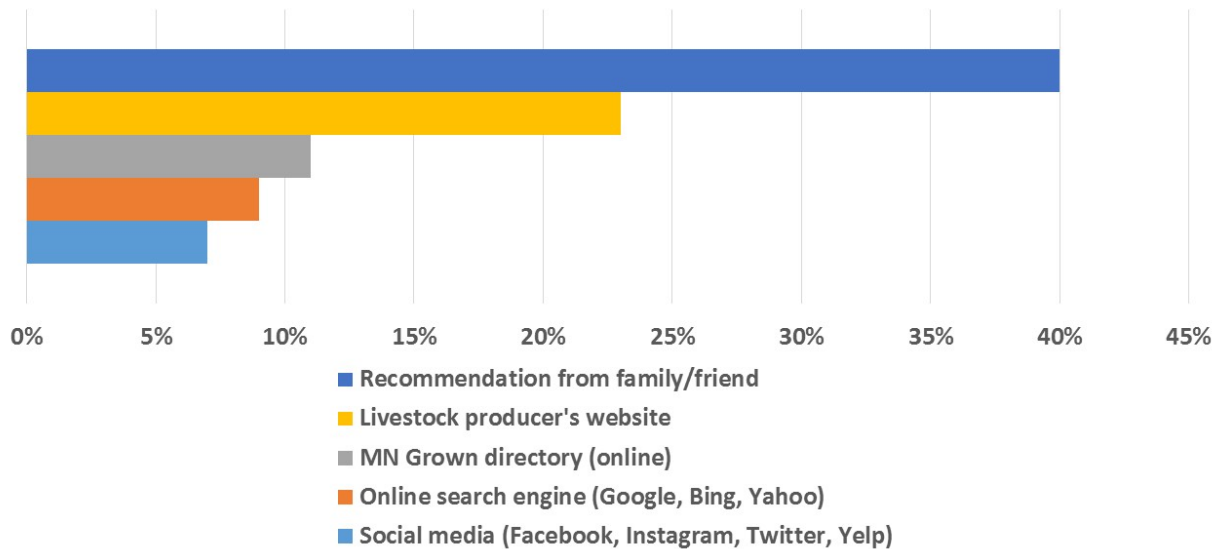
“I like the smaller package option. Gives a person more flexibility when preparing.”

“Unimpressed with processing options not directly related to farm but would cause me to look elsewhere.”

“Wish chicken liver came in smaller packages. I would buy more if it did. I'm the only one in our household that eats it but I do so 2 to 3 times a week.”

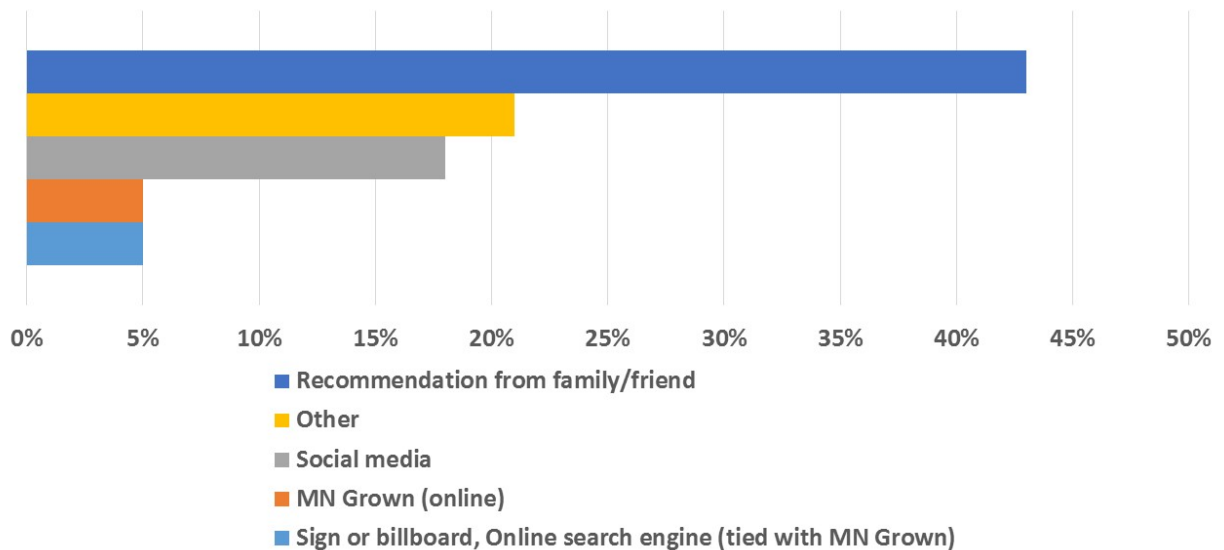
“The size of the cuts of meat we received varied greatly, could be more consistent.”

How did you find out about us?



Customers were able to select all that apply and it is clear, recommendations from family and friends (40%) is the primary way people learn about livestock producers, followed by livestock producers' websites (23%), and the Minnesota Grown online directory (11%). Many people also wrote in other options not on the picklist.

How did you find out about us? (1st timers)



First time customers also learned about their livestock producers via family and friends (43%), but also many of the "Other" ways as listed above (21%). Social media came in third (18%).

“Other” Ways People Found Out About Livestock Producers

Of these other ways customers found out about livestock producers, farmers markets came up very frequently. Customers also listed friend, “known”, and family – often further explaining their previously existing personal relationships. Other key referral resources were the Weston A. Price Foundation (WAPF), Eat Wild, and various county fairs.

How likely are you to recommend us to a friend or family member?

All things considered, customers are highly likely to recommend their livestock producers to a friend or family member (9.7 on a scale of 1 to 10). Livestock producers should consider their existing marketing mix, including working with existing customers and loyalty programs to help continue to spread the word.



Customer Quotes

“I have and do! Everyone has been very well pleased with their product. Over the past 7 years I have purchased from my farmer, I have engaged 30 other families. Everyone is excited to get product from our farmer.”

“I would definitely recommend your product with a caveat about the final price.”

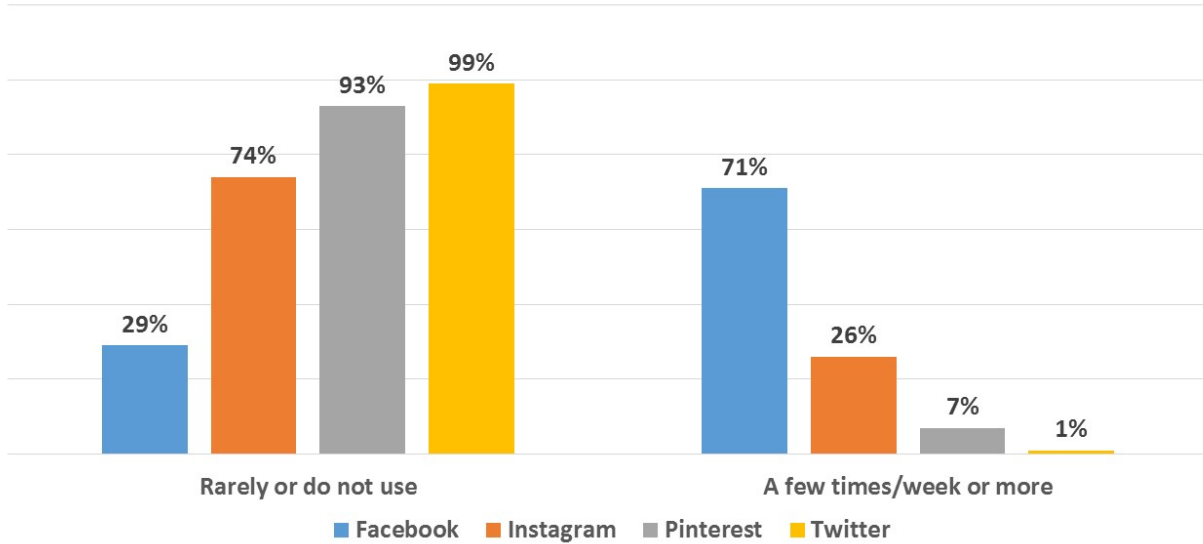
“Have told many people about your quality products and your great communication with customers.”

“I will recommend and have recommended your products. I've had people ask about grass-fed vs. grain fed and I literally bring them a pound of the ground beef to try. Everyone has been impressed with the difference in the way the beef looks, smells, cooks, and tastes. It is hard to explain the difference so I give them some to cook for themselves. Above the taste, it is really about the treatment of the animal, we cannot claim to be good people but allow the mistreatment of creatures.”

"Thank you for your commitment to producing the best quality and flavorful products. It is soul nourishing to enjoy and share your pigs!"

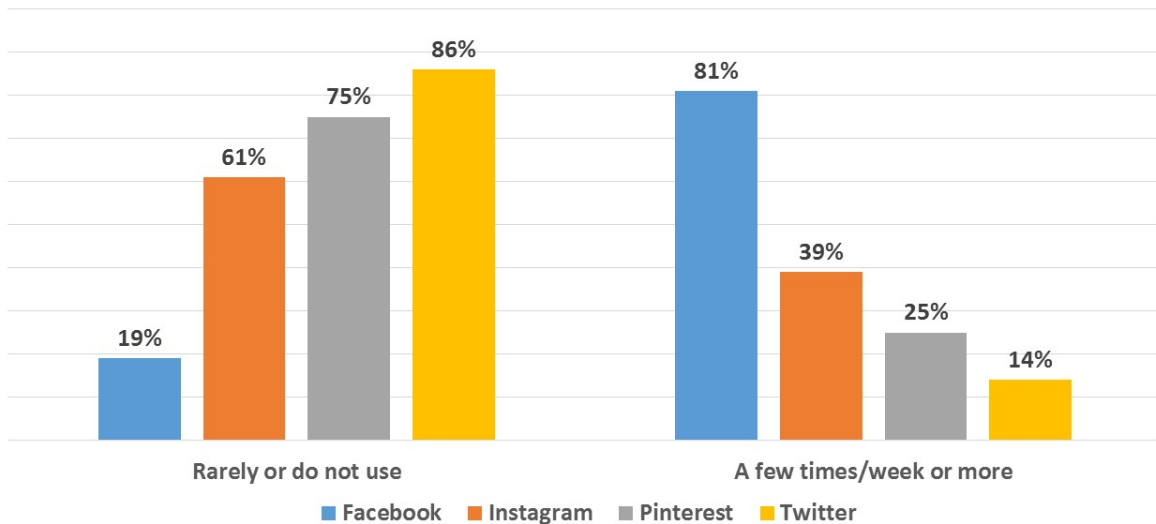
"We've convinced friends and neighbors already. Our neighbors are now splitting quarters with us and several friends have made purchases over the past few years."

How often do you use the following social media?



Comparable to our other customer research studies, the majority of people using social media regularly are using Facebook (71%) a few times per week or more.

How often do you use the following social media? (1st timers)



An even greater number of first time customers used Facebook regularly, 81% use it a few times per week or more.

First Time Surveying Livestock Customers

Since this is the first time we are doing a study of this nature with livestock producer customers, we asked a couple of broader questions to learn from the customers and help inform what we are able to offer livestock producers.

What else do customers want to know about the products, the farms, or farmers?

Most customers felt their needs were being met. Those who did answer care about their livestock producers personally, care about the animals and environment, and are curious about other product offerings, either as offered by the livestock producer or by their partnering with nearby farms and producers.

Customer Quotes

“What kind of super-powers do these farmers have to do such an amazing job?”

“I am worried about the impact of beef farming on our environment in general and may choose to stop purchasing for that reason. I'd like it if I knew my farmer was working hard to minimize the environmental impacts of the farming operation. That would be a major selling point with me.”

“I feel very confident in the flow of information currently happening via newsletter and personal chats, and I know I can always ask anything.”

“I really like the occasional updates I don't expect anything more than that but it would be cool to have a visitors day!”

“I have reviewed their website and it really helps to know how they treat their animals. Also they are very open to allowing people to come to their farm to see for themselves. I think that's very important to establishing trust they take care of their animals.”

“I feel like I know a lot about the farm, products and farmer. One thing I realize I know very little about are the different breeds and flavor profiles. A taste test would be fun!”

“I appreciate that you work with a local family owned processor, but I would love to be able to order some brats or other sausage or specialty items.”

“I believe you are pretty open about how you care for, what you feed and who you use for butchering, so keep that up. I like transparency/honesty.”

“Curious about my business' policies and political outlook. I am so very concerned about the environment, health, and treating each other fairly and with kindness.”

“Are you making a good living? Is this venture sustainable for your family?”

“You do a great job, we love your products and feel good about where they come from.”

“You're creating an excellent product, and you've answered any questions as I've raised them.”

What can we do to improve your buying experience?

Customers are relatively satisfied, however a few themes came to light in their comments. The biggest request is for more clear and concise communication, particularly about how buying livestock (whole, half animals) works and all costs involved. Several people expressed processor fees were either a surprise to them or too costly. Several also commented regarding pick-up locations and/or requesting delivery options, particularly in the Twin Cities. Finally, several people asked for improved meat processing based on unsatisfactory cuts, limited processing options, and poor wrapping materials.

Customer Quotes

"Be more clear about the final cost of the product. We were definitely surprised by what we paid."

"Be very good and clear about delivery locations. Be more user friendly in ordering and locations. For some reason the current format creates confusion. Perhaps put the specific location options for each week on every form, email and piece of information."

"Better communication between butcher, customer...Provide better idea of the amount of meat included. Butcher needs form with more options. The proportion of meat to fat was not financially acceptable."

"Better information on what will be available when. Currently we contact you when we are getting ready to purchase to see where you are in the cycle. It would be nice to receive quarterly updates stating what will be available when. If you know of farmers raising chicken, it would be great to know that as that is the only meat we buy at a store."

"I am very happy that you accept EBT at the Saint Paul Farmer's Market."

"Consider a metro area pick-up option - maybe only available on one or two dates."

"Delivery might help since a long drive from Twin Cities to processor."

"Find a good butcher and stay with them."

"Having drop sites around the metro would be really nice."

"I was surprised that the processing wasn't included. I don't recall that being communicated."

"I was willing to pick up from the processor but would be interested in home delivery in the future (for a fee)."

"I would love to get even more from you (like chicken, eggs, etc.), but know you don't do that. So, maybe just more heads up about availability."

"It is a little confusing to pay part of the money to the farmer and part to the butcher and from the beginning it's not fully clear how much it will all cost at the end. I'd rather know exactly how much I'm paying out of pocket per lb so I can compare to the coop."

"It would be nice to have 'processor guidance' for new buyers on your website. I've purchased enough to know what the processing options are, but it took a bit to learn."

“Just wish you were closer to the Twin Cities or that there was a delivery option.”

“Let me know more often when you have animals available so I can share the news with others who are interested.”

“My only gripe is about the way the ground beef is packaged. The plastic is so thin that there are almost always holes. Holes are a problem because as it's thawing it leaks. Also, if I try to thaw it quickly in warm water, the water leaches into the meat which then becomes waterlogged.”

“Some processers are better than others. When the cuts don't look like the cuts available in the store, it's hard to figure out what to do with them.”

“Sometimes cuts are made at odd angles, difficult to identify the cut, compared to a grocery store.”

“Sometimes the processing could be better. Steaks can be pretty rough cut, which can be disappointing.”

“The cuts of the roasts are often tough and difficult to determine how to cut properly. The Briskets have been trimmed and without fat as is wanted to cook/smoke.”

“The only thing we didn't like was the amount of blood packaged with the meat. When thawing the meat we have to be sure to rinse the meat completely clean of the blood or there is a bad taste once cooked. This is the processors issue and most likely is not fixable. Just something we've found to be true.”

Key Findings

- Supporting local farmers, product taste / flavor, how animals are raised / processed, quality of products, and personal relationship with the livestock producer were key reasons customers bought directly from livestock producers.
- On average, customers have been buying from their livestock producers for about 4 years.
- Over 50% of customers have previously bought from their livestock producers for 2 – 5 years.
- Although most of the products mentioned can be purchased at any grocery store, customers pointed out the importance of how the animals are raised / processed, buying local, taste / flavor, and quality as defining features of their direct purchase livestock products.
- Customer travel 31 miles on average to buy their livestock products and over a third drive 50 miles or more.
- Customers spent \$451.45 on average per purchase with first time livestock customers spending slightly more, \$498.55.
- Quality (8.9) and Variety (8.7) both scored highly on a scale of 1 to 10.
- Overall satisfied with their purchases, customers want smaller packaging options, and improved meat processing.
- Customers learned of their livestock producer primarily via recommendations from family and friends (40%), livestock producers' websites (23%), and the Minnesota Grown online directory (11%).

- Customers also learned of livestock producers through other ways: Farmers markets and, in many cases, existing relationships with the livestock producer (family, neighbors, etc.).
- Other ways and social media are two ways first time livestock customers most learned of their livestock producer.
- Livestock producers should consider their existing marketing programs, including working with existing customers on referral and loyalty programs to help continue to spread the word.
- Customers want more clear and concise communication, particularly about how buying livestock works and all costs involved.
- The desire for better pick-up locations and delivery options, particularly near/in the Twin Cities came up repeatedly.
- Meat processing was somewhat subpar for customers. Several mentioned unsatisfactory cuts, limited processing options, and poor wrapping materials.
- Facebook is used by 71% of all customers at least a few times per week, however that number jumps to 80% for first timers.
- Customers care about their livestock producers, care about the animals and environment, and are curious about other product offerings. They even suggested partnering with nearby farms and other producers.
- The vast majority of customers are highly likely to recommend their livestock producer to family and friends (9.7 out of 10).

What did livestock producers say about the survey process?

Feedback from the livestock producers about the process was generally positive and we learned from them as well. Thank you for your feedback!

The livestock producers appreciated the ease of participation in the research project. Based on their comments, Minnesota Grown will consider changing the timing if this research study is replicated in the future.

Livestock Producers' Quotes

Easy

"Everything came ready to go. All I needed to do was put up poster and hand out cards."

"You folks do an outstanding job!"

Different time of year

"I would like to see this done during the summer months as I'm sure there are several producers like us that do not have a customer email base. We have very little interaction with our clients during the winter months."

"Conduct survey during the summer when exposure to customers is much greater."

Data Collaboration and Sharing the Information

Participating livestock producers also received confidential, individual market reports including their summarized, anonymous data and customer comments.

The aggregate report is posted online and also announced in the Member Update newsletter.

Anonymized data sharing and collaboration with select partners is important to help increase statewide demand for local products.

We continue to listen to farmers, markets, producers, and business owners to increase the value of the results. [Contact us if you have any questions about this or other customer satisfaction research projects!](#)

