

# North Dakota Consumer Survey

Report on Consumer Preferences: The Local Grocery Store

North Dakota Association of Rural Electrical and Telecommunications

Mandan, ND

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By

Lori Capouch, Rural Development Director

and

Mary Stumpf, Rural Development Assistant

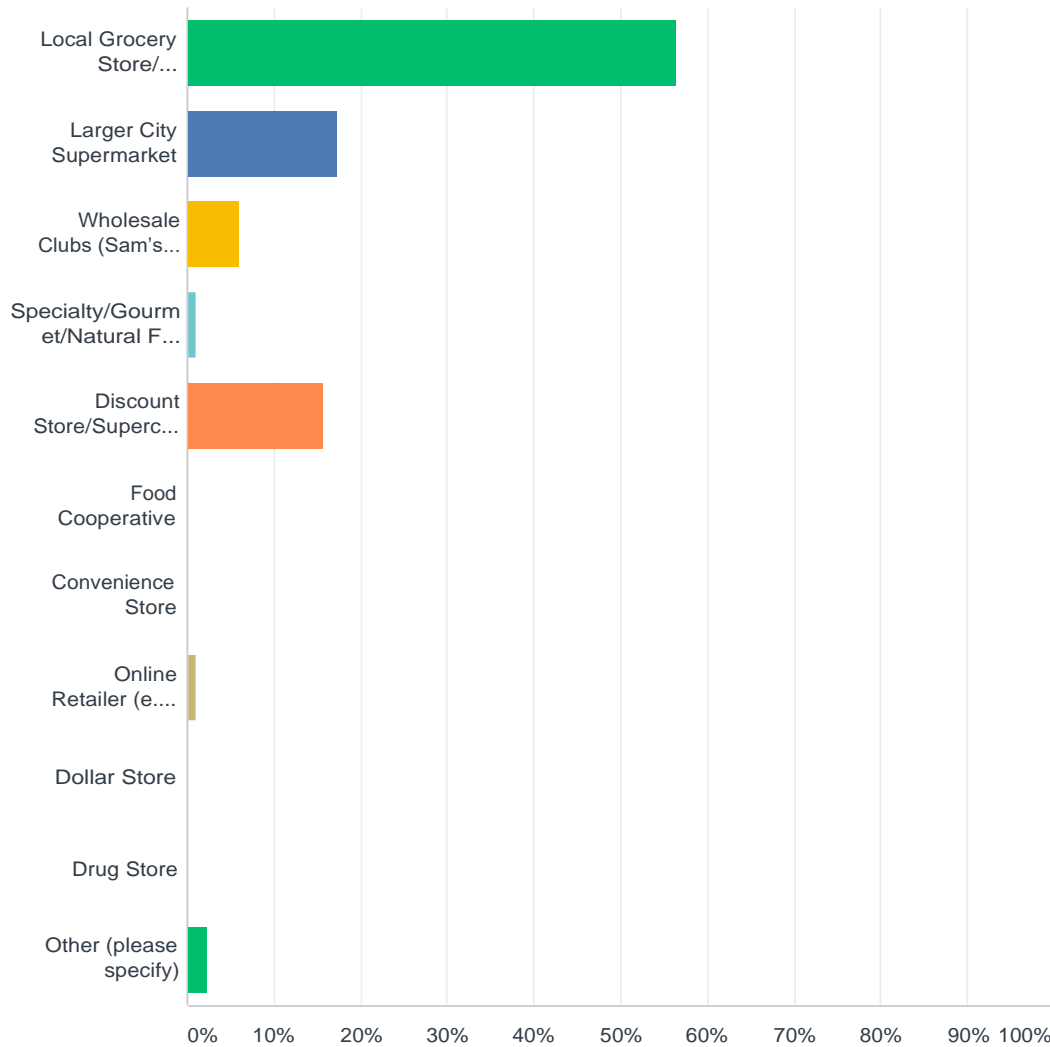
## *Introduction*

This report is an overview of the results of the North Dakota Rural Grocers Consumer Survey conducted from June 2017 to July 2017. The survey was created by the North Dakota Rural Grocery Initiative (NDRGI) taskforce, with the help of N.C. Doty & Associates, LLC and was published to the North Dakota Association of Rural Electric Cooperative's (NDAREC) Facebook page.

The purpose for conducting this survey was to decipher how rural community members view their local grocery store, how they obtain their groceries and if they feel supportive of their grocery store.

As stated above, this survey was available online via a weblink. The number of participants who filled out the survey online was 181.

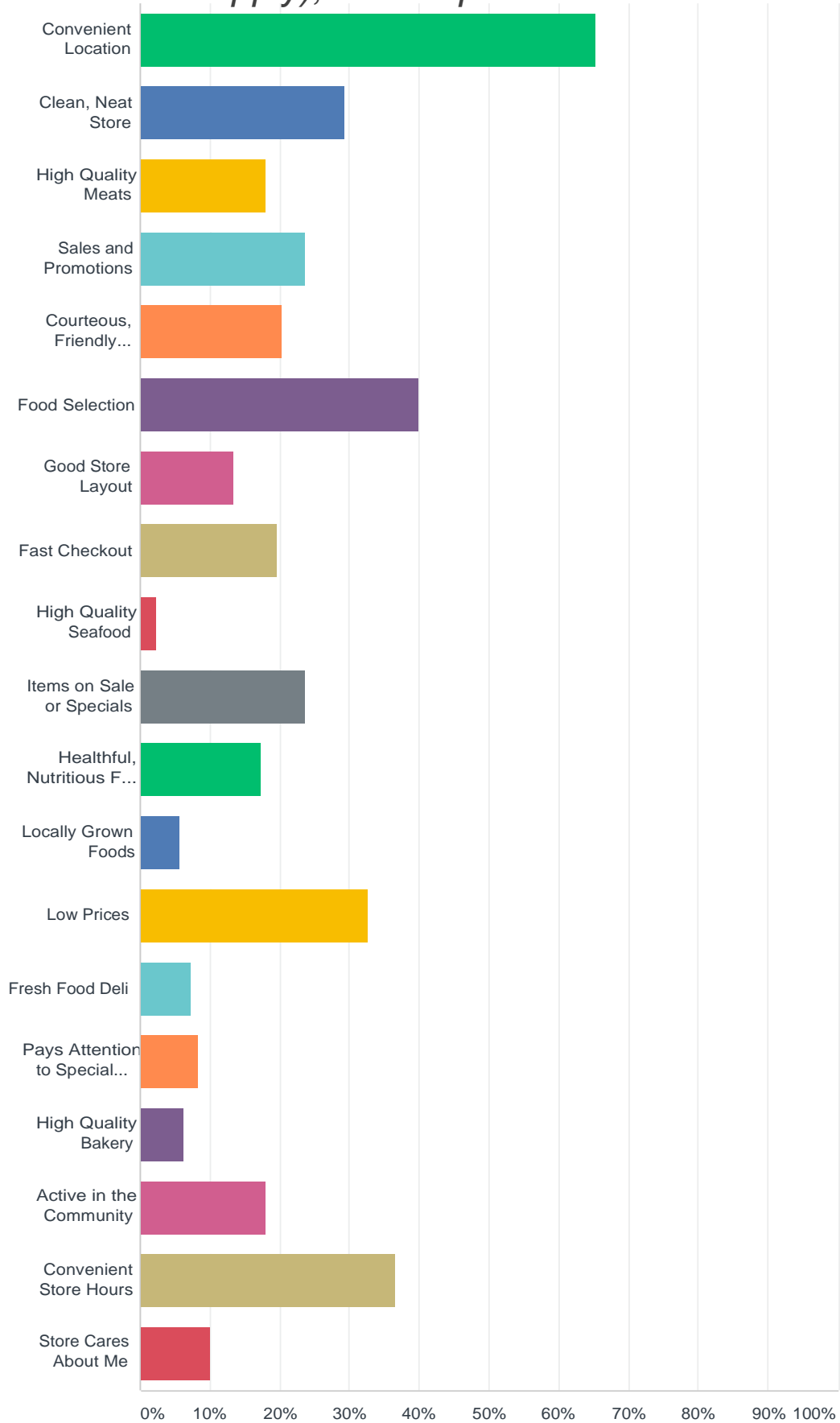
*Majority of food purchases (Check one); 179 respondents*



Answer Choices	Responses
Local Grocery Store/ Supermarket	56.42% 101
Larger City Supermarket	17.32% 31
Wholesale Clubs (Sam's Club, Costco)	6.15% 11
Specialty/Gourmet/Natural Food Store	1.12% 2
Discount Store/Supercenter (Walmart, Target, Kmart)	15.64% 28
Food Cooperative	0.00% 0
Convenience Store	0.00% 0
Online Retailer (e.g.: Amazon, Supermarket Website)	1.12% 2
Dollar Store	0.00% 0
Drug Store	0.00% 0
Other (please specify)	2.23%
<b>Total</b>	<b>179</b>

The vast majority of respondents make the majority of their food purchases from their local grocer store/supermarket.

*Why do you purchase the majority of your foods at your primary food store? (Check all that apply); 178 respondents*

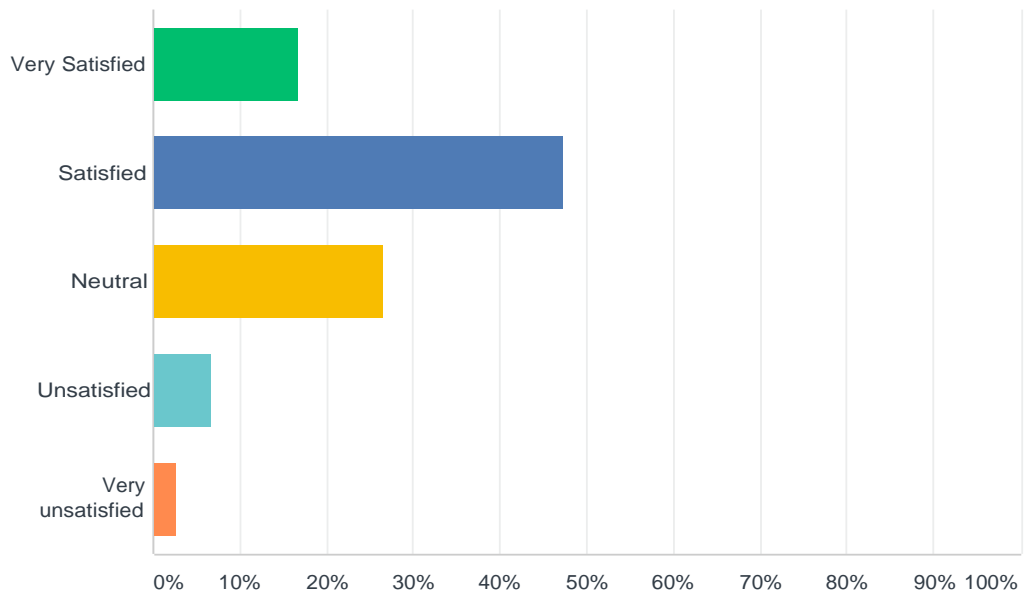


## 2017 North Dakota Rural Grocers Consumer

Answer Choices	Responses	
Convenient Location	65.17%	116
Clean, Neat Store	29.21%	52
High Quality Meats	17.98%	32
Sales and Promotions	23.60%	42
Courteous, Friendly Employees	20.22%	36
Food Selection	39.89%	71
Good Store Layout	13.48%	24
Fast Checkout	19.66%	35
High Quality Seafood	2.25%	4
Items on Sale or Specials	23.60%	42
Healthful, Nutritious Food Items	17.42%	31
Locally Grown Foods	5.62%	10
Low Prices	32.58%	58
Fresh Food Deli	7.30%	13
Pays Attention to Special Requests	8.43%	15
High Quality Bakery	6.18%	11
Active in the Community	17.98%	32
Convenient Store Hours	36.52%	65
Store Cares About Me	10.11%	18
Total Respondents: 178		

The majority of respondents purchase most of their food from their primary store due to the convenient location, followed by the selection offered, convenient store hours and low prices.

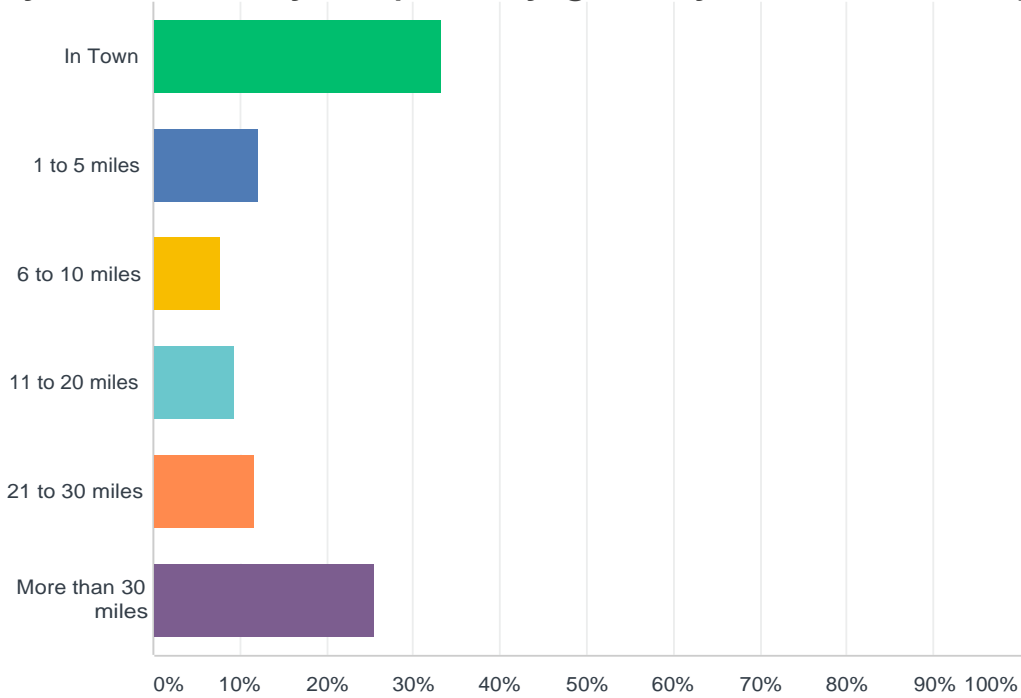
*Satisfaction level of your primary food store satisfying your needs; 180 respondents*



Answer Choices	Responses	
Very Satisfied	16.67%	30
Satisfied	47.22%	85
Neutral	26.67%	48
Unsatisfied	6.67%	12
Very unsatisfied	2.78%	5
<b>Total</b>		<b>180</b>

Over 63% of respondents are at least satisfied with their primary food store.

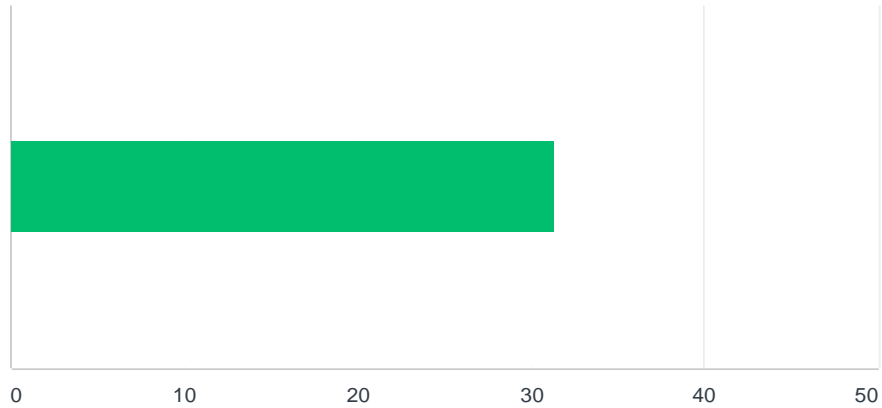
*How far do you travel to your primary grocery store; 180 respondents*



Answer Choices	Responses
In Town	33.33% 60
1 to 5 miles	12.22% 22
6 to 10 miles	7.78% 14
11 to 20 miles	9.44% 17
21 to 30 miles	11.67% 21
More than 30 miles	25.56% 46
<b>Total</b>	<b>180</b>

Roughly 33% of respondents travel within city limits of their primary grocery store. A close second, however, is the fact that over 25% of respondents travel more than 30 miles to reach their primary grocery store.

*On a scale of 0 to 50, with 50 being more burdensome, how challenging do you find the distances to shopping locations; 171 respondents*

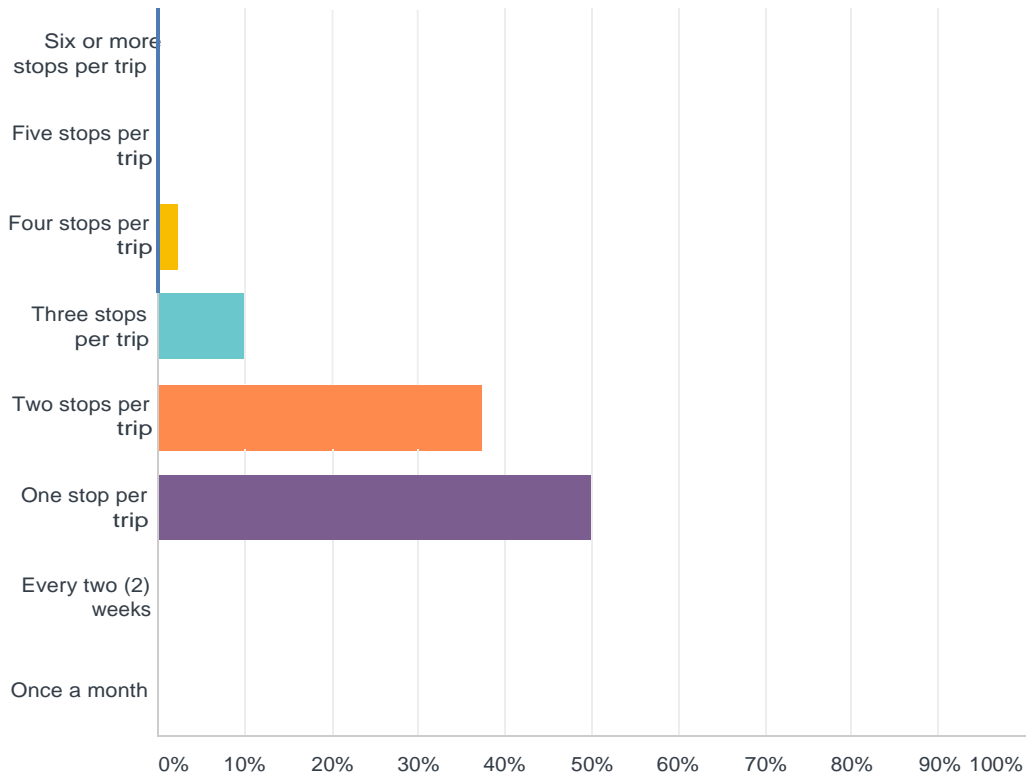


Answer Choices	Average Number	Total Number	Responses
	31	5,366	171
Total Respondents: 171			

The average rating among 171 respondents is 31; slightly towards the “more burdensome” end of the spectrum.



*How many stops do you make to shop for all your food items? (All the food stores that you shop at); 179 respondents*



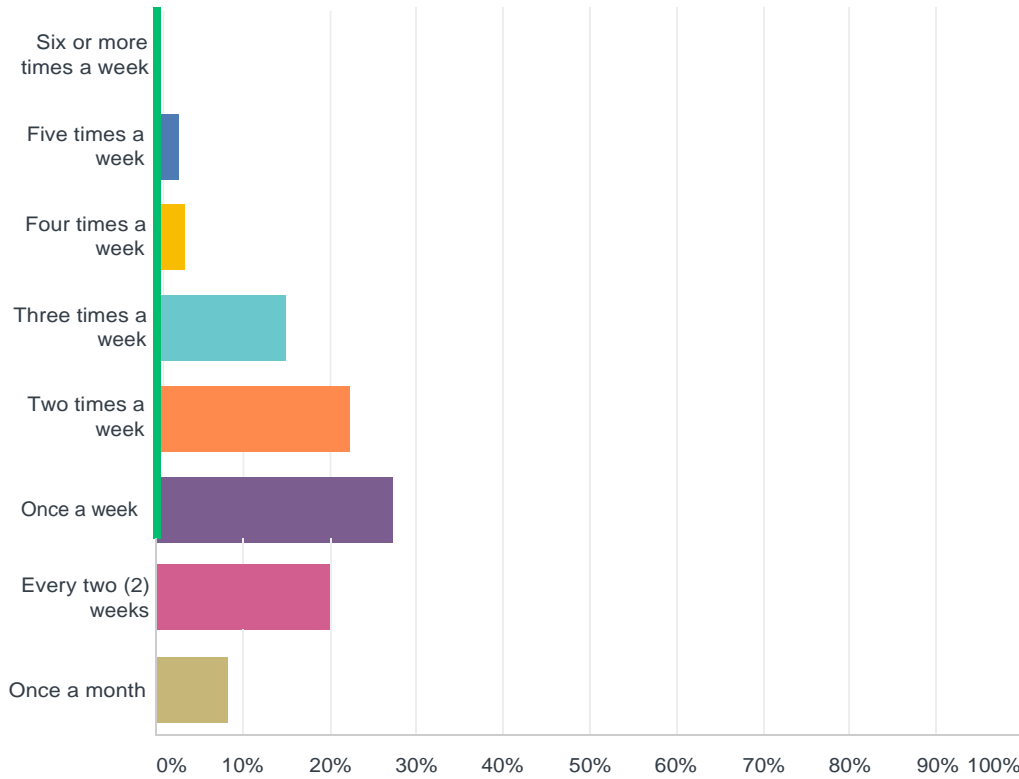
Answer Choices	Responses
Six or more stops per trip	0.00% 0
Five stops per trip	0.56% 1
Four stops per trip	2.23% 4
Three stops per trip	9.50% 17
Two stops per trip	37.43% 67
One stop per trip	50.28% 90
Every two (2) weeks	0.00% 0
Once a month	0.00% 0
<b>Total</b>	<b>179</b>

The vast majority of respondents make one stop per shopping outing to purchase all of their grocery items, while a slightly fewer number of respondents make 2 stops per outing.

*How do you get to these places? (Transit, catch a ride, drive yourself, etc.); 178 respondents*

One hundred percent of respondents drive themselves to the store or ride with someone.

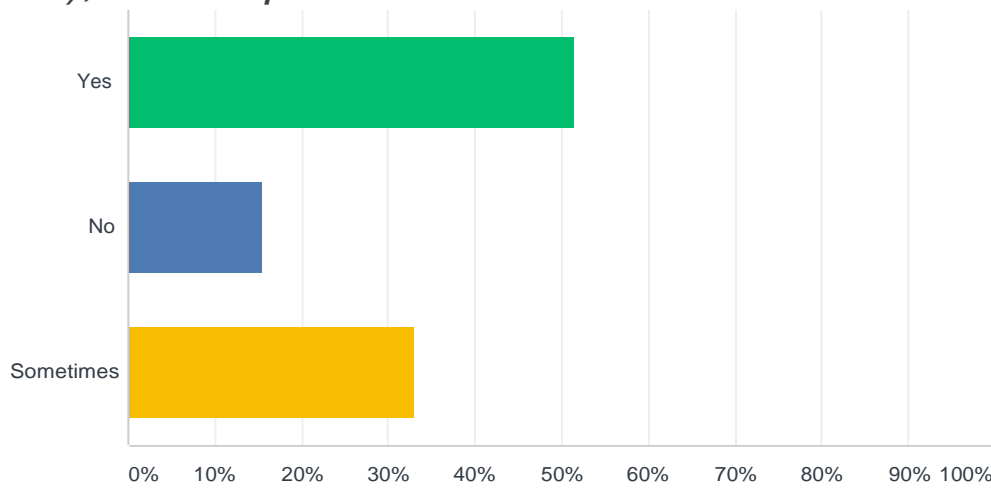
*How many trips per week do you take to your primary food store?; 179 respondents*



Answer Choices	Responses
Six or more times a week	1.12% 2
Five times a week	2.79% 5
Four times a week	3.35% 6
Three times a week	15.08% 27
Two times a week	22.35% 40
Once a week	27.37% 49
Every two (2) weeks	19.55% 35
Once a month	8.38% 15
<b>Total</b>	<b>179</b>

About 27% of respondents shop at their primary food store once per week, followed by 22% twice a week and 19% shop every two weeks.

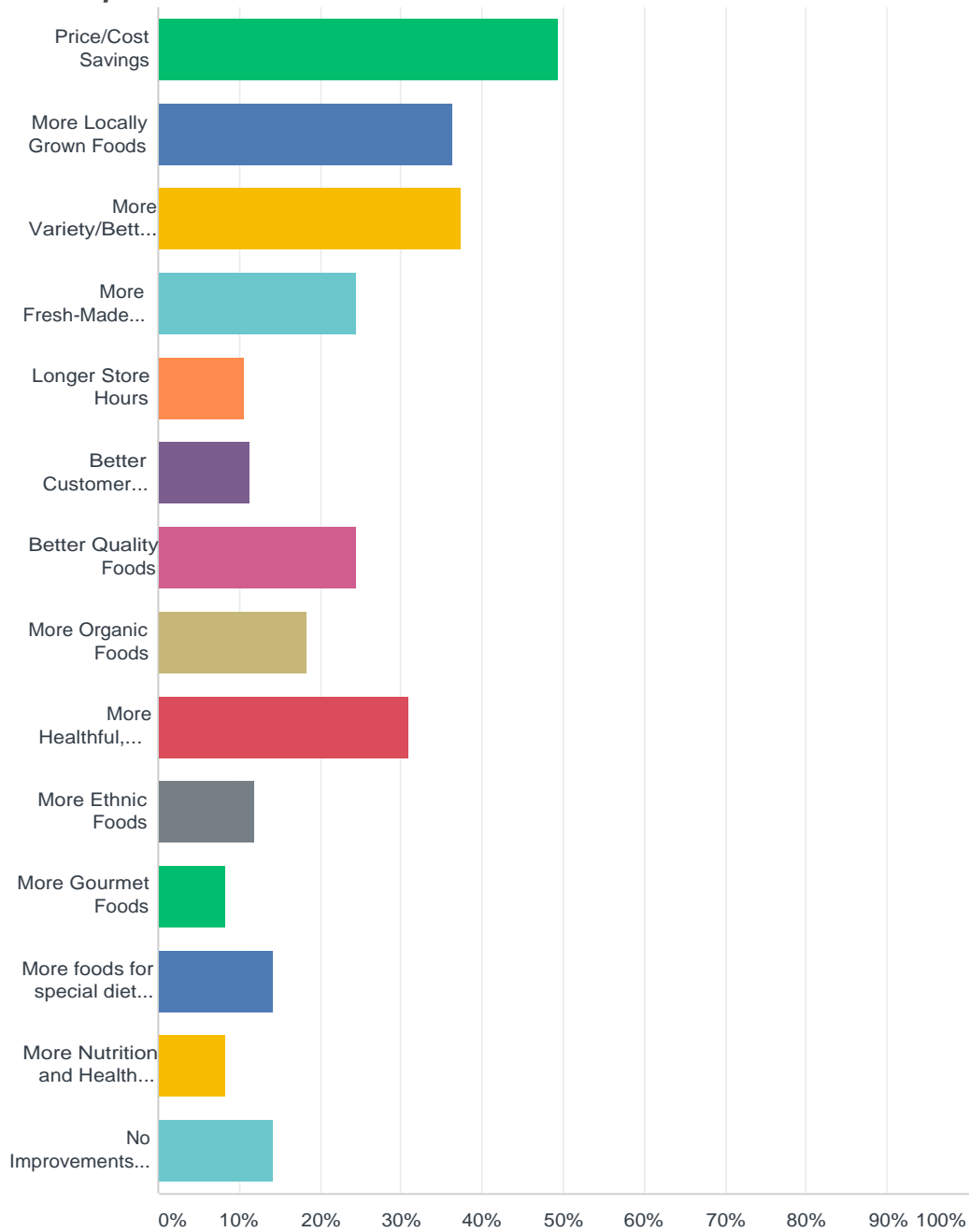
*Do you chain your grocery store trip with other trip purposes (e.g. church or work); 181 respondents*



Answer Choices	Responses
Yes	51.38% 93
No	15.47% 28
Sometimes	33.15% 60
Total	181

Over half of the respondents make other stops when planning a trip to the grocery store.

*What improvements do you want at your primary store? (Check all that apply); 168 respondents*



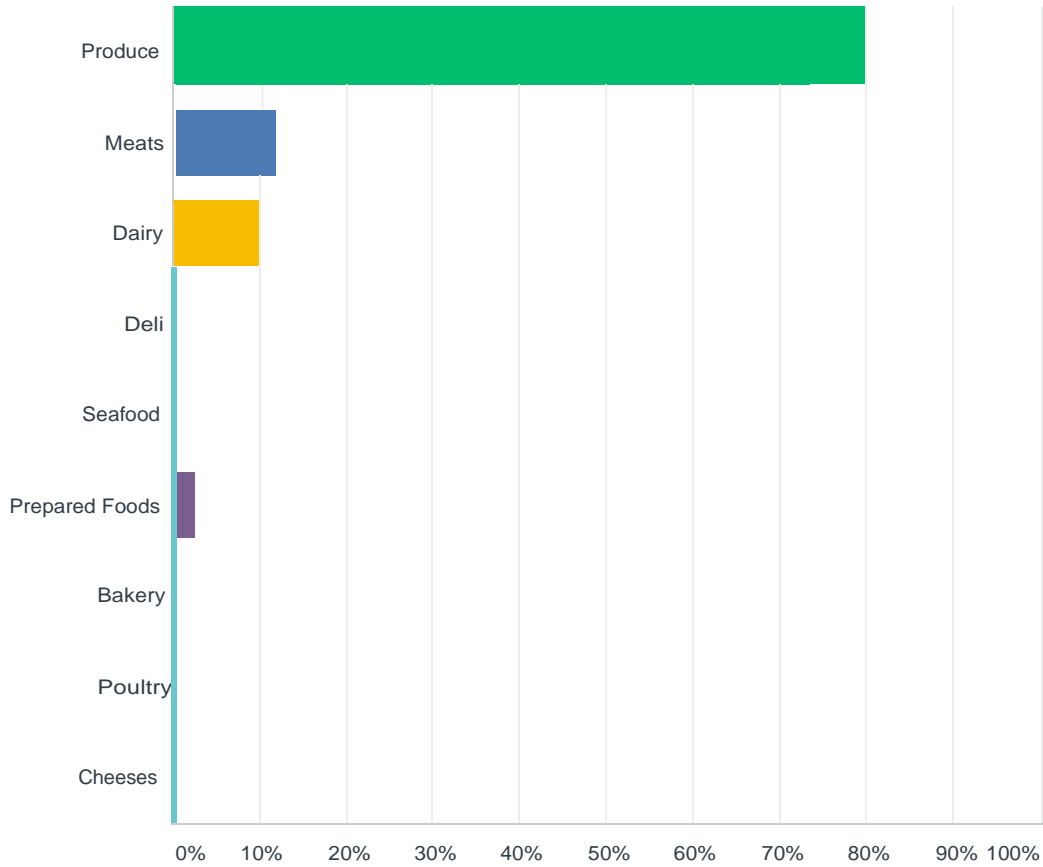
Answer Choices	Responses	
Price/Cost Savings	49.40%	83
More Locally Grown Foods	36.31%	61
More Variety/Better Assortment/Wider Choice	37.50%	63
More Fresh-Made Foods	24.40%	41
Longer Store Hours	10.71%	18

## 2017 North Dakota Rural Grocers Consumer

Better Customer Service/Employees	11.31%	19
Better Quality Foods	24.40%	41
More Organic Foods	18.45%	31
More Healthful, Nutritious Food Items	30.95%	52
More Ethnic Foods	11.90%	20
More Gourmet Foods	8.33%	14
More foods for special diet (diabetes, low salt/sodium)	14.29%	24
More Nutrition and Health Information	8.33%	14
No Improvements are Necessary	14.29%	24
Total Respondents: 168		

Almost half of the respondents are looking for an improvement of cost savings, or price reduction, at their store. More variety followed, more locally grown foods and more healthful, nutritious food items are also on the top of consumers' priority list.

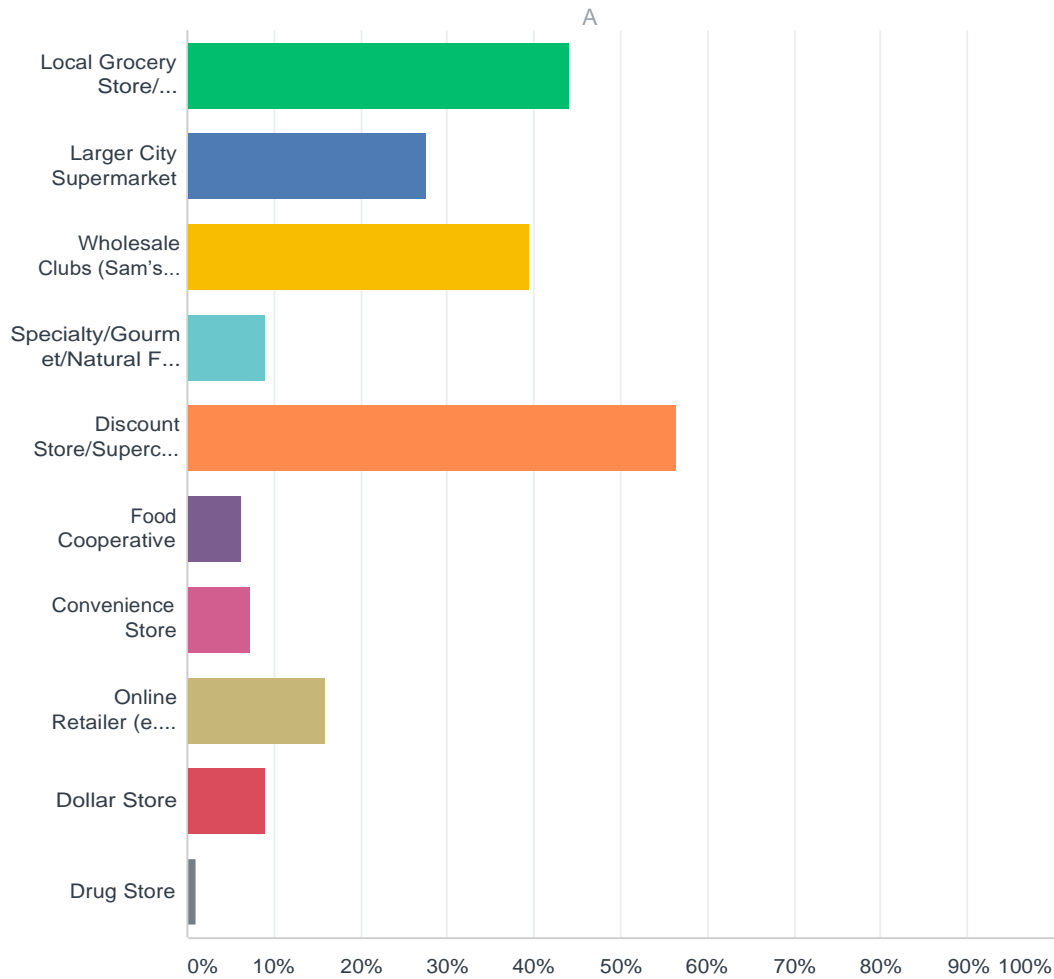
*What is the most important fresh foods department at your primary store?; 179 respondents*



Answer Choices	Responses	Count
Produce	73.18%	131
Meats	11.73%	21
Dairy	10.06%	18
Deli	1.12%	2
Seafood	0.00%	0
Prepared Foods	2.23%	4
Bakery	0.56%	1
Poultry	0.56%	1
Cheeses	0.56%	1
<b>Total</b>		<b>179</b>

Overwhelmingly, the most important fresh foods department for 73% of respondents is produce.

*We have asked about your primary food store. Now we want to ask about your shopping for food at other stores. If you shop at more than one food store, what types of stores do you purchase your foods? (Check all that apply); 177 respondents*

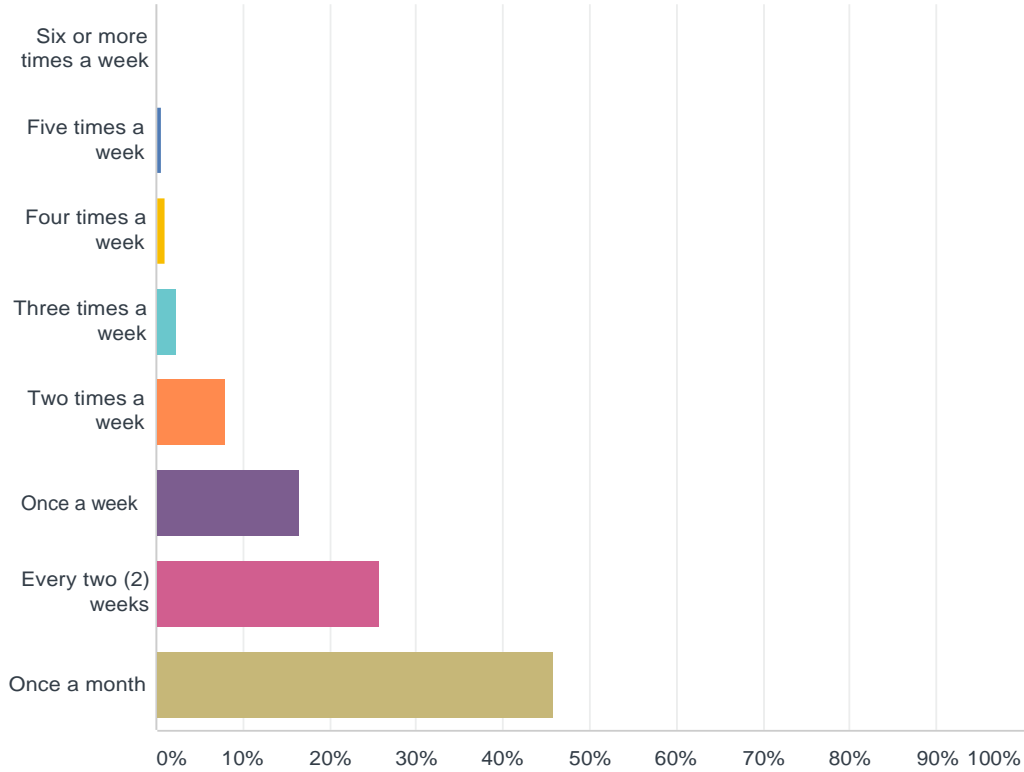


Answer Choices	Responses
Local Grocery Store/ Supermarket	44.07% 78
Larger City Supermarket	27.68% 49
Wholesale Clubs (Sam's Club, Costco)	39.55% 70
Specialty/Gourmet/Natural Food Store	9.04% 16
Discount Store/Supercenter (Walmart, Target, Kmart)	56.50% 100
Food Cooperative	6.21% 11
Convenience Store	7.34% 13
Online Retailer (e.g.: Amazon, Supermarket Website)	15.82% 28
Dollar Store	9.04% 16
Drug Store	1.13% 2

Total Respondents: 177

Other than their primary food store, the discount store/supercenter (Walmart, Target, Kmart) is where the majority of respondents like to shop for their food.

*How many trips do you take on average to shop for food at these other food stores? (All the food stores that you shop at EXCEPT your primary food store); 175 respondents*

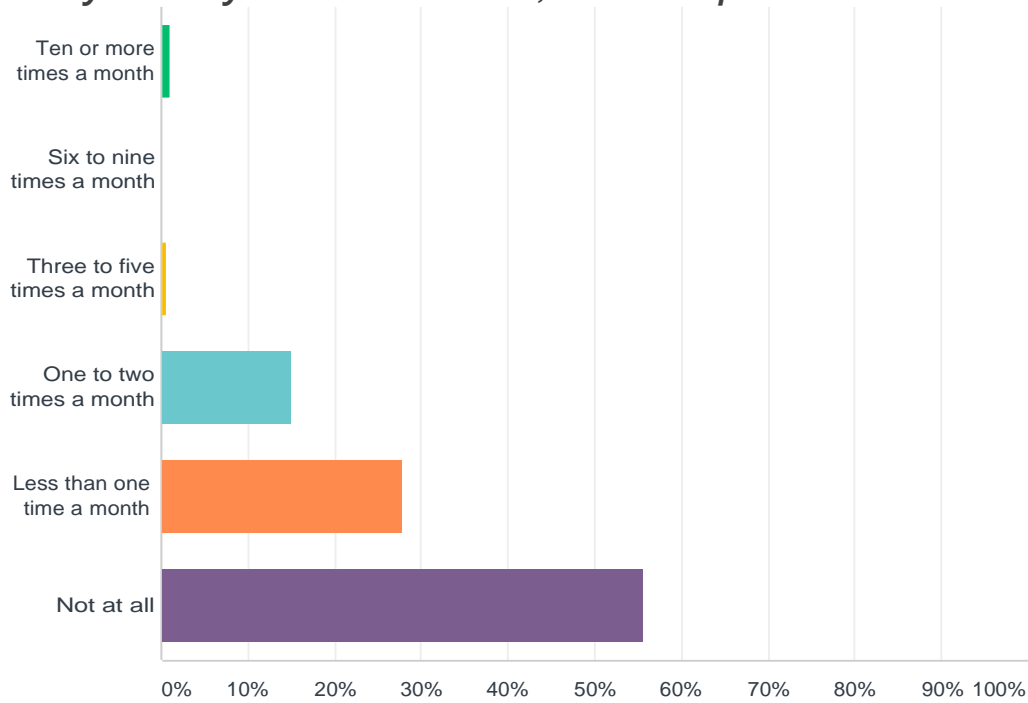


Answer Choices	Responses
Six or more times a week	0.00% 0
Five times a week	0.57% 1
Four times a week	1.14% 2
Three times a week	2.29% 4
Two times a week	8.00% 14
Once a week	16.57% 29
Every two (2) weeks	25.71% 45
Once a month	45.71% 80
<b>Total</b>	<b>175</b>

The vast majority of respondents shop at other food stores once a month or every two weeks.



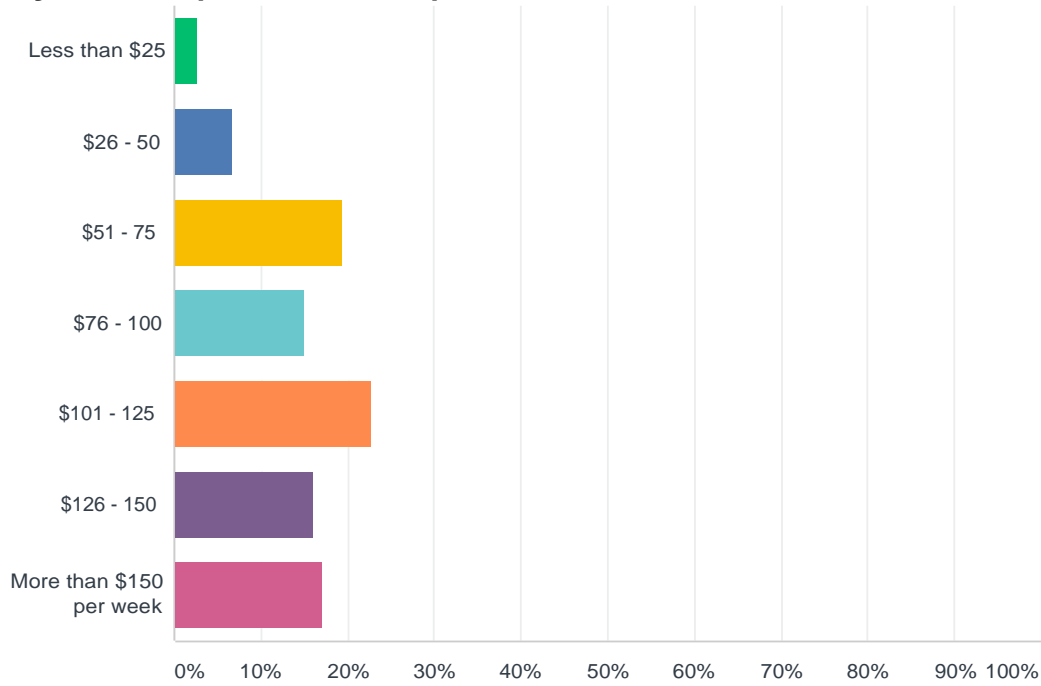
## How often do you buy foods online?; 180 respondents



Answer Choices	Responses
Ten or more times a month	1.11% 2
Six to nine times a month	0.00% 0
Three to five times a month	0.56% 1
One to two times a month	15.00% 27
Less than one time a month	27.78% 50
Not at all	55.56% 100
<b>Total</b>	<b>180</b>

As online purchasing of goods becomes the standard, only 1% (2 respondents) indicated that they shop online ten or more times per month for food. Fifty-five percent (100 respondents) never shop online for their food purchases.

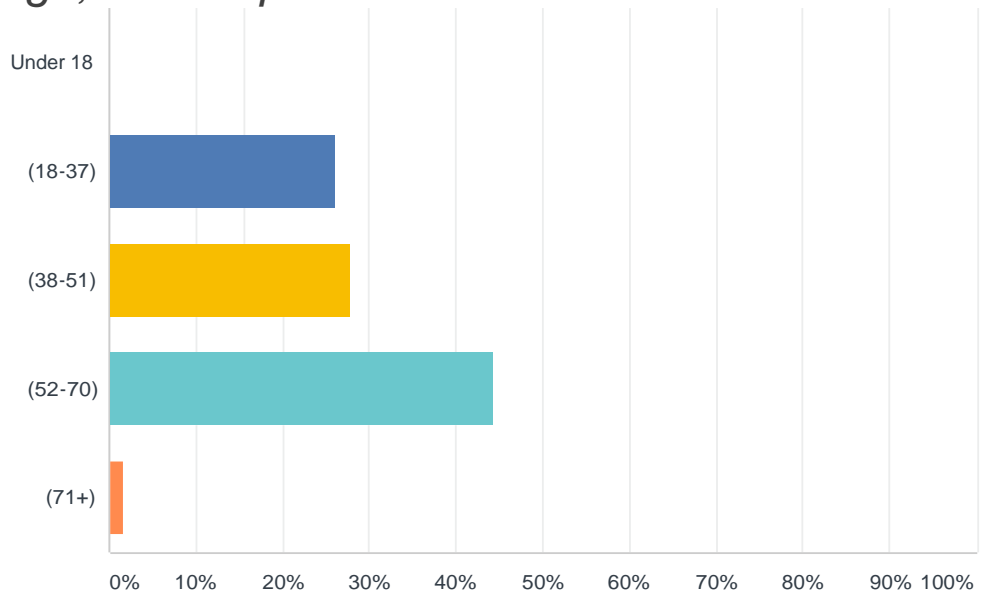
*How much do you spend total each week on foods in all the stores and online that you shop?; 180 respondents*



Answer Choices	Responses
Less than \$25	2.78% 5
\$26 - 50	6.67% 12
\$51 - 75	19.44% 35
\$76 - 100	15.00% 27
\$101 - 125	22.78% 41
\$126 - 150	16.11% 29
More than \$150 per week	17.22% 31
<b>Total</b>	<b>180</b>

There is a pretty even spread among the respondents when it comes to the total dollar amount spent per week on groceries at all the stores and online combined. This is more than likely due to the number of people living in the household.

## Your age range; 180 respondents



Answer Choices	Responses
Under 18	0.00% 0
(18-37)	26.11% 47
(38-51)	27.78% 50
(52-70)	44.44% 80
(71+)	1.67% 3
<b>Total</b>	<b>180</b>

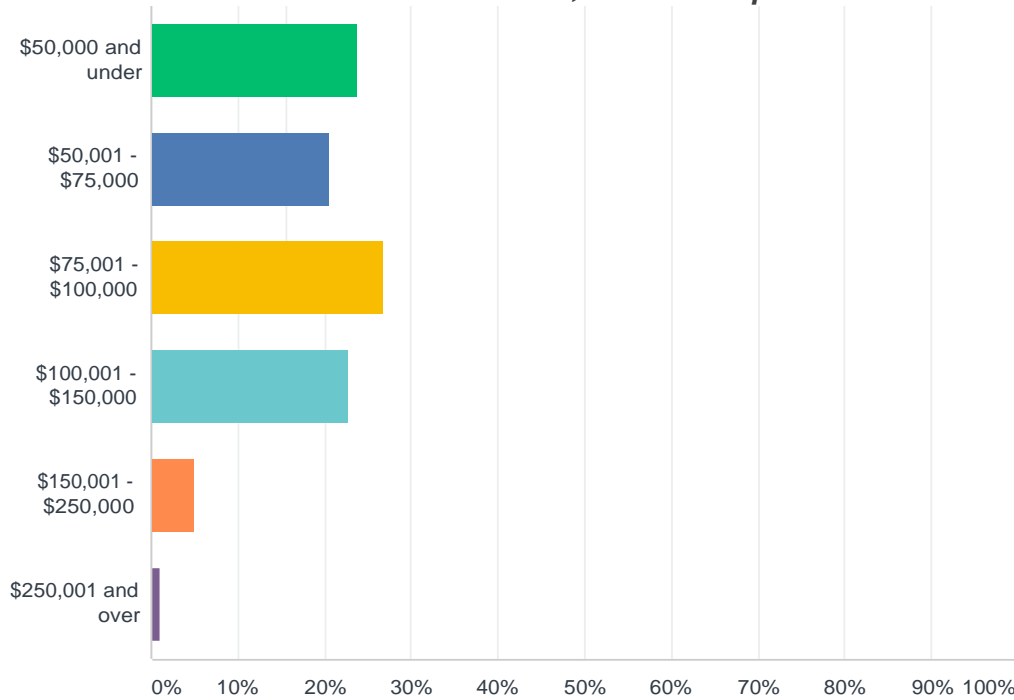
The majority of respondents are between the ages of 18 and 51.

## How many people live in your household?; 181 respondents

Answer Choices	Responses	
Children under 18	69.06%	125
Adults 18 and over	99.45%	180

Among 69% of respondents there is a range of 0-5 children under the age of 18 living in the household. Among 99% of respondents there is a range of 1-5 adults over the age of 18 living in the household, the majority of households having 2 adults.

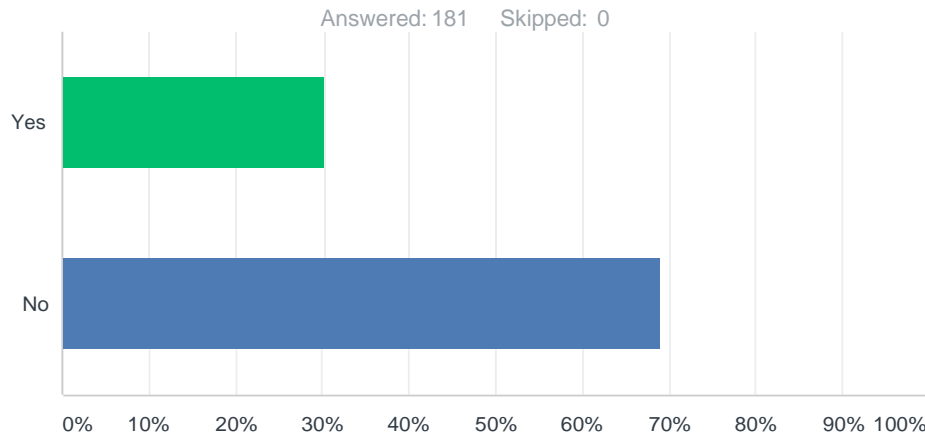
## What is your household income level?; 176 respondents



Answer Choices	Responses	
\$50,000 and under	23.86%	42
\$50,001 - \$75,000	20.45%	36
\$75,001 - \$100,000	26.70%	47
\$100,001 - \$150,000	22.73%	40
\$150,001 - \$250,000	5.11%	9
\$250,001 and over	1.14%	2
<b>Total</b>		<b>176</b>

The income level for 123 respondents (about 70%) is between \$50,000 and \$150,000 per year, compared to 42 respondents, or about 24% who are under the \$50,000 per year income level.

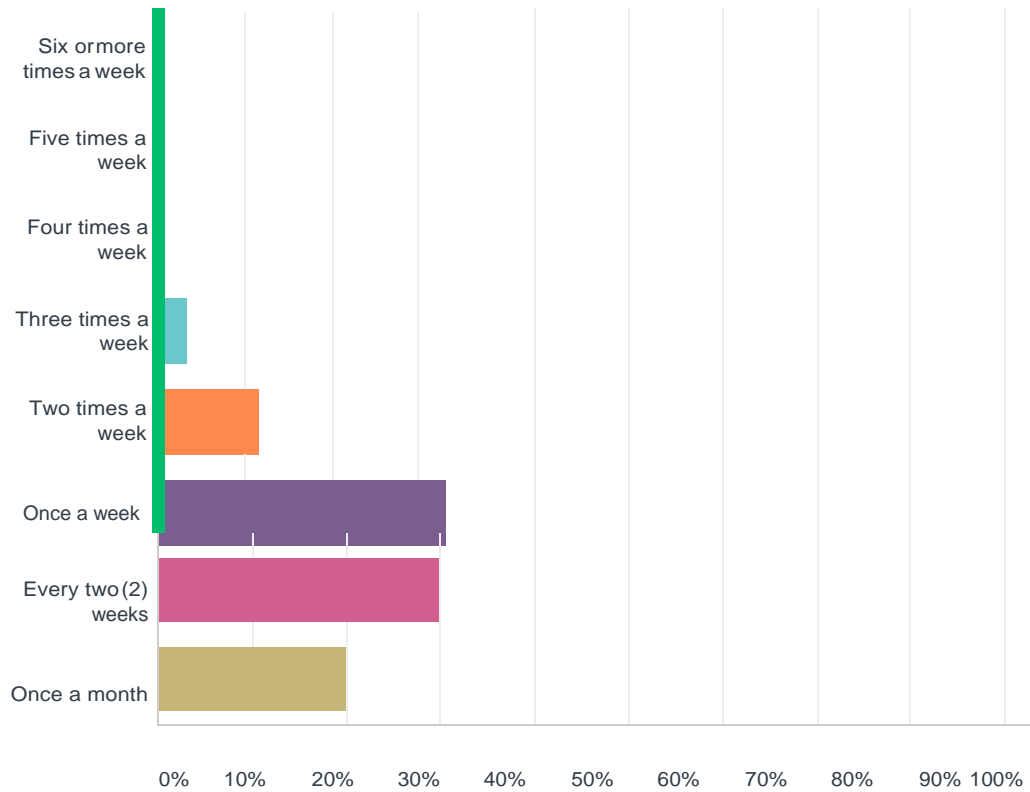
*Are other household members also buying groceries for the household?; 181 respondents*



Answer Choices	Responses
Yes	30.94% 56
No	69.06% 125
Total	181

Most of the respondents to this survey are the primary grocery shoppers in their household.

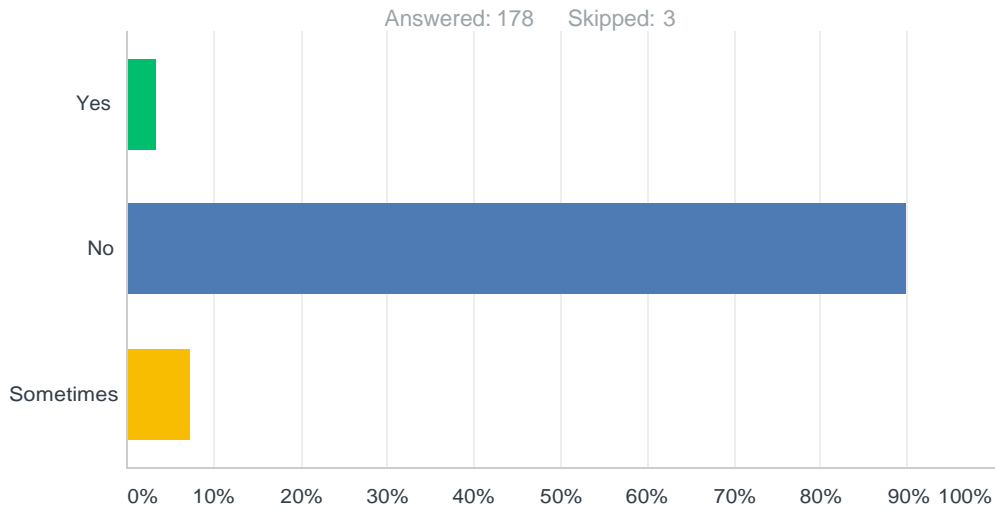
*If yes, how often; 60 respondents*



Answer Choices	Responses
Six or more times a week	1.67% 1
Five times a week	0.00% 0
Four times a week	0.00% 0
Three times a week	3.33% 2
Two times a week	11.67% 7
Once a week	33.33% 20
Every two (2) weeks	30.00% 18
Once a month	20.00% 12
<b>Total</b>	<b>60</b>

The majority of respondents indicated that others in the household purchase groceries once a week to every two weeks.

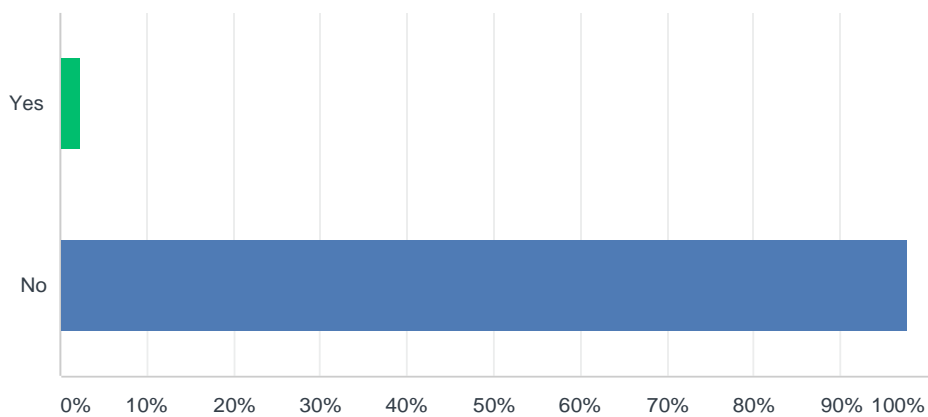
*Does anyone outside the household make grocery purchases for you?; 178 respondents*



Answer Choices	Responses	Count
Yes	3.37%	6
No	89.33%	159
Sometimes	7.30%	13
Total		178

The vast majority of respondents make their own or have someone from the household make the grocery purchases.

*Do any social services provide access to groceries?; 179 respondents*



Answer Choices	Responses	Count
Yes	2.23%	4
No	97.77%	175
Total		179

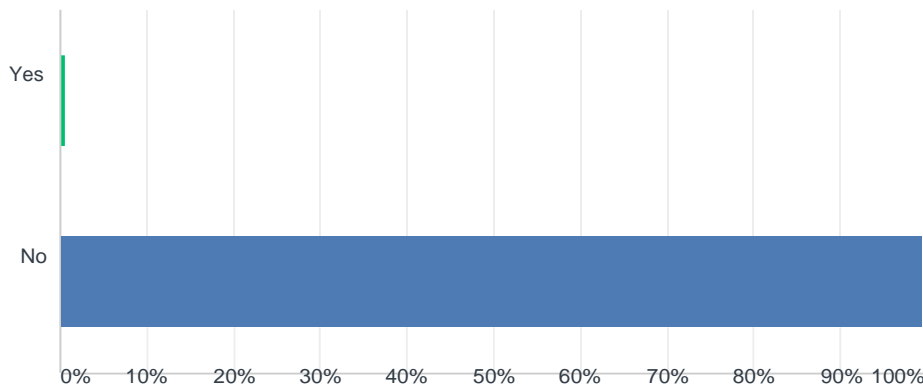
Only 4 respondents use social services to provide them access to groceries.

*If yes, which services help provide access?; 5 respondents*

Responses
food pantry, SNAP
The grocery store will deliver
Food pantry
Pembina County Transportation Faith in Action
Welcome

It seems as though respondents who use social services rely their local food pantry's, faith groups, and their local grocer to help them have access to food.

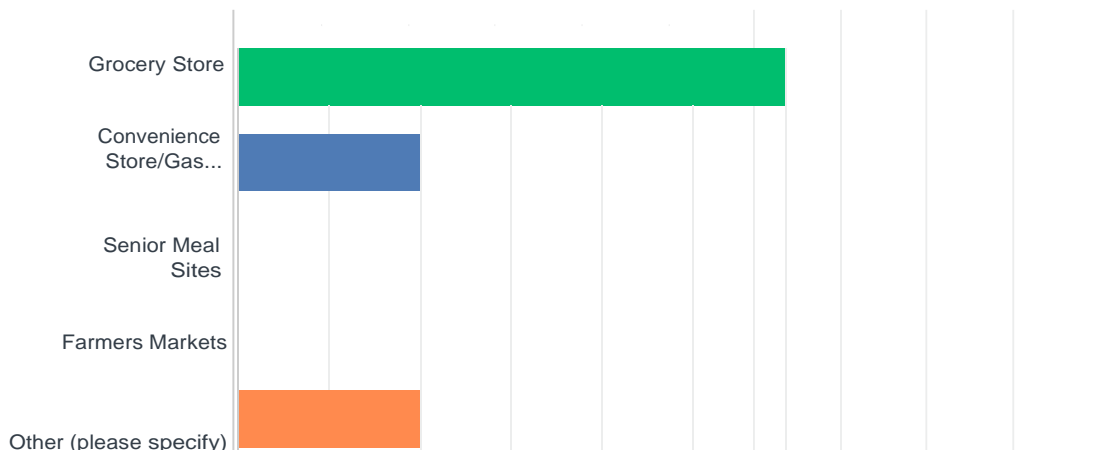
Do you use a SNAP/EBT card to purchase food?; 179 respondents



Answer Choices	Responses
Yes	0.56% 1
No	99.44% 178
Total	179

Only one respondent indicated the use of a SNAP/EBT card to purchase groceries.

*If yes, where are you purchasing food? (select all that apply); 5 respondents*





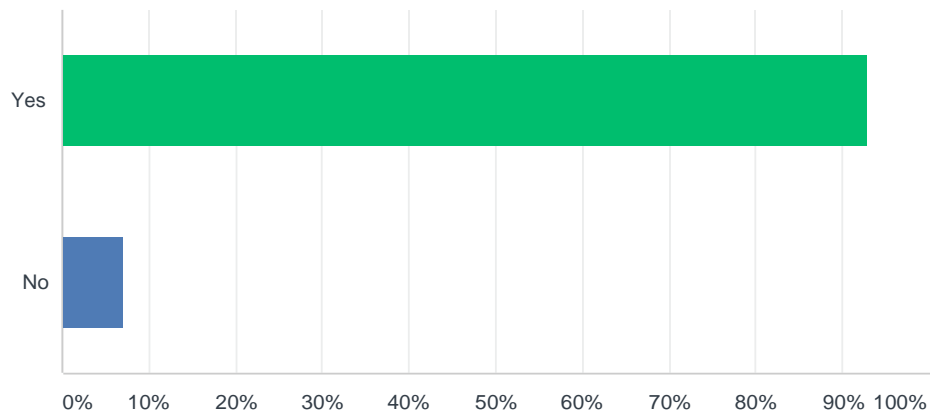
## 2017 North Dakota Rural Grocers Consumer

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Answer Choices	Responses	
Grocery Store	60.00%	3
Convenience Store/Gas Station	20.00%	1
Senior Meal Sites	0.00%	0
Farmers Markets	0.00%	0
Other (please specify)	20.00%	1
Total Respondents: 5		

Of those respondents who use SNAP/EBT to purchase food, three respondents purchase food from the grocery store and one from a convenience store.

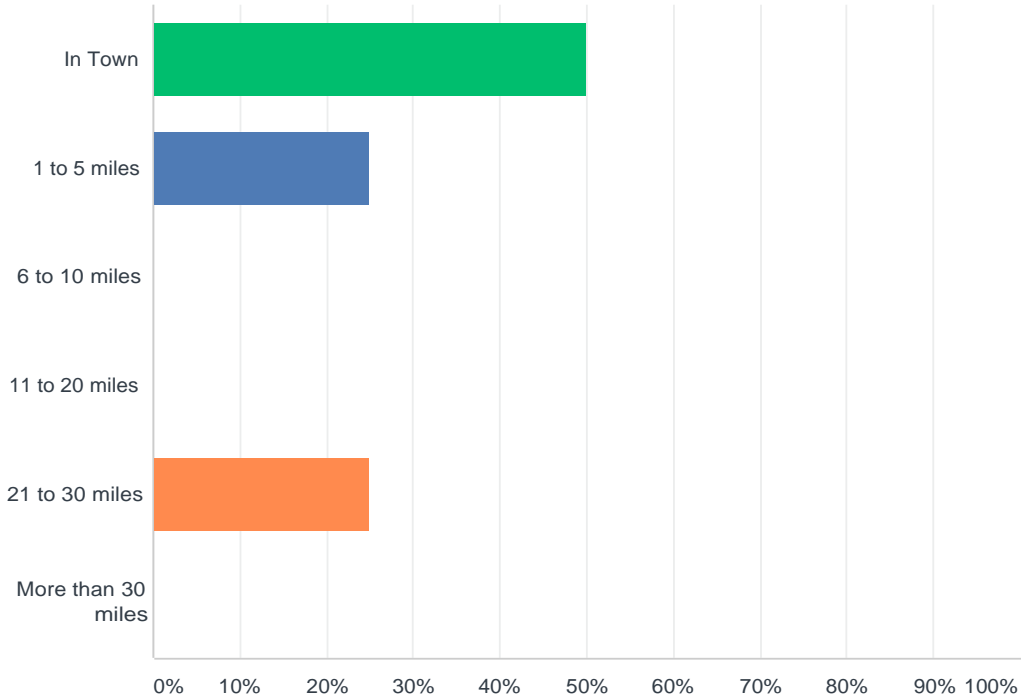
## *Does your local grocery store accept SNAP/EBT benefits?; 113 respondents*



Answer Choices	Responses	
Yes	92.92%	105
No	7.08%	8
Total		113

Almost 93% of respondents believe that their local grocery store accepts SNAP/EBT benefits.

*If no, how far are you driving to use your SNAP/EBT card to purchase food?; 4 respondents*



Answer Choices	Responses	Count
In Town	50.00%	2
1 to 5 miles	25.00%	1
6 to 10 miles	0.00%	0
11 to 20 miles	0.00%	0
21 to 30 miles	25.00%	1
More than 30 miles	0.00%	0
<b>Total</b>		<b>4</b>

Four respondents indicated that they are driving up to 30 miles in order to use the SNAP/EBT card to purchase food.

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 Additional comments; 25 respondents

#	Responses
1	Senior meals are delivered to our local town hall 3 days per week.
2	I am still driving and active. However, it is imperative that my hometown grocery stays vibrant for me to stay in my home if failing health prompts me to stop driving 30 miles to the next city
3	I believe that just because we live in rural america that the local food stores have to only carry unhealthy foods to stay in business. There are so many health disparities in this part of the country. I think food is one of our greatest preventions in staying healthy!
4	We have a large garden and also raise our own meat, eggs, and have milk cow. Our grocery budget is \$180 per month for 2 adults, which is plenty since we raise a lot of our food.
5	I live in town with no grocery store. I can barely walk & cant carry anything. I havent been to grocery store in 18 months. Amazon and Walmart online is my only food sources. Have not had bread, milk, produce, fresh meat in that time. I have written letters to 7 grocery stores asking them to shop for me, and I would pay them to do it, then I would drive there and they could load it in my vehicle. There is not one store that even answered my letters. Thats why I rate customer service so poor. I pretty much live off boxed mac & cheese and canned soup I can get online. When you cant walk to get in the store & they wont pick the items for you, it doesnt matter what they have to sell cause you cant get to it to buy it. I told them I would give them a \$500 order each time.. No responce. This includes major store chains & privately owned stores too. If you cant dance down the isles, they dont want your business. It sucks.
6	We have a local grocery store within 1 mile of us however the options are very limited. We mostly purchase fresh produce from the store and the quality at the local store is terrible so we don't use the local store unless we know they have something we need if we need it right now and cannot order online to be here in time or if we're not going to Minot or Bismarck in the near future. When we are in Minot or Bismarck we stock up on grocery's to get us by for a couple weeks until we will be in one of those towns again. We frequent those towns enough that we make it work, so it's not a huge inconvenience for us, however the biggest thing would definitely be better access to fresh produce at our local store.
7	It is difficult and expensive to provide healthy meals to my family based on what's available locally, but it is still easier to shop there than drive the 160-miles roundtrip to the nearest superstore.
8	We value our local grocery store and try to support it as much as possible. Unfortunately due to the more convenient hours, greater variety, lower prices, and fresher produce we often end up shopping at the Walmart in our town.
9	I would love to have access to more locally grown foods in our community ( <i>removed location</i> ). Our local grocery store is very expensive, especially for young families who are trying to feed their children healthy nutritious meals.
10	I would like our local grocery stores to carry a greater variety of items so that I wouldn't have to drive 60 miles to get the things that I want. I would much rather shop locally.
11	Our small store is above average and the employees do their best to meet special needs such as large orders for group events. They do what they can to assist us, such as slicing or cutting ham, selecting good quality produce, etc. Unfortunately, they don't seem to be able to compete pricewise on some products. I won't drive farther just to grocery shop, but will get some things if I am going out of town anyway.
12	I am very worried about the survival of our local grocery store
13	Travel every 2 weeks at least 35 miles to get groceries including product as the store only 20 miles away and in the town I work does not have a good produce selection but will grab a few items including milk, bananas, etc. there. Do also get milk at local convenience store which is in my small town but otherwise travel to get food and do online shopping for bulk items like cleaning products, breakfast cereal/bars (subscribe and save), and also order from Alison's pantry monthly for frozen items.
14	We don't have a local grocery store, only a meat store and a bar.
15	Grocery shopping is the least favorite thing I have to do so I rely on my local grocery store to make it a pleasant and convenient shopping experience (which they do!) I will pay the higher prices to shop local.

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16	Don't know what Snap/ebt card is?
17	Produce and meat products are important to me. I shop at local and Bismarck meat markets, farmers markets and fruit clubs, primarily because of freshness and quality
18	The grocery prices in ( <i>removed location</i> ) are very high. All of the Marketplace Food stores are very expensive. So unfortunate as we live 3 blocks from one. Instead we have to drive a mile to Cashwise or farther to Walmart. I despise going to Walmart but a person doesn't have much of a choice for the staples.
19	Our local grocery store frequently has out of date/spoiled food. It's frustrating that the selection is so limited.
20	na
21	We buy in bulk and that is what decides where we buy most of our food. No bulk sales, not much we buy elsewhere.
22	My daughter brings a lot of my groceries home from Wal Mart. Also, I make several purchases a week at our local bakery which includes bread, buns and baked goods.
23	The local grocery store has exorbitant prices and an owner who treats customers and employees like dirt.
24	If our local store ( <i>location removed</i> ) actually treated people like they mattered instead of like crap, we'd gladly overlook the high prices. But if we're to be treated badly, I would rather take my hard earned money to a place that actually had favorable prices and a larger selection
25	Grocery stores are the lifeblood of rural towns. We need to find ways to keep them open, through coops and/or other creative means.

Respondents were very upfront about what they like or do not like about their local grocery store. A theme among these comments are that people would like to support their local grocery stores, but it is difficult to afford when trying to feed a family; or that consumers are looking for better quality produce.

## Summary

### *Consumers are Satisfied*

This survey revealed some interesting insights into the rural consumer. More than half of the survey respondents indicated that they are either very satisfied or satisfied with their primary food store. They purchase groceries at their local store because of the convenient location, the selection of food, the store hours, and the low prices.

### *Rural Residents and Traveling*

The majority of respondents travel within city limits to shop, however over twenty-five percent travel more than 30 miles to purchase food at a grocery store. This group of respondents indicated that they travel about one to two times per week to shop for food, making one stop at their primary food store per trip.

### *Looking for Improvements*

Respondents indicated that they'd like to see a better price/cost savings, more variety and more locally grown foods, and healthier options offered at their primary food store.

### *Secondary Food Stores and Online Purchasing*

As a secondary source of food, survey respondents indicated that they shop at discount supercenters (Walmart, Target, Kmart) about once a month, and hardly any of the

2017 North Dakota Rural Grocers Consumer  
respondents shop for food online.

### *Weekly Budget for Food*

In terms of how much the rural consumer spends per week on foods from all stores they shop at, including online, the range is pretty even. Consumers spend between \$51 and \$150 per week, depending on how many people live in the household.

### *Demographics*

The age of most consumers who completed the survey are between 18-51 and 52-70; a pretty even split. Most respondents indicated that they live in a household with two adults, and the income level ranges between \$50,000-150,000 annually. Of those who completed the survey, most are the primary grocery shoppers of the household.

### *Using Social Services*

Very few who filled out the survey use social services to help provide access to food. The few who do use social services use SNAP/EBT benefits at their grocery store. Almost all respondents believe that their local grocery store accepts SNAP/EBT benefits. Those whose local grocery stores do not accept SNAP/EBT are driving up to 30 miles to use their SNAP/EBT cards to purchase food.