A Decade of Direct-Farm Marketing Data: The OFFMA Members Survey

Suzanne Ainley, PhD

The Ainley Group

www.ainleygroup.com

Get Fresh. Visit a Farm. www.ontariofarmfresh.com

Ainley Group
CONSULTING ENGINEERS & PLANNERS

Canadian Rural Revitalization Foundation
Agricultural & Rural Sustainability Concurrent Session
Guelph, ON
October 13, 2016

OFFMA Studies

Since 2005, OFFMA has carried out three different studies to benchmark economic impacts and learn about opportunities and challenges faced by direct-farm marketers (DFM) in Ontario.

Highlight key findings from the 2016 study then provide comparisons back to the previous studies released in 2009 and 2005.

CONSULTING ENGINEERS & PLANNERS

How Study(s) Conducted

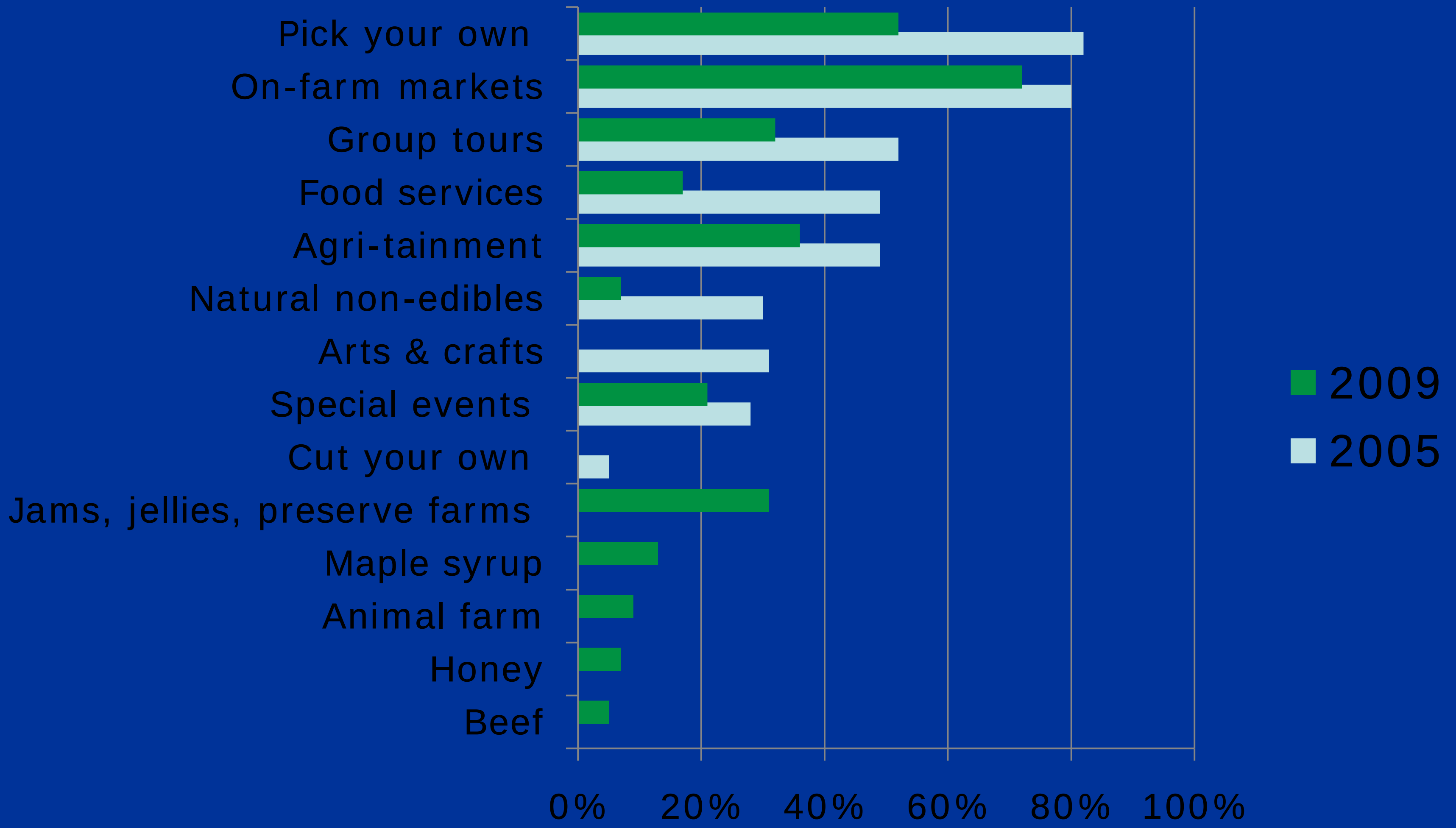
Survey questionnaire: cross-sectional design

2005 Phone interviews, Winter 2005
(99 completed; RR=25%)

2009 Interviews, Fall 2008; followed up by email or fax
(79 completed; RR=25%)

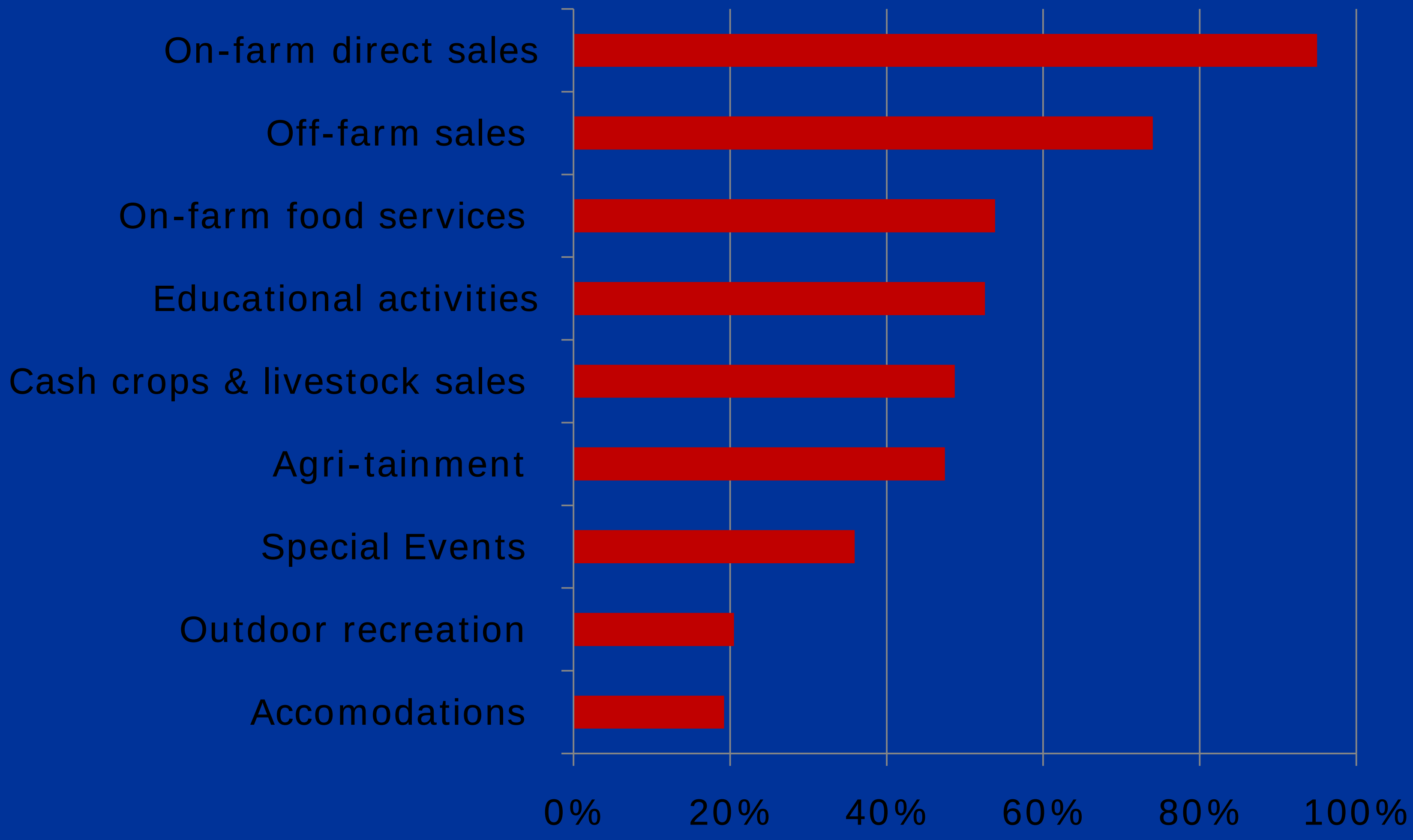
2016 Online (Fluidsurveys), Winter 2016
(112 completed; RR=40%)

2005 & 2009 Farm Activities



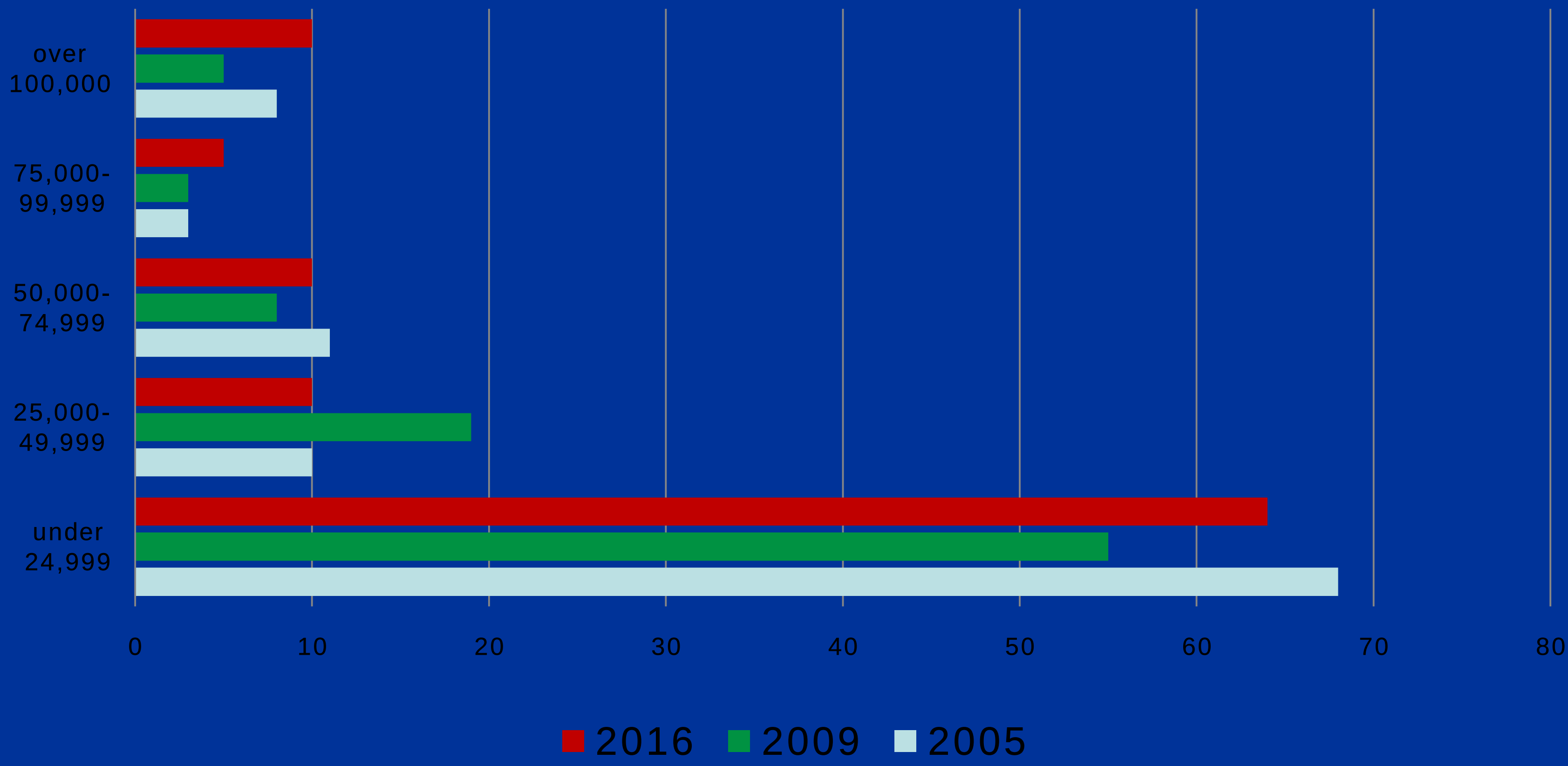
2016 Activities on Farms

Based on NAPA standardized list (n=78)



Estimated Visitors

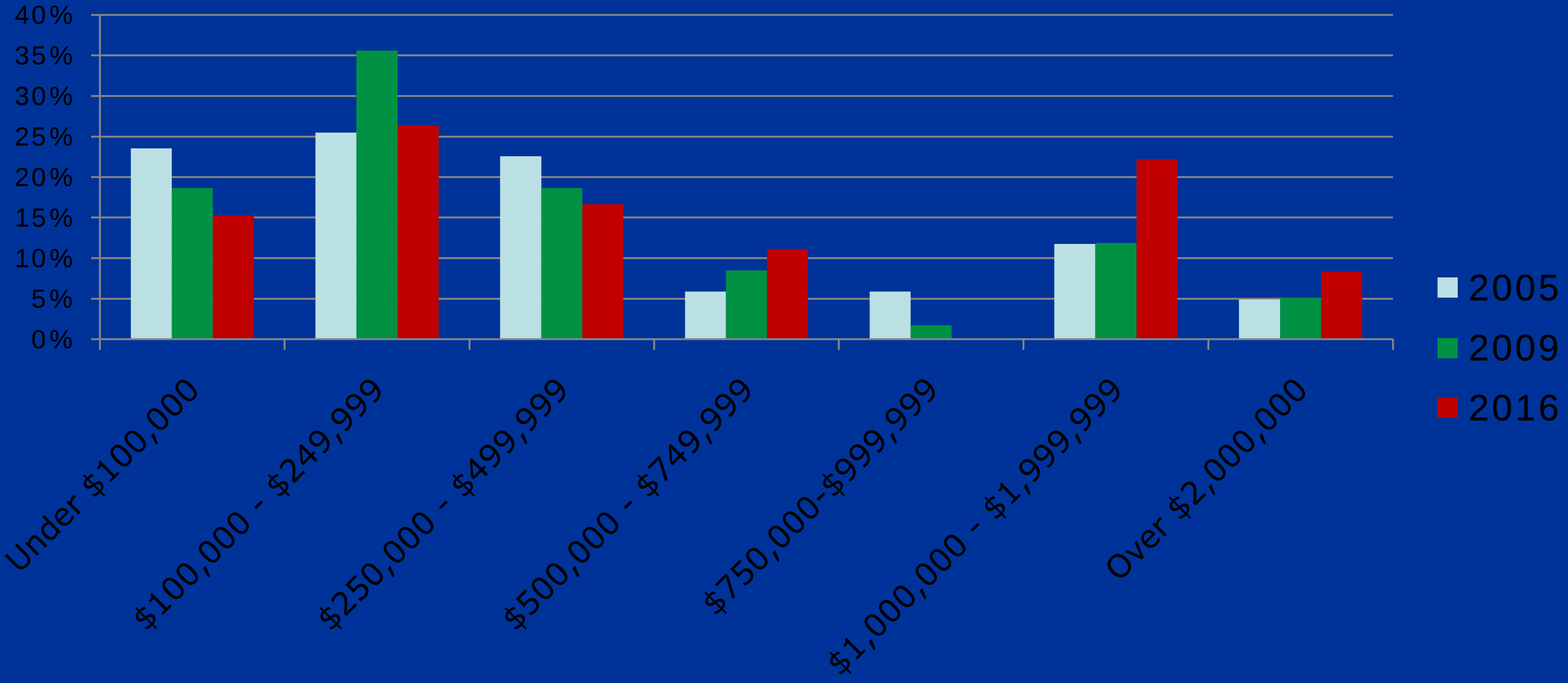
(% reported in 2005, 2009 and 2016 studies)



2005 – over half had more than 10,000; almost 20% 50,000+
2009 – more than one-third estimated serving over 25,000 customers
2016 – close to half had more than 10,000; more than one-third had 35,000+ customers

Total Gross Farm Sales

(percentages)



TGS of $250,000 or more :

2005 – ½ of farms
2009 – less than half (45%) of farms
2016 – 60% of farms

Total Gross Farm Sales

(percentages)

TGS of $250,000 or more :

2005 – ½ of farms
2009 – less than half (45%) of farms
2016 – 60% of farms

Opportunities & Challenges

How question(s) asked changed in each study

2005 – 5 challenges ranked on level of importance (3 categories)

2009 – 9 challenges; weighted averages on 5-pt Likert scale

2016 - plans next 5 years; feelings and experiences in DFM; series of questions addressing 34 types of challenges potentially faced (5 categories)

Opportunities & Challenges

2016

- **9 out of 10 agreed or strongly agreed**
  - **DFM provided a good quality of life**
  - **integrated into the local community**

- **¾ agreed or strongly agreed DFM gave them a positive outlook on the future of farming**

2016 Type of issue (Legal)	Percentage experiencing a challenge
Farm / business taxes [3]	91
Ensuring visitor safety [2]	91
Food safety regulations related to selling [1]	89
Roadside signage permission	83
Local zoning and permits	81

2016 Type of Issue (Business Management)	Percentage experiencing a challenge
Hiring employees	95
The rising cost of energy and fuel [3]	95
Training and managing employees	92
Separating home life from work life	89
Attracting customers	86
Product marketing	84
Succession Planning	66

Notes: 1: on-going identified, common challenge
2: 2005 & 2016
3: 2009 & 2016

Discussions & Recommendations

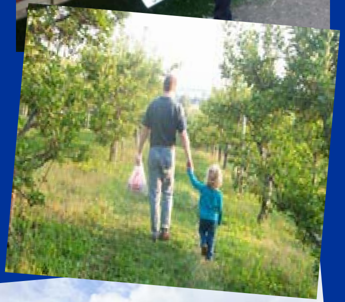
Historical insight into changes in Ontario DFM
(activities on farms, challenges faced, marketing, growth)

Highlighting on-going challenges faced by DFM → programming, advocacy (food safety regulations; visitor safety; energy concerns)

Investigate more robust, systematic and longitudinal approaches for measuring DFM
(e.g., Census of Agriculture, Travel Satellite Accounts)

Geographical comparisons

Periodic studies focused on experiences (2005 economics of DFM & insurance concerns; 2009 consumers; 2016 farm family dynamics and succession & on-farm accommodations)



A Decade of Direct-Farm Marketing Data: The OFFMA Members Survey

Suzanne Ainley, PhD
The Ainley Group

sue@ainleygroup.com

Acknowledgements:
To Georgian College for the use of FluidSurveys and input provided by RAP students: Radhika Sanda, Kayleigh Wilson & Paul Joseph on the 2016 OFFMA Members Study