BRECKINRIDGE COUNTY UNITED

★ ★ ★ ECONOMIC DEVELOPMENT ★ ★ ★

Breck County Goes to the Grocery: How We Shop and Why It Matters

By Meredith Dubree

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Executive Summary

Breckinridge County United's purpose is to improve quality of life in the community through the attraction and retention of jobs, development of the workforce, and growth of the tax base. While economic development is frequently associated with industrial development, another strategy for cultivating new jobs is to analyze retail patterns to identify "leakages," or sectors where people are largely spending their money outside of the community.

Grocery shopping was thought to be a major source of retail leakage, so, in January 2021, Breck United conducted a survey to gather evidence around our community's shopping habits. The survey received 854 responses and was conducted primarily over Facebook. The survey had three primary goals:

1. identify where Breckinridge County residents are doing their grocery shopping;
2. identify what factors were most important to people when selecting a grocery store, and:
3. explore whether there is interest in additional local grocery options.

The results showed that while many Breckinridge Countians do shop at local stores such as IGA, Sav-A-Lot, and the Farmer's Market, their preferred stores are largely located outside of Breckinridge County. IGA (55.04%), Wal-Mart (49.18%), and Kroger (47.07%) were the most commonly utilized stores. When asked for the distance to their *preferred* store, 60% said it was more than a 30-minute drive. For 10.68%, their preferred store was over an hour away. Based on the responses gathered, we estimate that between 33 – 60% of residents preferred a store outside of the county.

Based on analysis of USDA spending data and our latest census results, we estimate that our county residents spend approximately $38 million each year on groceries. With our earlier estimate of 33-60% of shopping occurring in other counties, this represents an estimated loss to the county's economy of $12 – 22 million each year. Income data suggests that wealthier residents are more likely to shop out of the county. Therefore, even if this small percentage of the population is shopping out of the county, since it is the population with the most resources, this exodus could negatively impact our county's economy.

The data we collected to show what factors led people to shop at certain stores is not conclusive, as many people chose "most important" for every category or almost every category. However, 52.51% chose price as the most important quality, closely followed by produce (51.54%), variety (49.76%), and meat (46.22%). Fewer people selected location (13.62%), local products (13.01%), and prepared food (9.17%) as most important. Income levels had a strong impact on these rankings. For example, individuals with incomes below $30,000 were much more likely to say price and location were most important, where those with incomes above $100,000 stating that variety and produce were most important.

Over 96% of respondents said they would shop at a new, locally-owned grocery store, if one were to be founded. The factors that people said would be important to them in a hypothetical new store largely matched the factors that shaped their current shopping habits. However, 62.06% of respondents said “local” products were either most important or important in a potential locally owned store as compared to 48.2% for the stores at which they currently shop.

A majority (69.13%) of respondents said they would spend slightly more for locally-sourced products. 18.54% said they would not spend more at all, and those who would pay considerably more or always buy local made up the remaining 12.32%.

In short, the survey data revealed that many, if not a majority, of Breckinridge County residents shop for groceries out of the county and the motivating factors for that are price, produce, and variety. We estimate this represents a loss to the community of at least $12 million annually. Additionally, there appears to be an openness to a new, locally-owned store, though the motivating factors behind people’s shopping habits would largely remain the same. To understand the true economic impact and feasibility of a locally-owned grocery store, further research is needed.

Introduction

The modern supermarket is arguably the quintessential American institution. Within the walls of a grocery store, one can find examples of the seemingly endless opportunities and wealth generated by our nation. Items that were luxuries a few decades ago - and still are in parts of our world - can be affordably selected from the shelves. These stores represent our notion of the melting pot, including options for people of all cultural and socioeconomic backgrounds. They are convenient and cost effective. They have become enormous, frequently being not only sources of food, but of clothes and toys and toiletries and décor.

Yet, they also represent some of the worst aspects of our culture. While we pride ourselves on our excess, such excess often equals waste. As our country battles a growing war against obesity and poor health, it is tragic to know that with all of the knowledge and options available to us, the most commonly purchased goods in a grocery store are soft drinks and potato chips. And, like so much American industry, food retailers are becoming increasingly owned and controlled by fewer and fewer ultra-wealthy individuals/companies. For example, Wal-Mart alone controls over 25% of the grocery market.

For many Breckinridge County residents, the idea of introducing a new supermarket is a difficult subject. We have two IGAs, a Sav-A-Lot, and a Dollar General every few feet. We also have a successful farmer's market program and a popular salvage store. Despite these options, since 2018, a new grocery store has consistently been one of the most frequently requested projects for Breckinridge County United. Considering the economic and social importance of grocery shopping, these passionate feelings are understandable. The average American spends approximately 4.9% of their disposable income on groceries (compared to 4.6% on restaurants). Based on our most recent census data, that's approximately $1,800 each year for the average Breckinridge County resident.

Why Grocery Shopping is an Economic Development Issue

While buying food is obviously an essential part of the home budget, the stores we choose to patronize have an impact beyond each individual or household. In every community, just as in every household, there's a constant stream of money flowing in and out. For most people, the goal is to grow and control that stream - we want more money coming in and less flowing out. We cut costs, we clip coupons out of the paper, we even add another income stream, etc. In our communities, this is where economic development comes into the picture through the process of bringing new revenue into the community. Industrial development and recruitment is the focal point of most economic development strategies. We increase the flow of money into the community through the creation of well-paying jobs. However, controlling the money once it's in the community is much more difficult, but is an equally impactful issue.

Economists Bernie Ward and Julie Lewis compare the local economy to a leaking bucket. In their scenario, anytime money leaves the community, the bucket leaks. For example, if a person spends $10 on a shirt on Amazon, that money "leaks out of the bucket". However, if the person buys soap from a local producer, the money stays in the bucket. In today's economy, the issue is further complicated by outsourcing. For example, a person may buy a shirt from a local store but the local store's suppliers are in Atlanta and the shirts are made in Taiwan. A portion of the money spent at the local business remains in the bucket, but what the business pays to their suppliers represents another leak. The bucket will always leak. Our job is to find the holes that can be filled or partially filled and work to do so.

The USDA reports that the average American spends 9.5% of their disposable incomes on food, with 4.9% on groceries specifically. Based on that figure and Breckinridge County's estimated disposable income per capita, we estimate that our residents spend over $38 million each year on groceries. We decided to undertake this study to explore the current shopping habits of our residents so we can gauge the extent of retail leakage in the grocery industry, and determine whether there was interest in other local options which would slow that leak.

Methodology

In order to best evaluate the extent of leakage in the grocery sector and consider the best options for our community, it was essential for us to gather data and not simply anecdotal evidence. The purpose of this initial survey was to document the current grocery shopping habits of Breckinridge Countians, as well as to gauge factors that had the potential to alter those current behaviors. The survey was written with assistance from the Kentucky Center for Agriculture and Rural Development. While it prevented us from gaining a more detailed look at certain factors, we chose to limit this survey to ten questions.

Breckinridge County United administered this survey online via Facebook from January 7 through January 22, 2021. The survey received 854 responses. Assuming there weren't repeated households among respondents, this survey captured over 2,700 individuals. According to the 2019 census estimates, Breck County has 7,598 households and 20,176 residents. Therefore, this survey reached 11% of Breck County households and over 13% of the total population. 10% of the population is a standard sample size goal, so this level of response allows us to confidently state we are representing the general population. That being said, we acknowledge that this is not a random sample, as the participants were self-selected based on interest and exposure to the Breck County United Facebook.

The questions are divided into three broad categories: demographics, shopping habits and motivations, and feelings toward a new store. To collect demographic information, we focused questions on age, household size, and income. These questions were essential in ensuring we captured an accurate view of the county as a whole. The second set of questions focused on how Breckinridge County residents currently shop and what motivates those decisions. Finally, we posed three questions to gauge support for a hypothetical locally-owned and locally-sourced grocery option.

We want to acknowledge that our choice to publish the survey on Facebook led to individuals over 65 being under-represented and individuals aged 35-44 being significantly over-represented. We believe that this also led to a lack of engagement from people who have lower incomes. For example, 15.67% of survey respondents make less than $30,000 per year, as compared to 33.45% of the actual population. Taking these concerns into account, our data still provides us with answers from a sizable portion of the population and is still representative enough that we can use it to generate informed conclusions. However, care has been taken to look at each question with specific attention to age and income.

Findings

Part I: Current Shopping Habits

Our primary motivation for this survey was to explore the current grocery shopping habits of Breckinridge County residents. Anecdotal evidence was plentiful – people shopping outside of the county is a frequently discussed event. However, we needed numbers and actionable data. The following four questions focus on how often people go grocery shopping, where they choose to grocery shop, and what factors motivate them to shop at certain places.

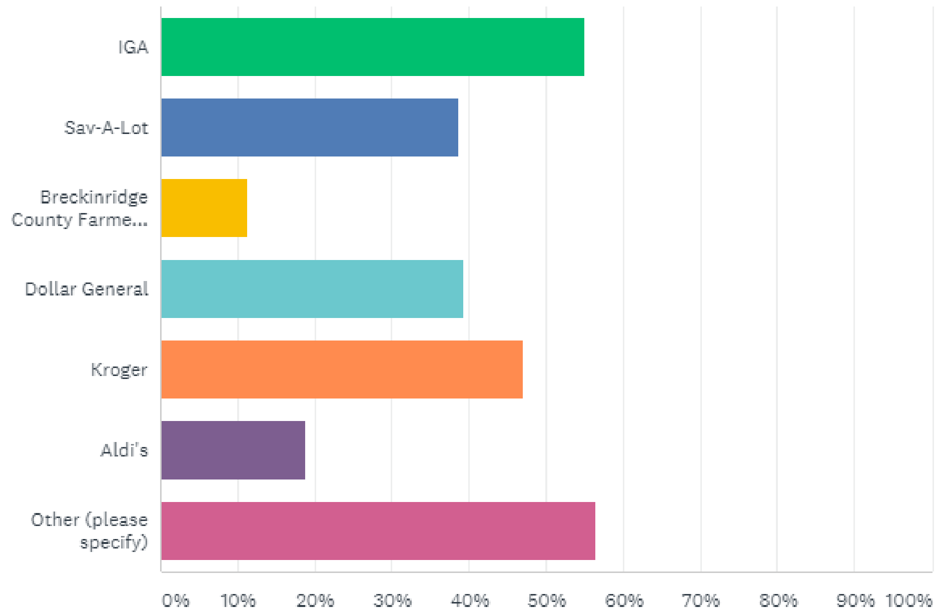
How often do you go grocery shopping?

Almost half of respondents (43.36%) said they go shopping once a week. 27.14% go shopping a few times a month. Following closely are those who go shopping a few times a week (25.85%). Only 3.64% said they went grocery shopping almost daily. Overall, these responses remained relatively consistent across demographic categories, though for individuals with an income under $15,000, the number of almost daily shoppers jumped to 19.35%.

Please select the stores at which you frequently purchase groceries. Select all that apply.

We chose to ask two questions regarding where people shop. First, we asked respondents to select all of the stores they frequently use. In the process of building the survey online, a mistake was made on this question and Wal-Mart was left off as a choice, leading to 483 “other” responses, 420 of which were Wal-Mart. We went back and reconstructed the data with Wal-Mart properly included and both sets are available in the appendix.

IGA was the most common response, with 55.04% saying they used it frequently. Following closely were Wal-Mart (49.18%) and Kroger (47.07%). The Breckinridge County Farmer’s Market was the least used of the primary options (11.36%).



The responses to this question varied widely based on age and income. For example, people over age 65 are much more likely to use IGA (67.59%) and Sav-A-Lot (50%). They are also by far the largest users of the Farmer's Market (24.07%).

Individuals with household incomes over $100,000 were more likely to use Kroger (52.66%) or "Other" (60.36%). Conversely, individuals with incomes below $30,000 are more likely to use Sav-A-Lot (58.78%) and the Dollar Store (54.96%).

The data also showed significant overlaps between IGA, Sav-A-Lot, and Dollar General shoppers. There was less overlap between Kroger or 'other" stores and the local options.

We want to draw special attention to the Farmers' Market. The Farmers' Market is not a store where shoppers can get all the goods they need, so those who use the Farmer's Market are also more likely to use multiple other groceries. However, it is clear from our data that Farmer's Market usage is highly associated with age as only 2.7% of respondents ages 25-34 reported using the Farmer's Market. This age category was most likely to report shopping at "other" (71.62%). Additionally, while 28.95% of respondents were 55 or older, 50.53% of Farmer's Market users were over 55.

Two items that we were intrigued by in the non-Walmart "other" responses were the fact that only five people listed Ridgeview Salvage and only one person noted that they shopped for groceries online. We were expecting both of those responses to be higher, especially online shopping considering we released the survey in the midst of the pandemic. If we do additional surveys in the future, online shopping is something we are interested in exploring further.

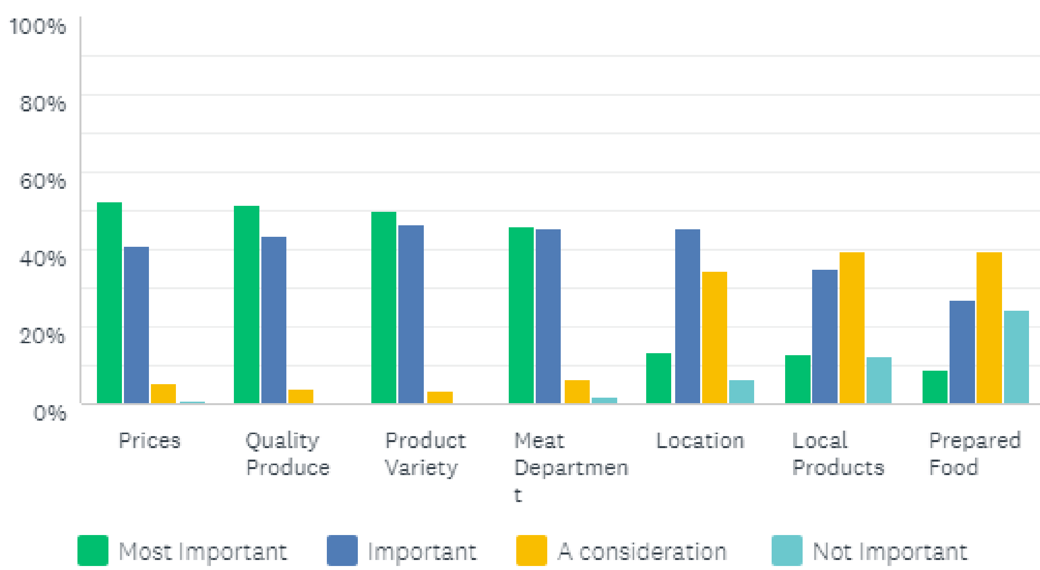
What is the average drive time to your preferred grocery?

To contrast with the previous question, which asked people to select multiple locations, we wanted to focus separately on the distance to a person's single *preferred* grocery. The results were stunning, if unsurprising. While 22.54% said their preferred grocery was within 15 minutes, 60% said it was more than a 30-minute drive and 10.68% said their preferred store was over an hour away. Since we didn't ask where in the county people lived, we can't use this to determine exactly whether people are shopping in the county or not. However, we are assuming that everyone driving 40 minutes or greater (32.27%) has a preferred store outside of the county. That number could be closer to 60% depending on how many people in the 30–35-minute category are also leaving the county.

Income levels do appear to be a factor in those who drive the farthest. 24% of those driving an hour or more have an income above $100,000, compared to 15.19% of total respondents. Of people whose income is less than $30,000, 26.6% drive less than 10 minutes and over 53% drive less than 25 minutes (compared to 39.27% of total).

What products/characteristics are most important in your decision where to purchase groceries?

Finally, we wanted to explore why people shop at the stores they do. We focused on price, quality produce, variety, meat departments, location, local products, and prepared food. Respondents were asked to rank them as most important, important, a consideration, or not important. Many people chose most important for multiple categories (if not all categories). Price was the most important quality for 52.51% of respondents, closely followed by produce (51.54%), variety (49.76%), and meat (46.22%). There was a significant drop off between those categories and location (13.62%), local products (13.01%), and prepared food (9.17%). Only three people (.35%) said variety wasn't important. 12.29% said local products weren't important and 24.29% said prepared food wasn't important.



Income had a strong impact on the factors people selected as most important. For those who stated their income was under $30,000, price definitely becomes the most important factor (72.66%). However, they are also more likely to say that location (23.26%), local products (17.97%), and prepared food (11.11%) are most important. For those with incomes above $100,000, produce (59.52%) and variety (58.58%) were the most important, while fewer said that location and local products were most important.

After taking a closer look at those who selected local as most important, we found a higher percentage of lower income individuals prioritized local products. As incomes grew, the percentage shrunk. Those who find local products important or most important are more likely to also say location is important or most important.

Part II: Local Grocery Interest

After establishing the ways in which people currently shop, we will now explore the amount of interest in a locally-owned grocery in Breckinridge County.

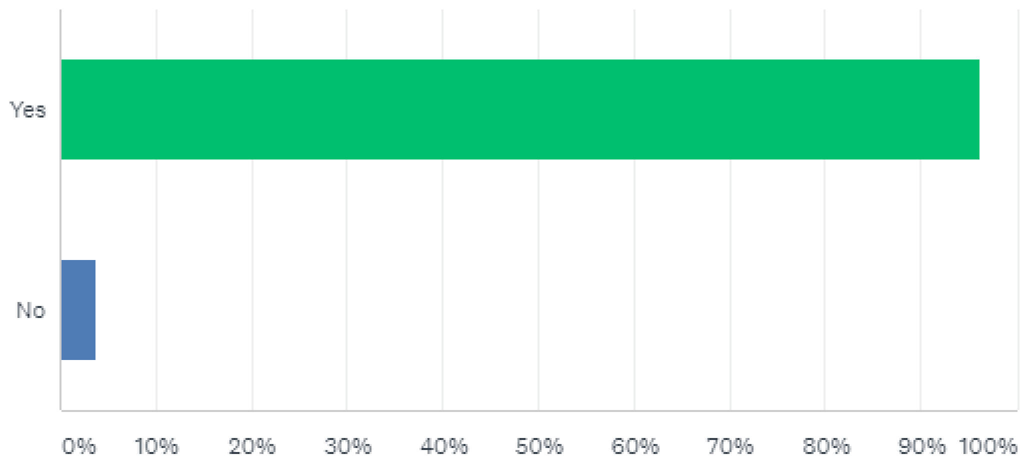
One may ask, "Why a local grocery and not a larger chain?" For two reasons: one reality based and one aspirational. In 2018 and 2019, Breckinridge County United contacted the development branches of all the chain grocery stores that operate in our region. None of them expressed any path forward for us to successfully recruit one of their stores. This is primarily due to the fact that these stores base their development decisions on population size and high-traffic areas. For example, the representative from Kroger told us that they are looking to locate in areas that have 200,000 people in a 40-mile radius and Breckinridge County only has a population of 20,000. Aldi's, to compare, has a much smaller target population, but wants a site with 20,000 traffic hits per day. The highest traffic point in Breckinridge County is Highway 60 in front of Breckinridge County High School, and the daily numbers at the time did not pass 10,000. While there are many benefits to rural living, we have to accept that our smaller population means that the business model for these grocery stores is not sustainable in our environment.

On the aspirational side, we return to the idea of the "leaking bucket". If an Aldi's were to locate in Breckinridge County, the money spent there would remain in the community longer in the form of wages for local employees and local property taxes. That would certainly slow the grocery spending leak. However, since the groceries are not locally-sourced and a large portion of the revenue is returned to the corporate level, that money does leave the community. If we were able to have a locally-owned and more locally-sourced grocery option, that would further slow these leaks, as the money would not just go to employees, but to suppliers and ownership as well. An independent local store would turn money over in the community, time and time again.

Would you shop at a locally owned store in Breckinridge County?

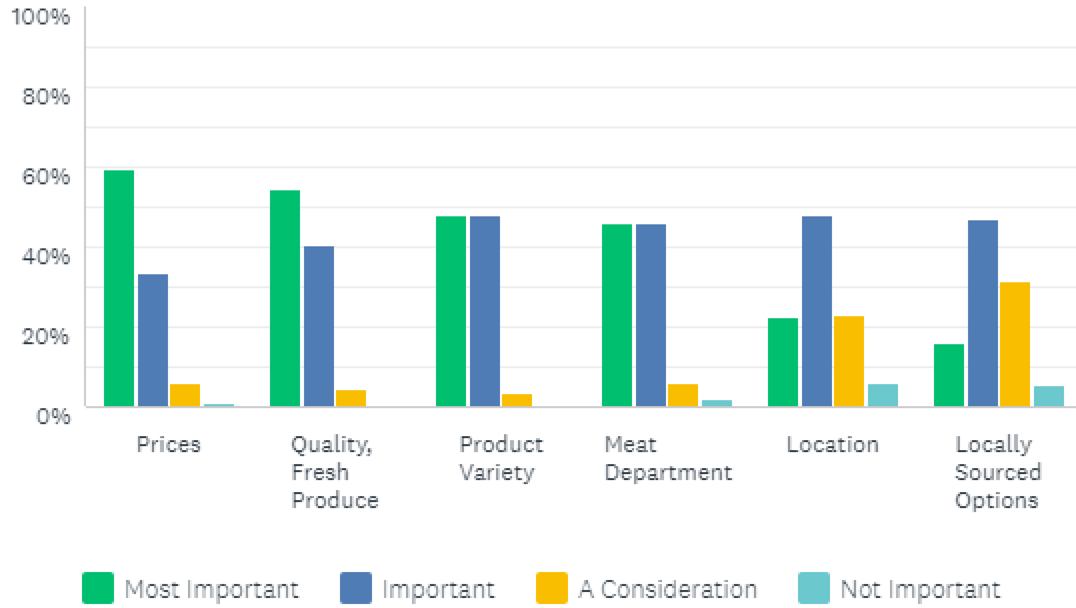
This straightforward question is one we felt the need to ask, in order to determine if people had loyalty to specific chains or routines that no local option could overcome. There were 31 people (3.67%) who said they would not shop at a locally-owned store. There were also 9 people who skipped this question, making it one of the more commonly skipped questions. Despite being a small percent of respondents, we still focused on these 31 people to see if any patterns emerged in why, they would not shop at a locally-owned store.

While these 31 people were fairly well spread across age and income groups, there was a slightly larger concentration of 25–34-year-olds and those with incomes $75,000 - $99,999. These shoppers largely use Wal-Mart and Kroger. One person helpfully stated simply that they do not shop in Breckinridge County. Otherwise, reading through the 31 individual responses did not reveal many similarities between these people and their motivations. Again, however, 814 people (96.33%) said they would shop at a locally-owned grocery store. While that interest is certainly dependent on other factors, this suggests that the community is open to a different local option.



What factors are most important in your decision of whether you would shop at a new local grocery?

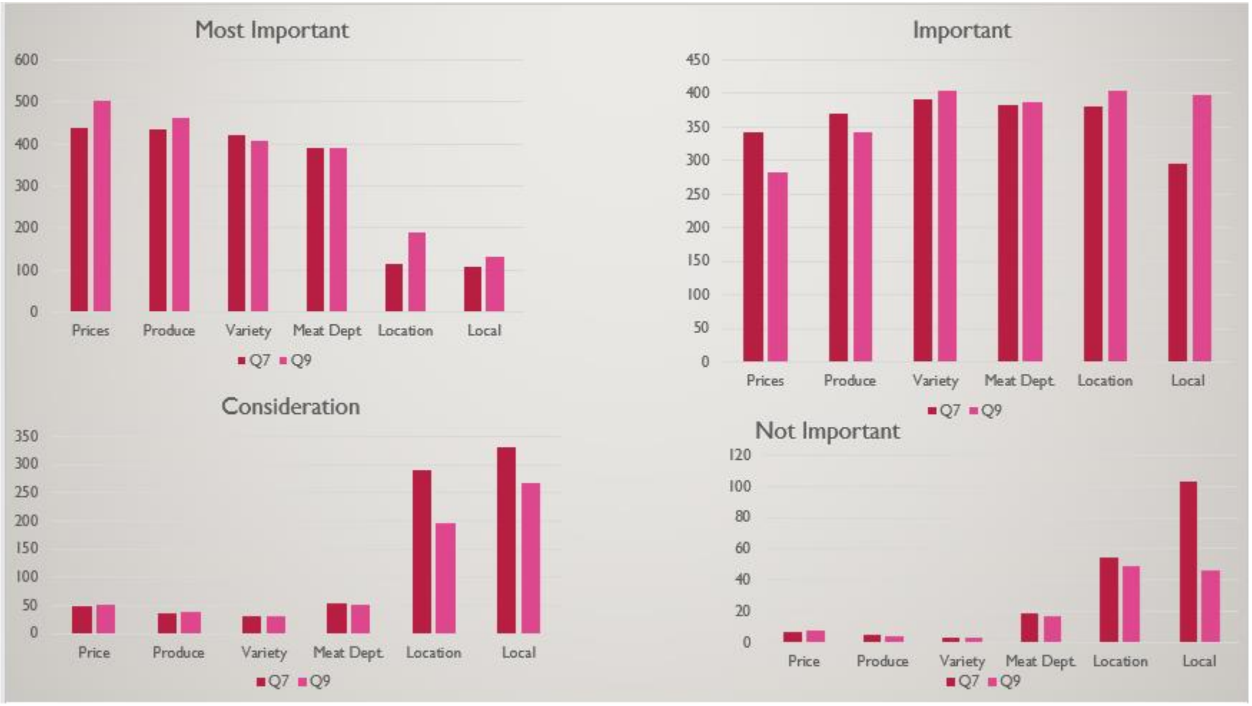
This question's purpose is to allow us to compare how people feel about the store they currently use with their hopes and expectations for a local store. Unsurprisingly, price was still the most important factor for a majority of people. In fact, the percentage who chose price as most important grew from 52.51% to 59.62% when considering the hypothetical local grocery. However, both location and locally-sourced options both showed significant growth in importance to respondents.



62.06% of respondents said local was either most important or important when considering a new local store, compared to 48.2% for where they currently shop. Perhaps more importantly, only 5.46% said that local was not important to them in a new store compared to 24.29% currently. This suggests that many people are interested in buying locally-sourced goods, but do not feel that option is currently available to them. On the other hand, people's statements in this question are all hypothetical. Their idea of what they would prioritize in a local store may be very different than what they would actually do if one were to open.

For those with incomes $100,000 and higher, there is a clear variation in responses from the lower income designations. Variety and produce are consistently their priority across the two questions. This group is least likely to say locally-sourced options are important. Age also appears to be a factor in local product interest. While the likeliest group to say that locally-sourced options are "most important" were those 18-24 (17.19%), more than 70% of individuals aged 55 and up said that locally-sourced options were most important or important. Additionally, 18–24-year-olds and those with incomes below $15,000 were by far the most likely to state that location was most important in a new local store.

Below, we graphed the results from these questions comparing people's priorities in their current shopping habits versus their stated priorities for a new local option. This allows us to more clearly view where these stated priorities differ. Again, the responses were largely consistent between the two questions, with variation primarily found in where people place "location" and "locally-sourced options."

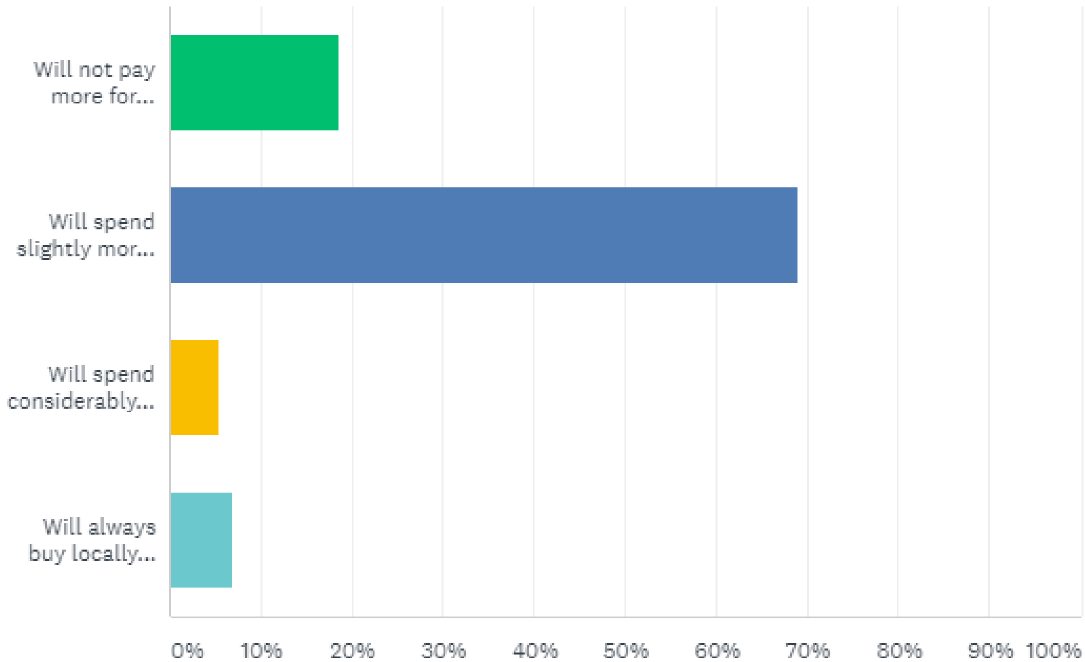


Q7 = ***What products/characteristics are most important in your decision where to purchase groceries?***

Q9 = ***What factors are most important in your decision of whether you would shop at a new local grocery?***

Are you willing to pay more for locally sourced food products?

Finally, we focused on people's willingness to pay more for certain features, specifically locally-sourced products. A majority (69.13%) said they would spend slightly more for locally-sourced products. 18.54% said they would not spend more at all, and those who would pay considerably more or always buy local made up the remaining 12.32%



Those over age 65 are most likely to say that they will always buy local when available. Those aged 25-24 are by far the least likely to say they would always buy local. The 55–64-year-olds are most likely to not pay any more for locally-sourced options. Income is interesting in this category. Those whose income is less than $15,000 annually are most likely to both say they would not spend more for local products and that they would always buy local when available. In general, however, as income increases, it is less likely for respondents to say they won't spend more for local products. Also, those who will always buy local are more frequent shoppers. Nearly 80% shop once a week or more, up from 72% of total respondents.

Analysis

As previously stated, this survey had two primary purposes – to generate data to support our assumptions on the extent of retail leakage in grocery spending among Breck County residents and to gauge the level of interest in a local option that would combat that leakage. To begin, let's consider the extent of grocery spending that occurs outside of our community.

It's Less a Leak, and More a Hemorrhage

Based on USDA spending data, we have estimated that Breck County residents spend at minimum $38 million each year on groceries. Further and more detailed financial analysis would be needed to verify that estimate. However, regardless of the exact figure, this survey has sufficiently demonstrated that a significant amount of Breckinridge County's grocery dollars are being spent elsewhere.

Let's address which stores people commonly use. While 55% said they did purchase groceries at IGA, the largest number of people actually chose "other" (largely Wal-Mart). We have two IGAs in Breckinridge County and it is our largest local store. Since only 55% of residents use it, especially considering how infrequently some use it, this indicates some level of dissatisfaction or lack of connection between this store and the community. Many people who chose IGA also indicated they used Sav-A-Lot, the Dollar Store, and other options, whereas many who chose Wal-Mart or Kroger did not list as many other options. Additionally, taking the distance data from question 6 into account, we are estimating that between 32 – 60% of residents *prefer* stores located outside of Breckinridge County. This would suggest that local stores are useful for quickly grabbing essentials, but are not a primary shopping destination. The data clearly show that price and variety far outweigh the convenience of a close location for most shoppers.

Basing our analysis purely on the distance to preferred store data, we are potentially experiencing a loss between $12,160,000 and $22,800,000 to the Breckinridge County economy due to retail leakage in the grocery sector. Taking the smaller estimate, this equates to $600 leaving our local economy for every one person in the county.

The number of times that people shop per week adds an additional wrinkle, as over 70% of respondents only shop once per week or less. Combined with the distance to a person's preferred store, this data suggests many individuals take fewer trips out of town to do their shopping.

Additionally, households with incomes between $50,000 and $150,000 are less likely to shop as often, while those with incomes above $150,000 do not adhere to this trend. This suggests that households with higher levels of disposable income are more likely to spend outside of the county than those lower-income households. Despite the wealthier group of families only making up a small portion of the population, they hold a considerable portion of money in our county. Therefore, this heavily impacts the amount of money lost to retail leakage, as the families with the most resources are the ones whose money is leaving the community.

We did not include questions about the actual grocery budgets of the respondents, so our data cannot conclusively state how much money Breckinridge Countians are spending on groceries outside of the county. However, we feel this survey has provided us with enough evidence to assume that a massive amount of money is exiting the local economy due to out-of-county grocery shopping, which we would cautiously estimate is at least $12 million annually.

The Trouble with Local

As stated above, a chain grocery store is unlikely to come to Breckinridge County and wouldn't provide the same overall economic benefit as an independent, locally-owned and sourced option. However, an independent store of any kind would have higher prices than a chain, and wouldn't have as wide a variety of products. Therefore, while 96% of respondents said they would shop at a locally-owned store, this data doesn't tell us much about the feasibility of such a store. Their priorities when shopping and willingness to pay more for local goods are better indicators for us to determine if there is sufficient interest to move forward with this project. Of course, price is a critical factor when deciding where to shop and our data shows it to be one of the factors driving people to shop out of the county at the moment. We believe this will be a serious challenge for an independent local store. However, there was significant growth in the number of people who stated that local products and location were important to them when considering the possibility of an alternative grocery option. Looking at the data showing fewer than 20% of respondents said they absolutely would not spend more for local products, this suggests that there are people in our community who would shop at a locally-owned store, even with slightly higher prices.

From this data, we found investment in a local store or local products appears to be a generational trait, rather than a decision based on access or income. The greatest interest in local products and greatest willingness to spend more on them came from the extreme ends of the age spectrum – people under 25 and those over 55. This correlates with the data gathered on those who utilize the Farmer's Market. This is a significant challenge because there are an ever-dwindling number of Breckinridge Countians in those age brackets. Furthermore, while we have a large population of older folks, they are more likely to be in the lower income brackets. The clientele who may most desire to see a local option may not have the resources to sustain it.

Additionally, the desire for a large variety of goods may prove to be a more consequential issue than price. The hypothetical local store would be smaller and more seasonal than a supermarket. If respondents are looking for a "one stop shop," it will not be the proposed independent option. However, this is not a problem specific to grocery shopping – it is one of the fundamental difficulties with the "shop local" movement. We can go online to Amazon or Walmart, etc., and quickly access almost any product we could possibly want for prices lower than we can ever find at a small business. This acts as an incentive for the individual to spend their money with these larger corporations and non-local businesses, but it may reduce local support for an independent grocery.

Conclusion

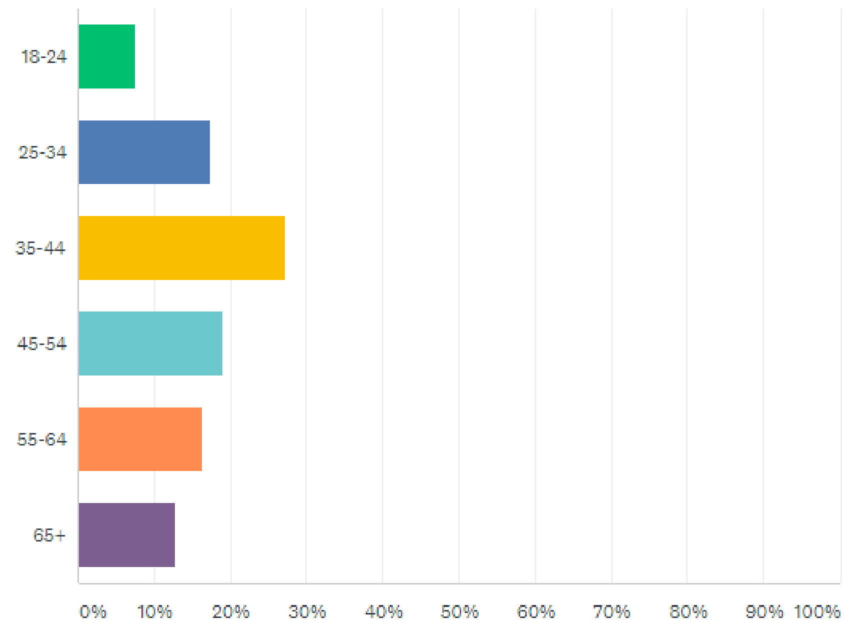
We embarked on this project to better understand one portion of our local economy. In that regard, we feel it is a success. This survey was designed to be short and easy to answer, which allowed us to connect with an incredible number of people. This approach also left us with as many new questions as we have answers. We feel we can definitively say there is an unmet demand when it comes to the grocery stores in our county, which is driving large numbers of citizens to shop elsewhere. For some, the prices may be too high, and for others, the variety too low, but this out-of-county shopping represents a loss of at least $12 million to the Breckinridge County economy, in addition to added expenses in terms of gas, wear on vehicles, and the loss of people's time. We propose further research on the feasibility of a locally-owned and sourced grocery store. While it would not match the lower prices of a supermarket, an independent local store would recirculate the greatest amount of money in the community and would provide shoppers with more control and a better understanding of where their food is sourced.

We also hope that our community will read this data and consider the impact of their shopping choices on the health of our economy. What is good for us as individuals in the immediate term is extraordinarily damaging for us all in the long run. The daily shopping decisions that each and every one of us make are directly responsible for the slow collapse of rural communities and increasing the wealth inequality in the United States. How we respond to this particular drain of resources from our community will serve as a bellwether for either our commitment to revitalizing our local economy or our apathy toward its continual decline.

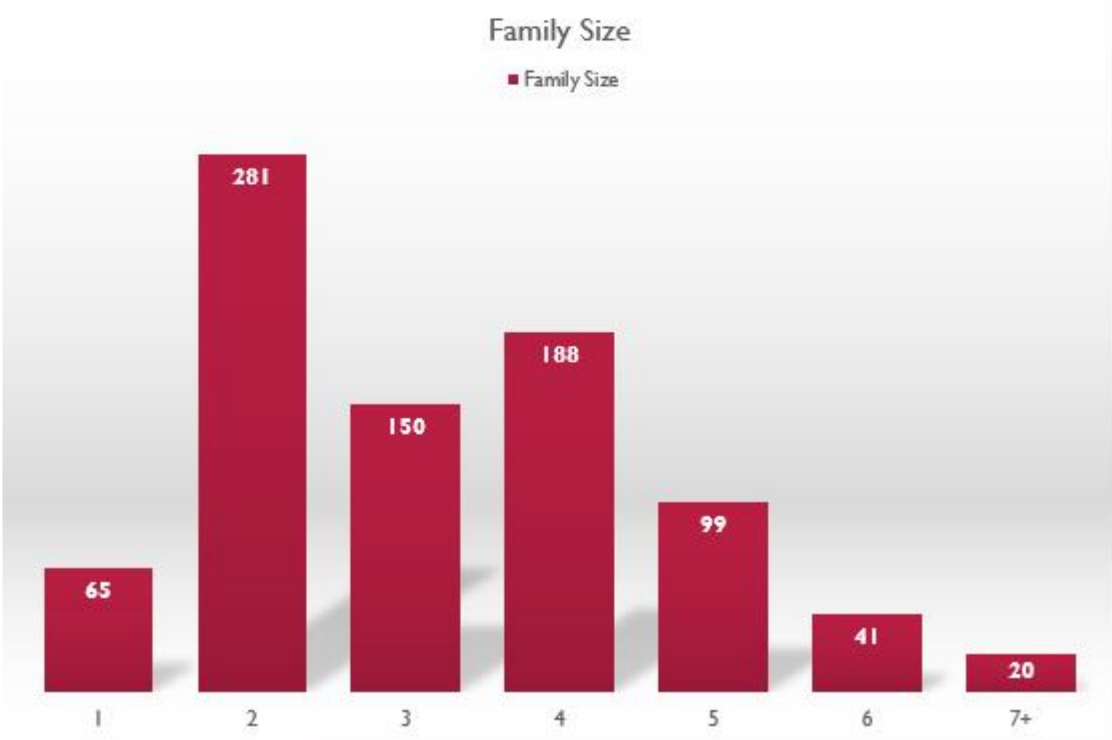
Appendix – Complete Response Totals

Please select your age group.

Answered: 850   Skipped: 4



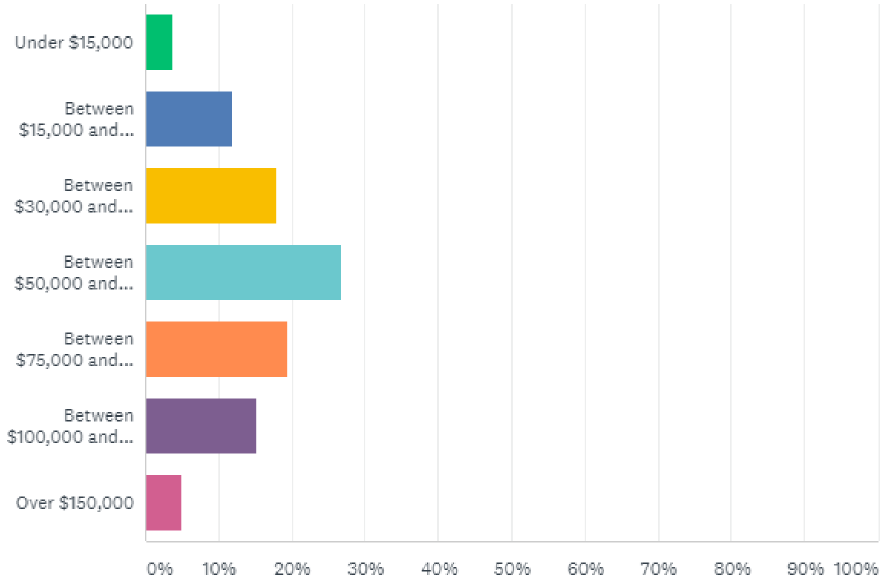
ANSWER CHOICES	RESPONSES	
18-24	7.53%	64
25-34	17.41%	148
35-44	27.18%	231
45-54	18.94%	161
55-64	16.24%	138
65+	12.71%	108
TOTAL		850



Household Size	#	%
1	65	7.7%
2	281	33.29%
3	150	17.77%
4	188	22.27%
5	99	11.73%
6	41	4.86%
7+	20	2.37%

Please select your household income range.

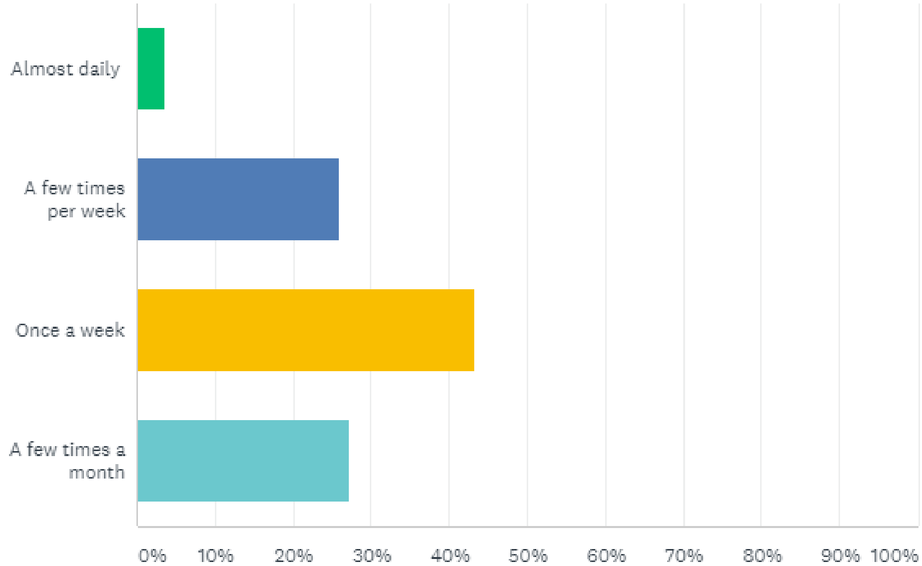
Answered: 836 Skipped: 18



ANSWER CHOICES	RESPONSES	
Under $15,000	3.71%	31
Between $15,000 and $29,999	11.96%	100
Between $30,000 and $49,999	17.94%	150
Between $50,000 and $74,999	26.79%	224
Between $75,000 and $99,999	19.38%	162
Between $100,000 and $150,000	15.19%	127
Over $150,000	5.02%	42
TOTAL		836

How often do you go grocery shopping?

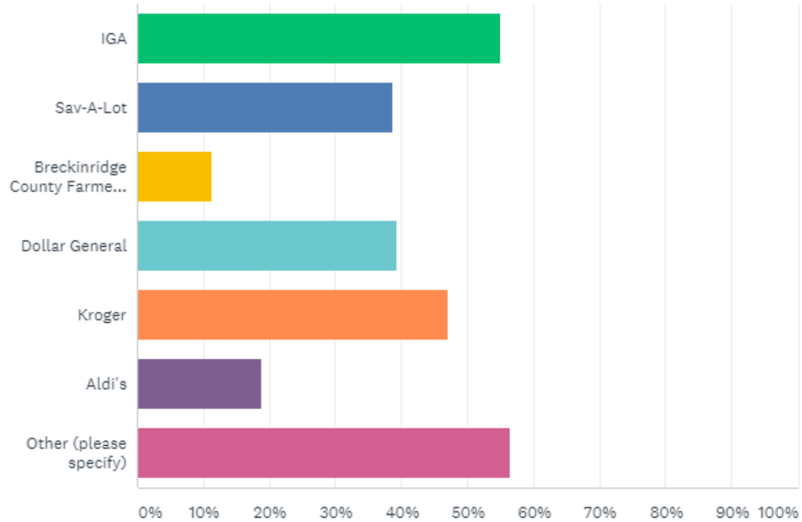
Answered: 851   Skipped: 3



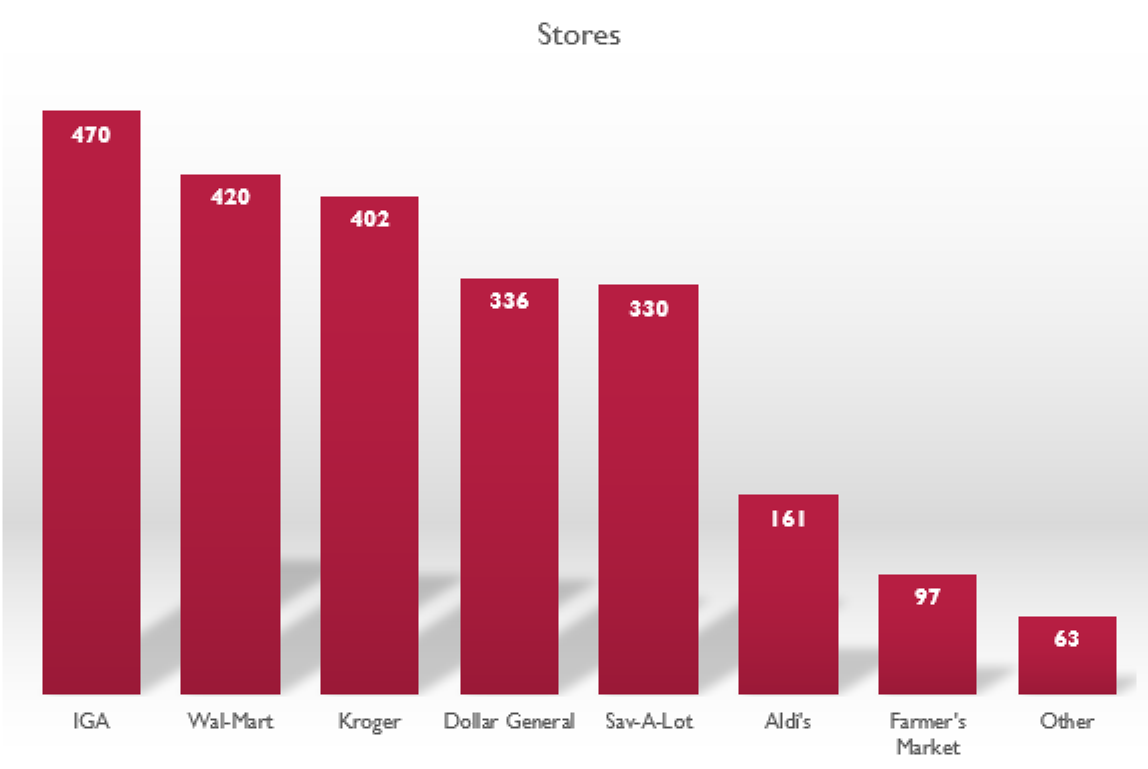
ANSWER CHOICES	RESPONSES	
Almost daily	3.64%	31
A few times per week	25.85%	220
Once a week	43.36%	369
A few times a month	27.14%	231
TOTAL		851

Please select the stores at which you frequently purchase groceries. Select all that apply.

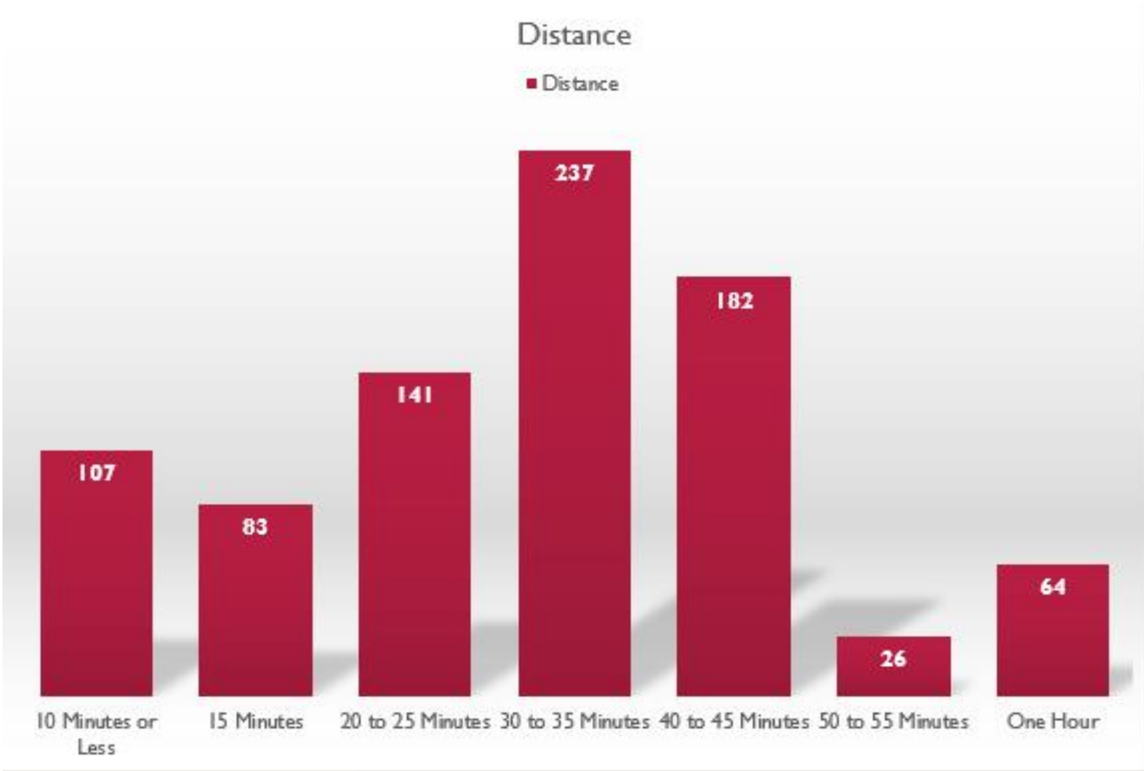
Answered: 854   Skipped: 0



ANSWER CHOICES		RESPONSES	
IGA		55.04%	470
Sav-A-Lot		38.64%	330
Breckinridge County Farmer's Market		11.36%	97
Dollar General		39.34%	336
Kroger		47.07%	402
Aldi's		18.85%	161
Other (please specify)	Responses	56.56%	483
Total Respondents: 854			



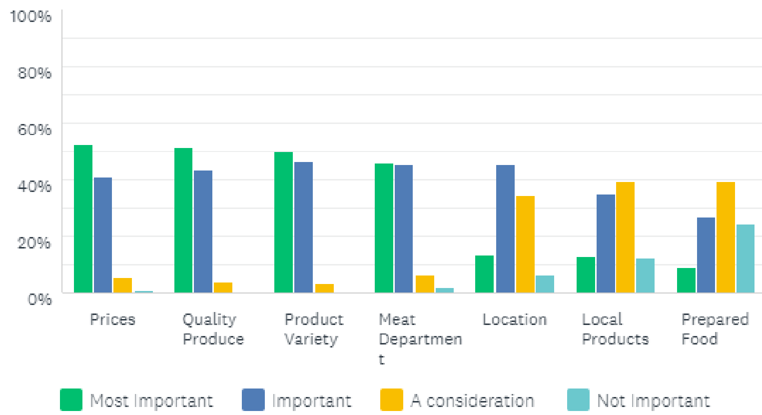
Store	# of People	% of People
IGA	470	55.04%
Wal-Mart	420	49.18%
Kroger	402	47.07%
Dollar General	336	39.34%
Sav-A-Lot	330	38.64%
Aldi's	161	18.85%
Farmer's Market	97	11.85%
Other	63	7.38%



Distance	#	%
10 Min or Less	107	12.69%
15 Min	83	9.85%
20-25	141	16.73%
30-35	237	28.11%
40-45	182	21.59%
50-55	26	3.08%
One Hour or More	64	7.6%

We want to know what products/characteristics are most important in your decision where to purchase groceries.

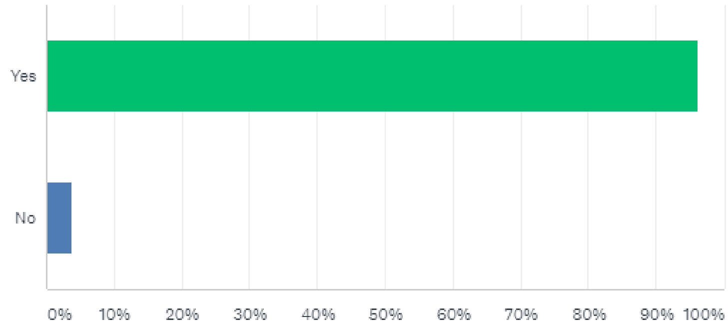
Answered: 852 Skipped: 2



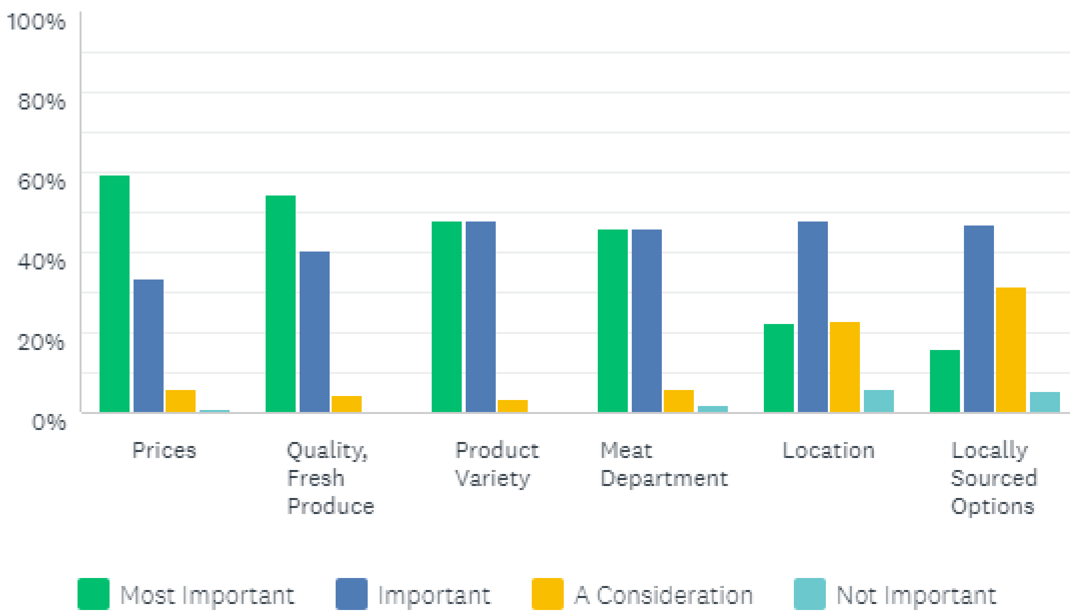
	MOST IMPORTANT	IMPORTANT	A CONSIDERATION	NOT IMPORTANT	TOTAL	WEIGHTED AVERAGE
Prices	52.51% 440	40.93% 343	5.73% 48	0.84% 7	838	1.55
Quality Produce	51.54% 436	43.74% 370	4.14% 35	0.59% 5	846	1.54
Product Variety	49.76% 421	46.34% 392	3.55% 30	0.35% 3	846	1.54
Meat Department	46.22% 391	45.27% 383	6.26% 53	2.25% 19	846	1.65
Location	13.62% 114	45.40% 380	34.53% 289	6.45% 54	837	2.34
Local Products	13.01% 109	35.20% 295	39.50% 331	12.29% 103	838	2.51
Prepared Food	9.17% 77	27.14% 228	39.40% 331	24.29% 204	840	2.79

Would you shop at a locally owned grocery in Breckinridge County?

Answered: 845 Skipped: 9



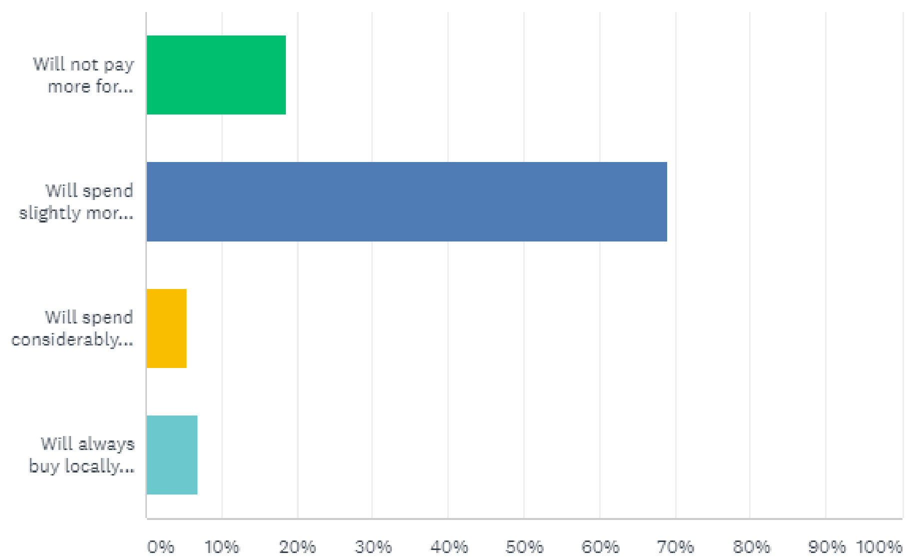
ANSWER CHOICES	RESPONSES	
Yes	96.33%	814
No	3.67%	31
TOTAL		845



	MOST IMPORTANT	IMPORTANT	A CONSIDERATION	NOT IMPORTANT	TOTAL	WEIGHTED AVERAGE
Prices	59.62% 502	33.49% 282	5.94% 50	0.95% 8	842	1.48
Quality, Fresh Produce	54.49% 461	40.43% 342	4.61% 39	0.47% 4	846	1.51
Product Variety	48.05% 406	47.93% 405	3.67% 31	0.36% 3	845	1.56
Meat Department	46.14% 389	45.79% 386	6.05% 51	2.02% 17	843	1.64
Location	22.74% 191	48.21% 405	23.21% 195	5.83% 49	840	2.12
Locally Sourced Options	15.80% 133	47.15% 397	31.59% 266	5.46% 46	842	2.27

Are you willing to pay more for locally sourced food products?

Answered: 852 Skipped: 2



ANSWER CHOICES	RESPONSES	
Will not pay more for locally sourced products	18.54%	158
Will spend slightly more for locally sourced products	69.13%	589
Will spend considerably more for locally sourced products	5.40%	46
Will always buy locally sourced products when available	6.92%	59
TOTAL		852