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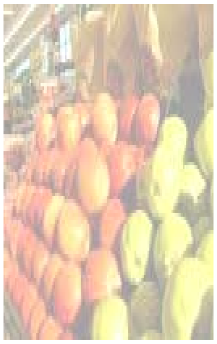
SEFA Southeast Food Access *Working Group*

Food Preferences in San Francisco's Southeast Sector

A survey conducted by the Southeast Food Access Working Group

Survey Results and Analysis

October 2007



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EXECUTIVE SUMMARY

The ***Southeast Sector Food Preferences Survey*** reached well over 600 residents, primarily from the Bayview Hunters Point neighborhood, between June and September of 2007. Online and print surveys in English, Spanish, and Chinese were designed to illuminate residents' preferences with regard to food and food retailers. The survey was also designed to gauge interest in attracting new options to the Southeast Sector: an area of San Francisco that is considered underserved and home to significant health disparities that could be diminished with more equal access to healthy food.

The survey process was collaborative and community-based, led by the Quesada Gardens Initiative (a grassroots organization located in the Bayview) and the San Francisco Department of Public Health in concert with other grassroots groups from Bayview Hunters Point. The goal was to facilitate *residents asking residents* for their opinions, whenever possible, while lending significant City resources to the process. Surveys were administered online and at grocery stores, food pantries and markets, community meetings, public housing, libraries, and door-to door. **The results published here are based on 562 qualifying surveys.**

Limitations: The survey was administered to a convenience sample, and the results are representative only of those who participated. While it is difficult to generalize beyond the responses of those who participated, the survey reached a diverse BVHP population through food pantries, public housing residents, and internet users participating in BVHP –focused listservs. Using mixed methods (focus groups, internet survey, paper survey) also helped bolster findings, particularly when findings across the strategies can be triangulated and ultimately strengthen one another. In many instances, our findings were consistent across the methods, lending greater credibility and stability to the survey findings. We have included **respondent comments** sparingly when the statistical results indicate an important issue. There are **minor rounding errors** in the percentages, but they do not substantively affect the results.

The *Southeast Sector Food Preferences Survey* emerged from a **Shape Up SF Coalition** sub-group (**Southeast Food Access working group or SEFA**) dedicated to improving healthy foods in the Bayview Hunters Point and Visitacion Valley neighborhoods. SEFA is a coalition of San Francisco City & County agencies and community based organizations such as home delivery programs, corner store conversion projects, food banks and pantries, school and community food garden projects, health care and community development initiatives.

The *Southeast Sector Food Preferences Survey* indicates that there is a ready market for new food retail options in the Bayview Hunters Point neighborhood. Market size is potentially vast[1], and pent-up demand may be significant.[2] The passion inherent in survey comments and the sample size (N), which is large relative to most surveys in the Southeast Sector, indicate that the issue of food access is important to area residents.

> ***A vast majority, 94%, of Southeast Sector residents surveyed say they would actively support new food options in their neighborhoods.***

No current retailer meets consumer demand. The survey makes it clear that area residents routinely set aside convenience and transportation issues to pursue preferred foods and shopping experiences outside their neighborhood. Retail sales leakage for full service grocers is $38 million, and may be growing rapidly.[3]

> ***Over half (58%) of residents surveyed say that they frequently buy their groceries at Safeway (just one of the options outside the Southeast Sector).***

The first food retailer to improve an existing supermarket or to create a new one that blends a first rate shopping experience with a variety of quality offerings could reap tremendous rewards. Neighborhoods like the Bayview Hunters Point are likely to support top notch supermarkets – including those that provide a selection of Latino/Hispanic and Asian ethnic foods, organic and natural foods, and high-quality produce, meats, and dairy products.[4]

> ***Eighty one percent (81%) of respondents rate "freshness" as the most important factor when choosing a place to shop for food, far more than those who prioritize affordability, availability of prepared foods or foods grown locally, organically, and by well-treated workers.***

> ***Nearly one quarter (23%) of respondents who do not shop at the area's most active supermarket, FoodsCo, say it is due to the store's atmosphere.***

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[1] Social Compact puts the Bayview Hunters Point population at 50,000, home ownership rate at 49%, average household income at $74,000, and aggregate neighborhood net worth at $1.2 billion.

[2] The lack of acceptable food options is not new. Other research finding a high demand for new options include: a demographic study as part of the Redevelopment Agency's *Revitalization Concept Plan* from November 2000 which found that "the community has strongly expressed their desire and need for more full-service grocery stores…," a Youth Envision/LEJ survey in 2002 which found that 53% of Bayview Hunters Point residents buy most or all of their food at places other than neighborhood supermarkets, and a 2005 study by Dr. Nadine Burke that substantiates the difficulty of finding quality food in the neighborhood.

[3] Social Compact figures.

[4] Given the high percentage of WIC participants (23%) in the survey sample (N), the statistical margin of quality over affordability may be conservative.

For any market to succeed in the Southeast Sector, it must offer variety. Understandably, large format stores known for a wide variety of offerings were favored. However, survey respondents indicated a willingness to embrace smaller, independent stores under the right conditions (e.g., a safe location) if those stores offer a high-quality, varied selection and a good atmosphere.

> ***Respondents almost equally prefer cooperative full service (58%) or chain / large format stores (53%), with preference for independent stores rated at 35%.***
>
> ***Excluding produce, high quality meat and fish are ranked as "most important" by three quarters (75%) of survey respondents who answered the question.***

Southeast Sector consumers are open to a range of location options for new markets. Currently, consumers regularly travel out of the neighborhood to find the foods and shopping experiences that they want. Third Street, however, is widely perceived as unsafe; and the number one reason why respondents did not frequent SuperSave (the major Third Street food retailer) was "location."

> ***Nearly half (45%) of survey respondents say that the best way to attract healthful food to the Southeast Sector was to have a couple smaller businesses or full-service markets in different locations.***

Southeast Sector consumers share the values of the Bay Area when it comes to food and food retail options. Residents seem to care about organics, cultural sensitivity, and workers.

> ***When asked to rank what qualities they considered important, 58% of survey respondents say that a co-op market (worker- or community-owned) is "most preferred;" and 53% said that foods free of pesticides and chemicals grown by local farmers who treat farm workers fairly is "most important."***

Food Preferences in San Francisco's Southeast Sector Survey Results

Demographics

Race/Ethnicity: Responses were broken down into the racial/ethnic categories used by the United States Census Bureau: White (Hispanic or non-Hispanic), African American, American Indian and Alaskan Native, Asian, Native Hawaiian or other Pacific Islander, and Multiracial. Of those who disclosed, the majority were African American (47.5%). White makes up the second largest group (19%), and Asian the third largest (15%). About one-tenth (11%) of respondents are Latino, and 5% are multiracial. A small proportion (2%) stated that they are Pacific Islander, and .5% of the respondents are Native American.

Language: Most (84%) responded to the survey in English, 10% responded in Chinese, and 6% responded in Spanish.

Residency: Over two thirds (68%) of respondents, live in Bayview Hunters Point and 9% in Visitacion Valley. Of those who marked "other" for this category, most live elsewhere in the Southeast Sector: Dogpatch, Chinatown, Potrero Hill, Portola, Mission, India Basin, and Alemany areas.

1. Please check where you live:

	Response Percent	Response Count
Bayview	50.5%	283
Hunters Point	17.8%	100
Visitacion Valley	8.7%	49
Other:	23.0%	129
answered question		561
skipped question		1

Employment: Most respondents work in Bayview Hunters Point. Of those who marked "other" for this category, most work in the Bernal Heights, SOMA, Dogpatch, Potrero Hill, and Mission Hill areas. Several respondents are disabled, unemployed, or worked from home.

3. If you work in the Southeast part of SF, please check where:

	Response Percent	Response Count
Bayview	22.8%	97
Hunters Point	14.1%	60
Visitacion Valley	5.9%	25
Retired	21.4%	91
Other:	35.8%	152
answered question		425
skipped question		137

Age: The survey respondents are primarily adults. Only 2% are under the age of 18. About one tenth (11%) are between 18 and 24, and 20% are between 25 and 35. The majority, 22%, are between 36 and 45 years of age. Seventeen percent (17%) of respondents were aged between 46 and 55, and 13% were 56 to 65 years old. 15% were over the age of 65. A focus group held to develop the survey instrument included primarily senior residents, but the results are not included here.

Public Assistance: About 23% of respondents are food stamp or WIC participants.

Shopping Habits

Who you shop for? About half of the respondents (49%), shop for food for two to three people. An additional 22% shop for four to five people.

4. How many people do you shop for?

	Response Percent	Response Count
1	16.3%	89
2-3	48.8%	267
4-5	22.1%	121
6-7	8.4%	46
8+	4.4%	24
answered question		547
skipped question		15

Nearly one third (30%) shop for two and three children, and 20% shop for one, as indicated in the following table:

5. How many children do you shop for?

	Response Percent	Response Count
0	37.2%	174
1	20.9%	98
2-3	29.7%	139
4-5	7.5%	35
6-7	3.0%	14
8+	1.7%	8
answered question		468
skipped question		94

How often do you shop? The largest group of survey respondents, 50%, makes two to three trips to the grocery store each week to shop for food. Over 27% go to the store once per week, and nearly 17% shop for food every other week.

9. How often do you shop for food?

	Response Percent	Response Count
1x week	27.1%	149
2-3x week	49.8%	274
Every other week	16.9%	93
Other:	6.2%	34
answered question		550
skipped question		12

How do you get to the store? Nearly 62% stated they have access to a car. Respondents mentioned the bus or MUNI 37% of the time, and 17% walk to the store.

10. How do you get to the store?

	Response Percent	Response Count
Car	61.9%	340
Bus/Muni	37.2%	204
Walk	16.8%	92
Bike	2.0%	11
Taxi	3.1%	17
Get a ride	13.1%	72
Other:	2.2%	12
answered question		549
skipped question		13

Where do you shop? Area shoppers buy their groceries at a very wide variety of places.

11. Where do you shop for food?

	Response Percent	Response Count
Alemany Farmers Market	20.6%	114
BVHP Farmers Market	8.0%	44
Corner Store (please name below)	13.9%	77
Foods Co	62.2%	344
Front Door Farms (home delivery)	1.6%	9
Good Life	7.4%	41
Rainbow	18.6%	103
Safeway	57.5%	318
Smart & Final	29.3%	162
Somethin Fresh (home delivery)	1.1%	6
Super Save	28.4%	157
Walgreens	30.2%	167
Other:	33.1%	183
	answered question	553
	skipped question	9

Overall Satisfaction with Available Options

- **SuperSave** Location and the quality/freshness of food were the main reasons cited by survey respondents for not shopping at SuperSave, while other major barriers to shopping there included safety and the store's atmosphere.

12. If you don't shop at Super Save, why not?

	Response Percent	Response Count
Quality/Freshness of food	27.2%	106
Atmosphere	21.5%	84
Prices	21.3%	83
Location	31.8%	124
Safety	19.0%	74
Other:	33.9%	132
	answered question	390
	skipped question	172

What positive changes could SuperSave make to attract customers? The survey answers suggest a need for quality, price and selection, atmosphere and location changes. One fifth (21%) of respondents cited the need for improvements in the freshness of the produce, meat, and fish; and 17% cited high prices. Sixteen percent (16%) of respondents indicated that a better atmosphere would increase the likelihood they would shop at SuperSave, and 5% focused on the need for improved safety -- specifically mentioning the need for renovation, improved cleanliness, and a reduction in both loiterers and nearby liquor stores.

Other survey respondents (14%) said a change in location, and 13% said a greater variety of food items to choose from would attract them. Respondents particularly wanted a larger selection of Asian and Latino ethnic foods, higher end products, local produce, organic options, and vitamins.

Only six percent did not know how to improve on the store, or felt that nothing would persuade them to shop at SuperSave.

- **FoodsCo** The majority of the respondents who do not shop at FoodsCo cited poor quality, selection, and lack of food freshness as reasons. Several respondents requested more natural, healthy, and organic options, and less processed and canned foods. The second most cited reasons for not shopping at FoodsCo were atmosphere (primarily cleanliness) and customer service (primarily long lines).

14. If you don't shop at Foods Co, why not?

	Response Percent	Response Count
Quality/Freshness of food	41.5%	113
Atmosphere	23.2%	63
Prices	15.1%	41
Location	25.7%	70
Safety	7.4%	20
Other:	34.2%	93
answered question		272
skipped question		290

Those who did not shop at FoodsCo were asked what changes in the store would entice them to do their grocery shopping there. The most common answer to this question was an improvement in quality. One quarter (25%) of respondents noted that fresher foods and better quality meats, produce, baked goods and dairy products were needed.

The second most common answer to the question of what changes might attract more patronage was that greater variety was necessary. One fifth (21%) of respondents stated the selection at FoodsCo was poor. Specifically, the need for Asian ethnic foods, upscale and specialty brands, environmentally friendly products, vegetarian foods, bottled water, seasonal and local produce, books and magazines, prepared foods, dry goods and packaged foods, and healthier foods – such as less processed and more natural and organic options.

Respondents mentioned high prices 16% of the time, and advised FoodsCo to offer more specials, sales, and items available by food stamps.

Fourteen percent (14%) of respondents said that an improved atmosphere would entice them to shop at FoodsCo, with cleanliness, customer service, lighting, management, and general store appearance and layout as particular problem areas. A small number, 4% cited safety as an issue.

A small minority of respondents suggested a new location or an altogether different store.

Barriers to Shopping on Third Street

Safety was paramount in respondents' minds when deciding whether to shop on Third Street. One quarter (25%) of respondents cited it as the reason they did not frequent shops there, and often mentioned the pervasiveness of loiterers, liquor stores, drug and alcohol use, and shootings. Residents described the shops on Third Street "depressing," "unappealing," "unsafe," and "threatening."

Nearly a quarter (22%) of respondents do not shop on Third Street because of its *location*. One fifth (21%) indicated that they do not visit Third Street shops for groceries due to lack of variety in stores with specific mention of the need for organic options, ethnic foods (particularly Chinese items), and a quality produce or grocery store. Many respondents felt that Third Street offered only liquor and corner stores. One wrote: "Most stores have an unhealthy atmosphere and they only carry junk food."

Sixteen percent (16%) of respondents found the *quality* of food available on Third Street, including the freshness of produce and types of packaged foods sold, was too poor to warrant shopping there. A smaller proportion (8%) thought that the prices were too high relative to the quality of food on sale. One respondent wrote: "There's no quality fresh organic products, aside from the farmers' market which is on a workday, so most people can't shop there."

What fruits and vegetables do you eat? In an area with demographic diversity, a wide range of produce found favor in the survey -- with bananas as the overall favorite.

17. What fruits and vegetables do you eat or serve most often?

	Response Percent	Response Count
Apples	70.2%	380
Bananas	80.4%	435
Berries	41.6%	225
Cherries	45.5%	246
Grapes	64.0%	346
Kiwi	27.0%	146
Mangos	41.0%	222
Melons	50.8%	275
Oranges	63.0%	341
Peaches	57.9%	313
Pears	43.6%	236
Pineapple	40.3%	218
Plums	40.7%	220
Avocado	47.0%	254
Bok Choy	29.8%	161
Broccoli	76.5%	414
Cabbage	56.2%	304
Carrots	62.1%	336
Cauliflower	35.3%	191
Corn	64.9%	351
Greens	47.9%	259
Green beans	57.3%	310
Lettuce	71.0%	384
Spinach	56.9%	308
Squash	33.5%	181
Tomatoes	29.0%	157
Peas	39.4%	213
Potatoes	72.3%	391
Other (please specify)	14.2%	77
	answered question	541
	skipped question	21

Are your preferred foods available? About 33% of survey respondents stated that there are produce items that they cannot buy in their neighborhood; they include Asian and Hispanic/Latino ethnic foods - such as Chinese greens, kumquats, soy products, ginger, nopales, dried chiles, and yucca. Numerous respondents said that the most difficult category of foods to locate were relatively expensive, such as berries, asparagus, fresh herbs, and tropical fruits. Finally, respondents also indicated that they could neither find their preferred produce at nor acceptable quality.

Consumer Preferences

What are the most important factors when you shop for food? When asked to rate quality, price, and certain "values" associated with food, respondents chose *freshness* by a wide margin – 81% of respondents rated it number 1. The next most significant preferences were *affordability* and the availability of *foods free of chemical and pesticides,* and foods *locally grown* where *farmers are treated fairly*.

19. Please rank 1-4, (1= most important; 4= least important) How important is it to you that the food provided by stores:

	1 = Most Important	2 = Important	3 = Somewhat Important	4 = Least Important	Rating Average	Response Count
a) Is fresh	80.6% (407)	11.9% (60)	3.2% (16)	4.4% (22)	1.31	505
b) Is affordable	53.1% (258)	24.5% (119)	12.1% (59)	10.3% (50)	1.80	486
c) Includes healthy, prepared foods	42.1% (182)	18.3% (79)	16.7% (72)	22.9% (99)	2.20	432
d) Is free of chemicals/pesticides & grown by local farmers who treat farm workers fairly	52.8% (239)	17.7% (80)	15.7% (71)	13.9% (63)	1.91	453
					Additional Comments:	18
					answered question	530
					skipped question	32

What is your preferred store format? Respondents almost equally preferred cooperative full service (58%) or chain store (53%) large format stores, with independent stores preferred at 35%. *Full service markets, regardless of ownership structure, seem to be heavily favored.*

20. There are different types of stores that sell groceries, which type of market would you prefer? Please rank 1-3, (1= most preferred; 3= least preferred)

	1 = Most Preferred	2 = Preferred	3 = Least Preferred	Rating Average	Response Count
a) a Cooperative Full Service Market (worker or community owned, like Rainbow)	57.6% (245)	25.9% (110)	16.5% (70)	1.59	425
b) a Supermarket Chain store (like Safeway)	53.2% (241)	25.2% (114)	21.6% (98)	1.68	453
c) an independent grocery store (like Good Life or Super Save)	34.7% (136)	36.2% (142)	29.1% (114)	1.94	392
				Comments:	65
				answered question	505
				skipped question	57

What store services do you prefer? The survey focused on preferences with regard to healthy food options, especially fruit and vegetables. When produce was removed from the equation, respondents rated meat/fish by a wide margin as products they most wanted to find offered at stores (75%). However, many respondents also wanted bakery items (42%) and dry goods (34%). Over one third (35%) prioritized participation in food stamps/WIC programs.

21. Other than produce, what services are important to you in a full service market or several smaller businesses? Please rank 1-5, (1= most important; 5= least important)

	1 = Most Important	2 = Very Important	3 = Important	4 = Somewhat Important	5 = Least Important	Rating Average	Response Count
a) Bakery	42.4% (199)	19.0% (89)	23.2% (109)	9.2% (43)	6.2% (29)	2.18	469
b) Meat/Fish	74.5% (368)	12.8% (63)	6.3% (31)	2.2% (11)	4.3% (21)	1.49	494
c) Dry Goods	33.6% (145)	28.8% (124)	22.7% (98)	9.3% (40)	5.6% (24)	2.24	431
d) Flowers	15.4% (60)	5.9% (23)	13.6% (53)	25.6% (100)	39.5% (154)	3.68	390
e) Food stamp/WIC	34.5% (135)	7.7% (30)	10.2% (40)	9.5% (37)	38.1% (149)	3.09	391
						Other:	30
						answered question	525
						skipped question	37

Overall Support for New and Improved Options

What is the best way to ensure the availability of fresh, healthy food? While a related survey question indicated a general preference for a large format store (or stores), another question connected to food quality suggests that respondents believe that larger stores are more likely to provide the desired quality. Removing this variable might have closed what is already a narrow margin: 55% of respondents preferred a large grocery store, and 45% preferred a couple of smaller establishments in different locations. *(please see chart on following page.)*

22. What would be the best way to make sure there is fresh, healthy food in the BVHP or VV?

	Response Percent	Response Count
a) one large grocery store	54.9%	271
b) a couple of smaller businesses and/or full service grocery stores placed in different locations	45.1%	223
Comments:		69
answered question		494
skipped question		68

Individual comments suggest that residents would embrace multiple responses to the problems associated with access to food. Respondents wrote repeatedly that an influx of a variety of different businesses and shops (not just food retailers) is needed. Many wanted small and large businesses to commingle and promote interaction between people.

One respondent wrote: "I envision a day when there is a Safeway and a Trader Joe's out here, along with Third Street being lined with produce markets, bakeries, flower shops, ice cream stores, coffee shops, deli, pizza, cafes, video stores, and the like. If someone was to say, *Impossible!* I would question their commitment to creating a healthier, safer, and happier neighborhood. In the meantime, I would settle for a safe place to just stop off and buy what I need for dinner."

Would you actively support new or improved food options?

A vast majority (94%) of respondents said that they would actively support and shop at new food markets in the Southeast Sector. This and other survey questions indicate that major overhauls to existing food retailers could also achieve the support of residents. 78% of the respondents who answered the question stated that they wanted to receive updates regarding the efforts of SEFA to bring healthy food to San Francisco's Southeast Sector.

The *Southeast Sector Food Preferences Survey* spotlights a significant untapped market in San Francisco, and offers an actionable formula for capitalizing on it: top quality + wide variety + first-rate atmosphere = success. Existing food retailers in the area can improve profits, and new businesses can find a large and willing market by offering what residents in the Southeast sector have asked for.

Acknowledgements

The Southeast Food Access Working Group (SEFA) is a group of committed residents, community based organizations and city agencies that have joined forces to improve access to healthy food in the Southeast sector of the City, particularly the Bayview Hunters Point. While bringing a full service, high quality market to the neighborhood became a major focus for the group, SEFA remains committed to implementing a range of strategies that will improve the health and wellness of Southeast Sector residents.

The group is led by **Mark Ghaly**, MD, MPH, Director of the Southeast Health Center and **Michael Janis**, General Manager, Wholesale Produce Market. Both have contributed their wisdom and leadership to this effort, carefully guiding a process that is fruitful and effective. SEFA is staffed by two public health professionals with a respected commitment to social justice, addressing health disparities and creating sustainable, healthy food systems: **Susana Hennessey-Lavery,** MPH, and **Christina Goette Carpenter**, MPH, both Prevention Section staff in the Department of Public Health. Susana played a lead role in the implementation and writing of this report, her contributions are greatly appreciated.

This survey is the product of the hard work of many groups and individuals that comprise SEFA. **Jeffrey Betcher**, Co-Founder and Organizer of the Quesada Garden Initiative, led the implementation of the survey in the field and developed this report and associated materials, all pro bono. We are indebted to him for his commitment and vision.

Many community partners also made a concerted effort to reach out to the BVHP community to gather their responses. Among them are **Ann Berry**, Network for Elders; **Katie Helwig**, SF Food Bank; **Jacob Moody**, Bayview Hunters Point Foundation for Community Improvement; **Virgie Newman**, Reach out for the Rainbow Afterschool program; **Sudeep Rao**, Literacy for Environmental Justice; and **Beverly Taylor**, Network for Elders and St. Paul's Tabernacle; **Karen Pierce** with HEAP; **Laura Brainin-Rodriguez**, Feeling Good - DPH; Staff at **MOCD** and **Communities of Opportunity** sites; **Pat Coleman Clinic**; and **Family Connections**.

We are grateful to numerous interns without whom we would still be at square one: **Frances Wong**, DPH intern and MPH candidate at San Jose State University; **Elizabeth Berger**, DPH intern and MPH candidate at UCLA; **Roza Tammer**, Mayor's Office intern; **Craig Ng**, Mayor's Office intern.

We received technical assistance in the development of the survey from **Amy Cohen**, MOEWD; **Heather Wootan**, Public Health Institute; **Hannah Laurison**, Public Health Institute; and staff at LISC.

We are also grateful for support from staff at the Mayor's Office, **Jenny Louie** and **Katy Tang**, and Supervisor Sophie Maxwell's Office, **Jon Lau**.

The Mayor's Challenge:
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Visit www.shapeupsf.org for more information
or contact Christina Goette Carpenter or Susana Hennessey Lavery at 415-581-2400.