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the **LEADER**

THE SHARED VALUES INITIATIVE

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As farmers and agricultural leaders, we are all too familiar with the old adage 'the only constant in life is change.' And while change is something that can be laborious and downright uncomfortable, it's something we must continue to stay ahead of in order to lead. That's why it's important for farmers, agricultural organizations, and agribusinesses to constantly monitor and understand consumer preferences and beliefs here in North Carolina and beyond. It was that leadership responsibility that drove North Carolina Farm Bureau to assemble a broad coalition of like-minded organizations and businesses who appreciate the role of agriculture in our state to discuss our challenges and opportunities as we seek to build a vision for the future of our industry in North Carolina.

We knew this was no small task that would require extensive research and discussion. And despite a few hiccups related to COVID shutdowns, we pushed forward with executing polling and focus groups, and followed up the research phase with a Communications Summit that took place on November 22-23, 2021 for our partners to come together to find our collective path forward. These "shared value" conversations are a proven, powerful tool of persuasion that we will all use in our communications plans for years to come. But first, we want to share with you a snapshot of where we are now. Here's a 30,000 foot view of a few focus group findings that we feel will be helpful for our supporters to read and digest.

The purpose of the Shared Values Initiative is to utilize North Carolina's vast agricultural organizations' ecosystem **to foster and build a stronger understanding and appreciation for North Carolina agriculture among non-ag North Carolina residents that builds trust**, thereby allowing farmers and livestock producers the social license to continue operating and prospering across the state.

How do we identify connections with consumers?

Consumer Knowledge

Knowledge of Ag **LOW**

Knowledge of agriculture and rural issues remains low and, generally speaking, focus group participants lack a deep and well-rounded understanding of these issues.

Furthermore, **few participants could identify a credible source of information on ag and rural issues.** Many participants noted that news coverage of farmers and agriculture tended to be negative and focused on natural disasters and food safety issues.

Consumer Trust

Trust in Farmers **HIGH**

Trust in farmers remains high, and **participants who know a farmer or have a connection to a farm are much more likely to have a positive opinion of agriculture.** Words and phrases used to describe farmers are overwhelmingly positive and convey respect for the work farmers do and the life they lead.

Farmers' markets and CSAs are a common intersection between farmers and consumers, building personal connections and providing an avenue for information sharing.



Focus groups

Reveal a deeper understanding of NC residents' concerns, identify messages that will resonate with them, and reveal opportunities to engage that help build trust between North Carolinians and traditional NC agriculture.

The Food System

Good or bad, farmers are top-of-mind when food supply is discussed.

- Participants expressed far less trust in the food system and supply chain than in farmers themselves.
- Consumers associated large, corporate, and conventional farming with food manufacturers who they believe are only in it for profit and are more willing to cut corners.
- Food supply chain is extremely important to participants.
- Respondents now believe the food supply chain is vulnerable, particularly in light of pandemic-era experiences.



What do consumers really care about?

Price, safety, and availability remain the most basic and important factors for consumers, and experiences during the pandemic have reinforced the importance of these factors.



How did participants rank their top concerns?

When participants were asked to choose their top concerns from a list, the focus is almost exclusively on food – particularly its availability, affordability, nutrition and safety. Interest was lowest in providing consumer choices like organic options and corporate ownership/involvement. **This underscores the discrepancy between the things participants are most concerned about and the things they say they are most concerned about.**

Issue/Concern	#1	#2	#3	Least	Weighted Score
Availability of food	11	5	7	2	48
Nutrition & safety of food	6	5	6	1	33
Affordability of food	4	8	4	1	31
Loss of farmland/green space	5	2	3	1	21
Worker health & safety	2	5	2	0	18
Sustainable industry practices	2	3	2	1	13
Availability of workers	4	1	1	4	11
Impact on the environment	1	3	1	0	10
Future of rural communities	1	2	4	1	10
Animal well-being	0	3	2	2	6
Corporate ownership/involvement	0	0	3	10	-7
Providing consumer choices like organic options	1	0	2	13	-8

All focus group participants were given a handout and asked to rank their top three concerns from the list above, as well as the issue they are least concerned about. To derive a weighted score, participants' first concern received 3 points, second 2 points, and third 1 point. A point was deducted for participants' least concern.

Are consumers aware of rural challenges?

STRENGTHS

01. Awareness

Most participants were at least somewhat aware of the challenges facing rural communities and residents, but like ag issues most only had a surface understanding. Additionally, **most were sympathetic but could offer almost no solutions.**

02. Infrastructure

There is a general understanding that rural areas are under-invested from an infrastructure standpoint, especially in terms of broadband, healthcare, and education. They were aware that it is increasingly more difficult to recruit teachers and health care workers to rural areas.

03. Nuisances

Participants are ready to defend farmers when new residents, who move into developments adjacent to farms, complain about smells or other nuisances, **noting that those who came to the problem are the ones who must adjust.**

WEAKNESSES

01. Investment

Participants are not ready to divert money away from urban and suburban areas to address the needs of rural communities. This is due in part to a distrust in the government's ability to solve problems, and in part to a recognition that urban areas have a need for public investment as well.

02. Interactions

The urban/rural divide in North Carolina was recognized as a concern, and **lack of positive exposure to rural North Carolina could cause negative interactions** down the road. There is a danger that the detachment between rural and urban residents will grow without renewed connections and interest in one another.

03. Future on the farm

Participants note that the future is not on the farm or in rural North Carolina, but rather in urban areas, leading to graying of rural and farm communities. There is an admiration of farming and the rural way of life, but a sense that neither farming nor rural communities offer a dynamic and fulfilling quality of life.