

Robert M. Kerr Food & Agricultural Products Center



FOOD TECHNOLOGY FACT SHEET

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Findings from the Made in Oklahoma Coalition 2015 Consumer Perceptions Survey

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Introduction

In 2002, the Made In Oklahoma (MIO) Coalition launched an extensive marketing campaign, with then-Gov. Frank Keating declaring April to be “Made In Oklahoma Month.” The governor and lieutenant governor sponsored public service announcements about MIO products and their importance to the Oklahoma economy.

The MIO Coalition membership has changed in the past 13 years, yet the Coalition’s mission to promote the general message and value of “Made In Oklahoma” to consumers remains unchanged. The State of Oklahoma has assisted in these promotional efforts, and the Coalition has responded by assessing and reporting the impacts of these efforts. In 2005, the Coalition commissioned a household survey to determine consumer awareness of Made In Oklahoma Month (Stone et al. 2006). In subsequent years, the Coalition has also commissioned studies to show the economic impacts of its members (e.g. Willoughby et al. 2013).

For 2015, the Coalition is pursuing two separate but related studies: (1) an in-store assessment of consumer awareness for Coalition member brands and (2) a statewide household survey examining the value consumers place on Made In Oklahoma products. This report discusses findings from the in-store consumer awareness survey.

In-Store Awareness Survey

In March 2015, members of the Coalition and members of the Robert M. Kerr Food & Agricultural Products Center (FAPC) at Oklahoma State University conducted a survey of shoppers at two independent supermarkets: Consumers IGA

in Stillwater and Crest Foods in Norman. The surveys took place on different days; the Stillwater survey was on Tuesday, March 10, and the Norman survey was on Sunday, March 15.

The survey consisted of nine questions and was conducted using the same instrument at both locations. Shoppers were asked to participate in the nine-question survey as they entered the store. For participating in the survey, respondents were offered their choice of either a reusable shopping bag or a small bottle of hand sanitizer.

Ninety-two surveys were collected at the Stillwater store, and 53 surveys were collected at the Norman store. Not all respondents answered all questions on the survey. Survey results were aggregated and analyzed by FAPC representatives.

Made In Oklahoma Impacts on Purchase Decisions

Respondents were asked if the fact that a food product was Made In Oklahoma made them more likely to buy the product. As a follow-up question, respondents were asked if they “actively seek” MIO products when shopping. Results are shown in Table 1.

Roughly 86 percent of respondents indicated they were more likely to buy a food product if it was a MIO product. However, only about 49 percent said they actively seek MIO food products when shopping. The disparity between these two numbers may be due to a variety of reasons, including shopper price sensitivity and consumer demand for products with no MIO alternative (e.g. most fresh produce items, canned products and various dry packaged food products).

Table 1: Shopper responses to survey questions related to MIO product purchases.

<i>Does the fact that a food product is Made In Oklahoma make you more likely to buy the product?</i>		
	Number of responses	Percent of Responses
Yes	125	86.21%
No	14	9.66%
Did not answer	6	4.14%
<i>When you shop at the grocery store, do you actively seek food products that are Made In Oklahoma?</i>		
	No. of responses	Percent of Responses
Yes	71	48.97%
No	68	46.90%
Did not answer	6	4.14%

Shopper Familiarity with MIO Coalition Companies/Brands

A primary goal for Coalition companies is increased brand awareness and sales of their respective products. Unlike previous Coalition studies, this survey asked shoppers to list up to five MIO Coalition companies/brands, which they were most familiar. It should be noted that shoppers were asked to complete the survey as they entered the store, before they had a chance to walk the aisles and search for MIO brands. Additionally, at both stores the survey tables were inside the stores but not near any MIO product displays/specials.

Table 2 shows the results from this question. Respondents mentioned not all Coalition companies, but the 15 listed in Table 2 were listed by at least one survey respondent. Companies and brands are combined, i.e. “Griffin’s pancake

Table 2: Shopper familiarity with MIO Coalition brands (upon entering the store).

Which five Made In Oklahoma Coalition companies/brands are you most familiar with?

	Number of Responses	Percent of Responses
Advance Pierre Foods	1	0.69%
Andrews Honey Bees	1	0.69%
Bama Companies	1	0.69%
Bar-S Foods	14	9.66%
Billy Sims BBQ	2	1.38%
Chef’s Requested	1	0.69%
Clements Foods	2	1.38%
Griffin Foods	30	20.69%
Head Country	37	25.52%
Hiland Dairy Foods	16	11.03%
Krebs Brewing Company	1	0.69%
Ozarks Water	5	3.45%
Ralph’s	10	6.90%
Shawnee Mills	37	25.52%
Suan’s Foods	2	1.38%

syrup” was counted as “Griffin Foods” and “Bar-S hot dogs” were counted as “Bar-S Foods.” It should be noted that some respondents dropped by the table after shopping to say they were reminded of several MIO Coalition brands while in the store. This may be due to displays/specials for those products in the store or the connection to Made In Oklahoma upon seeing a product label.

The most recognized Coalition brands were Head Country and Shawnee Mills with roughly one-in-four shoppers (25.52 percent for each) linking those brands/companies to Made In Oklahoma. Griffin Foods, who is identified as a MIO brand by 20.69 percent of responding shoppers, was also one of the most recognized Coalition members. Others often recognized as Coalition companies by shoppers were Hiland Dairy Foods (11.03 percent) and Bar-S Foods (9.66 percent).

Several Oklahoma-based, but non-Coalition, brands and companies were also listed by respondents. This may indicate that the Coalition’s Made In Oklahoma marketing message has a broader general impact on consumers as opposed to emphasizing the specific brands of Coalition members. Foremost among the non-Coalition responses was Braum’s, which was listed by 8.28 percent of the respondents.

Recognition of MIO Coalition Advertisements

Respondents were asked to provide information on any/all mediums where they had seen or heard any MIO advertisements. Table 3 shows the results for that question.

Television was the most common source of MIO advertisement exposure with about 41 percent of respondents having seen or heard televised MIO Coalition advertisements. The second most popular source of MIO Coalition advertisements was local grocery stores, according to just more than 30 percent of respondents. Newspaper inserts (26.21 percent) and newspaper articles/advertisements (26.90 percent) were also popular sources of MIO Coalition advertisements. Radio (11.72 percent) and billboards (8.97 percent) seem to be the least effective outlets for delivering the Coalition’s marketing messages.

Table 3: Shopper sources of MIO Coalition advertisements.

Where have you seen or heard any Made in Oklahoma Coalition advertisements?

	Number of Responses	Responses
Newspaper inserts	38	26.21%
Newspaper articles and/or advertisements	39	26.90%
Radio	17	11.72%
Local grocery store(s)	44	30.34%
Billboards	13	8.97%
Television	59	40.68%

Four respondents added "Social Media" as a place where they'd seen advertisements.

Respondent Demographics

Respondents were asked to provide information on their age, household income and household size. Age and household income answers were in ranges rather than exact numbers. Table 4 shows the distribution of ages provided by responding shoppers. Almost 40 percent of respondents were age 60 or older. A detailed examination of responses by store location indicated a higher percentage of "Older than 60" responses from the Stillwater store and a higher percentage of the "31-45" responses came from the Norman store.

Household incomes reported by shoppers were relatively well dispersed even though 11 percent of respondents did not provide income information (Table 5).

Comparing the two stores, the Stillwater store had a broader distribution of incomes with a higher share of the "More than \$100,000" responses. Incomes reported by the Norman store were more concentrated in the \$35,000-\$70,000 range, but both stores had relatively similar shares of responses in the categories representing incomes of \$35,000 or less.

Table 6 shows the frequencies of responses for household size. More than 40 percent of responding shoppers were part of a two-person household. The distributions of responses were similar for both the Stillwater and Norman stores. "One

Table 5: Household income information provided by shoppers.

What is your household income range?

	Number of Responses	Percent of Responses
Less than \$20,000	19	13.10%
\$20,000 to \$35,000	30	20.69%
\$35,001 to \$50,000	17	11.72%
\$50,001 to \$70,000	28	19.31%
\$70,001 to \$100,000	12	8.28%
More than \$100,000	23	15.86%
Did not respond	16	11.03%

Table 4: Age information provided by shoppers.

What is your current age?

	Number of Responses	Percent of Responses
Under 18	1	0.69%
10 to 30	23	15.86%
31 to 45	25	17.24%
46 to 60	39	26.90%
Older than 60	57	39.31%

person" responses were highly correlated with shopper ages of "18 to 30" and "Older than 60." Only 3.45 percent of respondents refused to provide information for this question.

Responding shoppers also provided information on their shopping habits, i.e. identifying the primary shopper for the household and preferred shopping days. As shown in Table 7, roughly two-thirds of the responding shoppers were the primary grocery shoppers for their respective households. Another 23 percent indicated that their spouse/significant other and themselves shared primary grocery shopping duties.

Table 8 shows the preferred grocery shopping days for respondents. More than one-third of the respondents had no designated or preferred grocery shopping day. Of those respondents who did have a preferred shopping day, Saturday and Sunday were the most common choices because shopping would not interfere with their work schedules.

It should be noted the survey process most likely resulted in responses skewed towards Sunday and Tuesday as preferred shopping days because the survey was conducted on one day per store. The survey was conducted in the Crest Foods store in Norman on a Sunday, resulting in a higher number of responses for Sunday as the shopper's normal shopping day. The survey at the Consumers IGA store in Stillwater occurred on a Tuesday, which generally has the store's highest weekday traffic because of a long-standing half-price banana promotion on Tuesdays.

Table 6: Household information for responding shoppers.

What is your current household size, including yourself?

	Number of Responses	Percent of Responses
One person	25	17.24%
Two people	60	41.38%
Three people	27	18.62%
Four people	13	8.97%
More than four people	15	10.34%
Did not respond	5	3.45%

Table 7: Primary shopper for respondents' households.

Who typically does the food shopping for your household?

	Number of Responses	Percent of Responses
You (survey respondent)	96	66.21%
Spouse/significant other	12	8.28%
Shared	34	23.45%
Other	3	2.07%

References

Stone, S.C., R. Holcomb, C. Willoughby, and A. Fischer. (2006). Consumer perceptions of the Made In Oklahoma Coalition: 2005. Report prepared for the MIO Coalition February 2015 board meeting, 2005 Made In Oklahoma Impact and Awareness Survey (MIOIAS).

Willoughby, C., R.B. Holcomb, J. Brooks, A. Graves, E. Early, and S. Ward. (2013) The Impact of 'Made In Oklahoma' Coalition Member Companies on Oklahoma's Economy: 2012. OSU Department of Agricultural Economics paper AE-13068, Stillwater, OK.

Table 8: Respondents' preferred grocery shopping days.

What day of the week does the primary food shopper normally shop for groceries?

	Number of Responses	Percent of Responses
Sunday	24	16.55%
Monday	6	4.24%
Tuesday	17	11.72%
Wednesday	9	6.21%
Thursday	5	3.45%
Friday	7	4.83%
Saturday	18	12.41%
Various/Multiple days	55	37.93%
Did not respond	4	2.76%

Responses for Sunday and Tuesday are probably skewed because the surveys took place on Sunday (Norman) and Tuesday (Stillwater).

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Issued in furtherance of Cooperative Extension work, acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture, Director of Oklahoma Cooperative Extension Service, Oklahoma State University, Stillwater, Oklahoma. This publication is printed and issued by Oklahoma State University as authorized by the Vice President, Dean, and Director of the Division of Agricultural Sciences and Natural Resources and has been prepared and distributed at a cost of 74 cents per copy. 0615 MG