

SEPTEMBER 2020

2020 Tillamook County Food Producer Assessment

Creating a North Coast Food Hub:

Measuring local supply and exploring strategies to increase efficiencies in food distribution



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IMAGE BY
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2020 Tillamook County Food Producer Assessment

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Introductions and Acknowledgements

Oregon's North Coast is home to dozens of small, independent food businesses including farmers, ranchers, fishers, and value-added producers. This bountiful region is well known for its diverse variety of foods that are harvested, grown, or produced throughout the year, including beef, pork, lamb, dairy products, fish and shellfish, honey, vegetables, value-added culinary products, and craft beverages. Our region's food producers are creative and resilient, taking pride in the quality and range of their offerings. Many producers, especially in response to COVID, are exploring new ways to collaborate with one another to get more local food into local markets, and to develop methods that further utilize and capture more value for the bounty our region produces.

In August and September 2020, during one of the busiest times of year on the North Coast, 38 local food producers engaged in the survey and interview process that informed this report. We would like to extend our deep appreciation to our food community for sharing their thoughts, experiences, and time to help us understand more about the local food system's challenges, bottlenecks, and opportunities.

We would also like to express our gratitude to the North Coast Food Systems Collaborative for supporting this meaningful work over the past several years. The Collaborative is made up of local and regional Economic Development Districts, Port Districts, Destination Management Organizations, non-profit organizations, and for-profit food, farm, and fisheries businesses, all working together to create a more vibrant, resilient, and equitable food system on the North Coast of Oregon. Currently focused on increasing the capacity and market reach of our small agriculture and seafood producers, the Collaborative is leading the way in forging new cooperative models and partnerships in an effort to bring more local foods to Oregon tables and beyond.



Executive Summary

Background

The conversation about what a food hub on the North Coast might look like has been ongoing within the local food system community and the Collaborative for many years. A food hub, as defined by USDA, is “a centrally located facility with a business management structure facilitating the aggregation, storage, processing, distribution, and/or marketing of locally/regionally produced food products.” One of the primary goals of many food hubs is to give small- and medium-sized farmers access to larger or additional markets.

This assessment follows up the “North Coast Oregon Food Hub Feasibility Study” completed in March 2019 by Food Roots, which identified the following:

- Markets reached by local producers
- Delivery methods used by local producers
- Opportunities for collaboration to develop more efficient local delivery systems

The 2019 assessment indicated that time spent by North Coast food producers on “self-delivery and marketing of products restricts the supply of locally produced foods,” and that “a centralized hub to aggregate local products, provide information of product availability to buyers, and [provide] logistical support to producers such as storage, product marketing, and access to buyers was identified as a need by assessment stakeholders.”

The recommendations for action in that report included:

- Development of a business plan and strategy for establishing a centralized distribution hub
- Training opportunities for small food businesses to scale up their operations
- Networking opportunities to connect buyers and sellers of North Coast products

The 2020 Tillamook County Producer Assessment is an updated assessment that addresses the Covid-19 pandemic and its impacts on our regional food system, including local food supply, current markets utilized, and current distribution systems. Reevaluation of the local producer community has proven especially important in light of the global pandemic that has impacted this sector, revealing opportunities for immediate investments in our local food system which can help create and retain jobs, aid producers in scaling up operations, and increase accessibility to locally produced food.

Findings and Conclusions

Overall, the case for investing in our local food community is strong. The 38 local businesses that participated in this assessment provide 75 local rural jobs across Tillamook and Clatsop Counties, and the potential for increasing jobs in this field appears significant: 63% of these businesses report that scaling up their operations would require additional labor.

However, there are several issues that can affect the overall supply and accessibility of local food. On the North Coast, food production and sales are interconnected, and in many cases are governed by natural rhythms such as growing seasons, fish migrations, or animal life cycles, and are also influenced by producers' ability to access land and fishing rights and processing services. Our region, like many areas along the West Coast, has experienced a decline in food system infrastructure over the past few decades, such as certified meat and seafood processing facilities. These factors can diminish markets by limiting the amount of product grown or harvested in our region, but also reveal opportunities for creative and collaborative solutions.

Producers participating in this survey expressed needs that include (in order of highest priority):

- Assistance making sales or reaching new buyers
- Distribution of products
- Access to cold storage
- Access to commercial/certified kitchen or processing space for value-added products
- Marketing assistance
- Specialized consulting to develop food safety plans (including HACCP) or navigate other regulatory challenges

Recommendations for action

Since 2019, a local food hub concept has gained traction in the region; the vision has evolved from a single centralized distribution hub into a network of smaller hubs that support the specific and shared needs of each sector of the larger system. An ideal network would provide processing and aggregation points from Astoria to Lincoln City, as well as a regional distribution system to connect these local "feeder hubs" to other existing hubs, services, and customers in the greater Portland area.

In the near term, Food Roots recommends investment in this network, through securement of specialized property assets, equipment, and technical assistance for the local food community, as well as investment in local capacity to support food production and distribution. Food Roots is currently working with the North Coast Food Systems Collaborative on several federal and local grant applications to support this work.

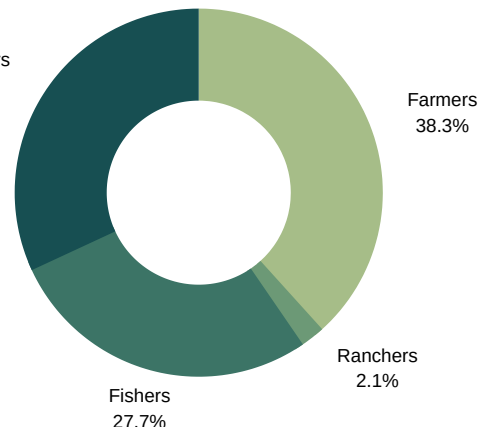
Current Production

Demographics

The 38 survey participants self-identified along the following sector demographics:

- 18 farmers
- 1 rancher
- 13 fishers
- 15 value-added producers

Value Added Producers
31.9%



Of the 18 farmers, 7 of these individuals also identified as the following:

- 5 meat/cheese producers
- 2 aquaculture/seafood producers

Of the 15 value-added producers, 9 of these individuals also identified as one or more producer category in addition to their base category:

- 6 fishers
- 3 farmers
- 1 rancher

Of the 32 participants who chose to complete the demographics section:

- 90% identified as white and between the ages of 25 and 64
- 17 identified as male
- 16 identified as female

Producers' businesses are mainly located in Tillamook County; a few outliers purchase raw products from Tillamook County but operate in neighboring Lincoln County, Willamette Valley, or the Portland metro area.

Product Diversity

The lands and waters of the North Coast are rich and abundant, making it possible for food producers to contribute a wide variety of products to our local food system year-round, including fruits, herbs, vegetables, eggs, beef, pork, lamb, hazelnuts, bison, cheese, fish, and shellfish (including crab, clams and oysters).

Of the 38 producers surveyed, twelve create value-added products and eight specialize in culinary offerings such as baked goods or prepared foods, sauces, and stocks.

Crops, wild-harvested species, and livestock are typically highly seasonal items, although some producers have invested in ways to extend their growing or selling seasons by use of specialized equipment. For instance, five vegetable farmers indicated that they are able to grow some crops year-round by utilizing hoop houses or other infrastructure, and several meat and seafood producers have their products flash-frozen or smoked to extend shelf life and enable sales throughout the year. These activities often carry a high cost in initial equipment purchases, or a recurring processing cost.

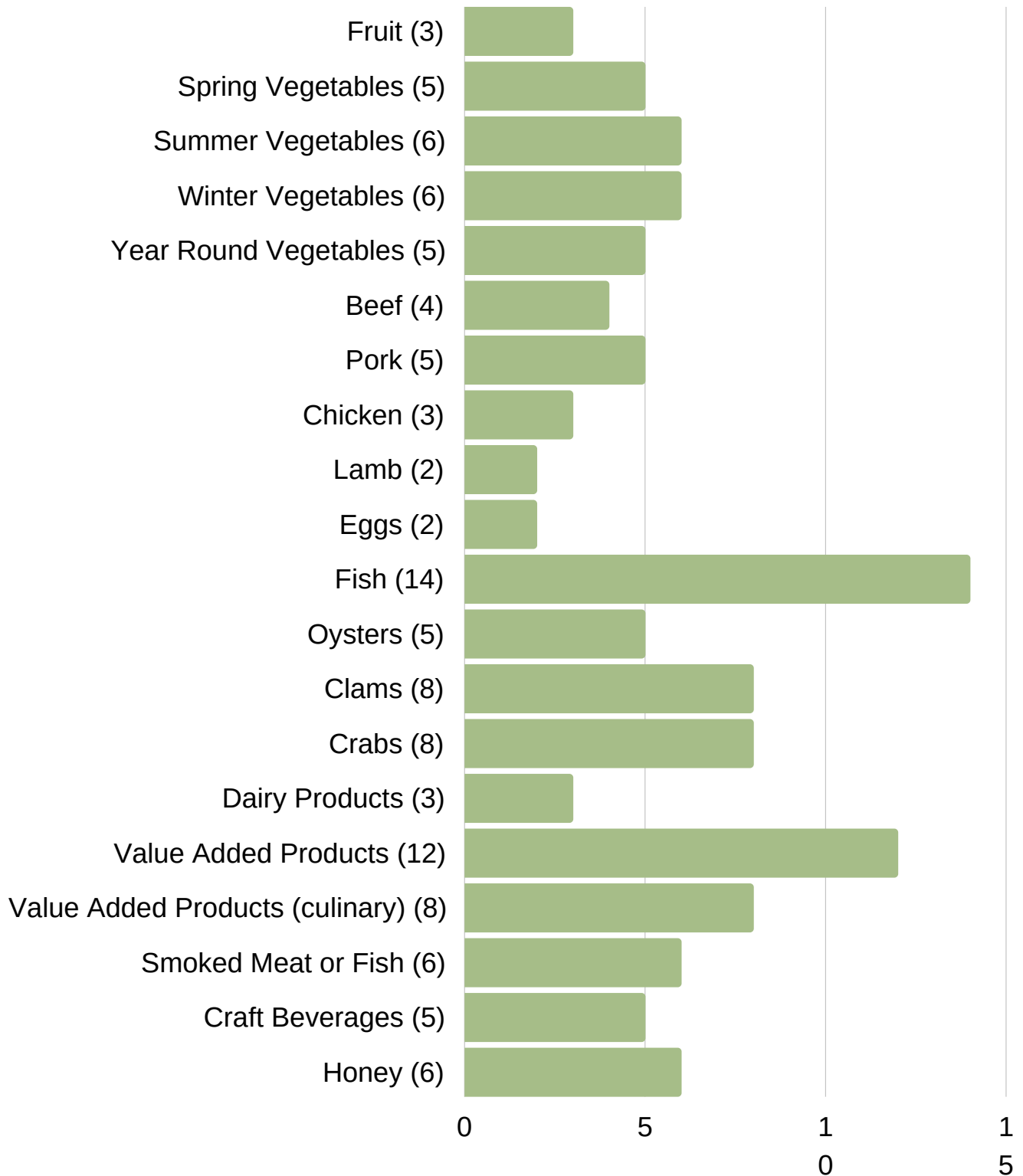


NORTH COAST OF OREGON

*An abundance of locally
caught, raised and
produced foods*



Current product diversity represented by the North Coast producers we surveyed is displayed by category in the following chart. The numbers indicate how many producers grow, harvest, or create items in each particular food category:



Yearly Production Cycles and Product Availability

North Coast food sales and availability are limited by production cycles and seasons. Seasons include environmental patterns in which weather, water, daylight, and tide cycles affect plants and animals. Local food sales are also impacted by societal patterns throughout the year, including holiday spending and tourism and travel trends. For example, multiple producers attributed higher sales volumes during the summer to increased tourist traffic and visitation at the coast that time of year. Although the height of sales in our region does occur from April to October, 82% of businesses surveyed reported that their products are available and sold all 12 months of the year to a wide range of customers, including individual consumers, wholesale, and restaurant accounts.

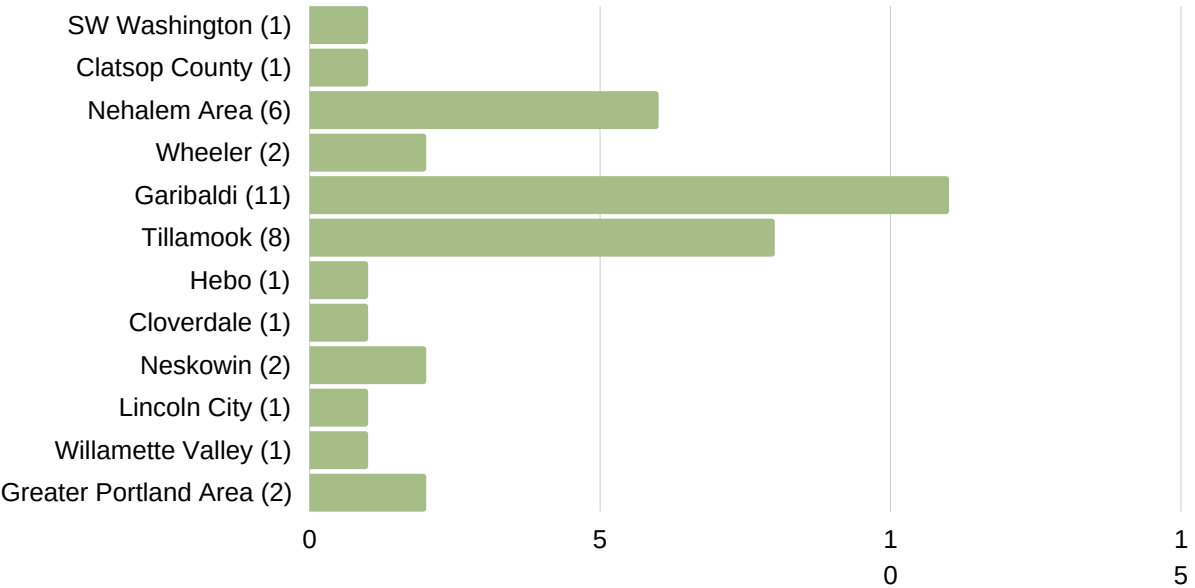
We found that product availability is also limited by the high costs of expansion. Some producers cannot increase their yield until they have invested in specialized equipment, secured more land, or secured greater access to the species they harvest.

For example, **to expand production:**

- **Five** farmers need to **buy or lease more land**
- **Seven** producers need an **operating line of credit to purchase/aggregate product** from colleagues to increase product sales in their existing markets
- **Eighteen** producers need to **buy specialized equipment** to process or create their own value-added products
- **Four** fishers need to **buy or lease a boat**
- **Seven** fishers need to **buy or lease another fishing permit**

Production Locations

Survey respondents indicated their operations are located in the following areas:



Existing Markets

Customer Diversity

Currently, the majority of local producers sell to a variety of customer types, including individuals, wholesale buyers and distributors, retail and grocery outlets, and restaurants. The volume moving through each channel varies greatly depending on the business model, but over 80% of the businesses surveyed report that they sell at least some product directly to individuals.

Several businesses stated that this year they are selling to different markets in response to the Covid-19 pandemic. For example, restaurants were forced to close for several weeks at the beginning of summer 2020, and many of these businesses have not reopened due to financial impacts of the initial closures. Many producers and distributors who historically sell to restaurants were forced to abruptly pivot their business models in order to maintain cash flow during this time, and began selling as much product as possible direct-to-consumer (DTC). For example, one vegetable producer increased their CSA program from 60 families to over 90 families, while another farmers started a CSA program for the first time. One rancher reported that their sales matrix has shifted from 33% direct sales in 2019 to 70% in 2020, and restaurant sales have declined from 33% to 15% of their total sales.

There does appear to be a barrier in supplying local food to institutions, as only 3 businesses report selling to hotels or schools, and no businesses currently sell to hospitals. Although institutional buyers could provide a healthy new market for local foods, survey responses indicate that producers are wary of any decreases they may have to make in product pricing to sell to these customers. However, with information gathered in our 2019 assessment, institutional buyers of local food products rely on distributors who can aggregate supply in larger quantities, making the food hub concept attractive to these buyers, which could provide sellers with improved interest in producing for wholesale buyers who can commit to regular purchasing.

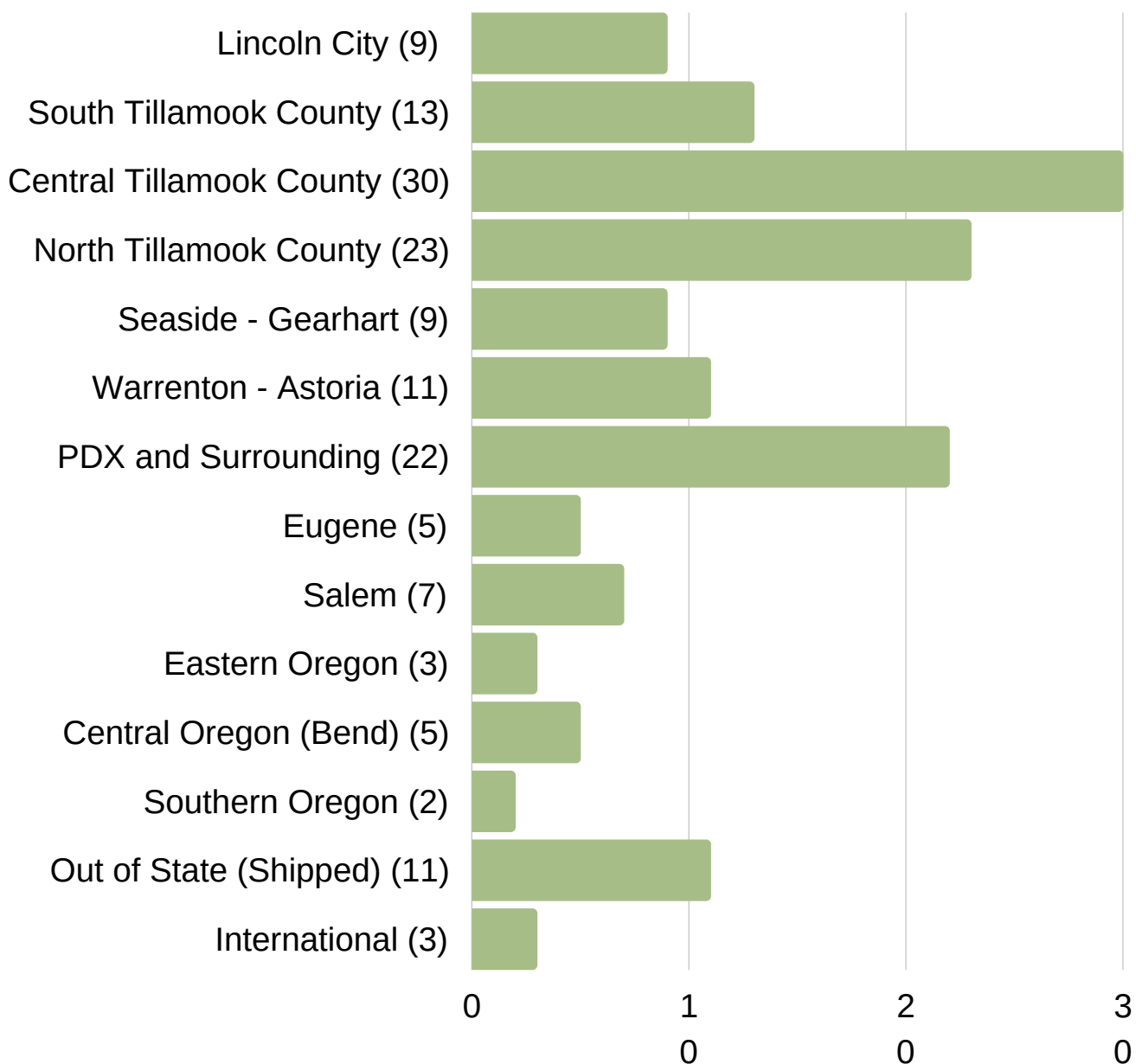
While some producers mentioned that they choose business relationships based solely on financial yield, many others indicated they prefer developing relationships with individuals, small retailers and restaurant buyers because of the deeper connection and value these buyers find in high-quality, local products.

Customer Locations

Producers surveyed reported that 50% of their local product is sold in Tillamook County. The remainder is sold from Lincoln County to Astoria and Long Beach, Washington, and to customers in the Portland metro and Willamette Valley region, including Salem and Eugene. Some producers also sell their products out of state, and even internationally.

Many producers commented that a large percentage of the food sold in Tillamook County is sold to visitors from out of the area rather than locals, which is not surprising since tourism is a major economic driver on the North Coast. In 2018 alone, visitor spending contributed over \$815 million in "new money" to Tillamook and Clatsop County economies, with \$327.4 million of this spent on food service and in food stores (Dean Runyan "Oregon Travel Impacts", March 2019).

The number of businesses selling to customers in each of the regions mentioned above are displayed in the chart below:



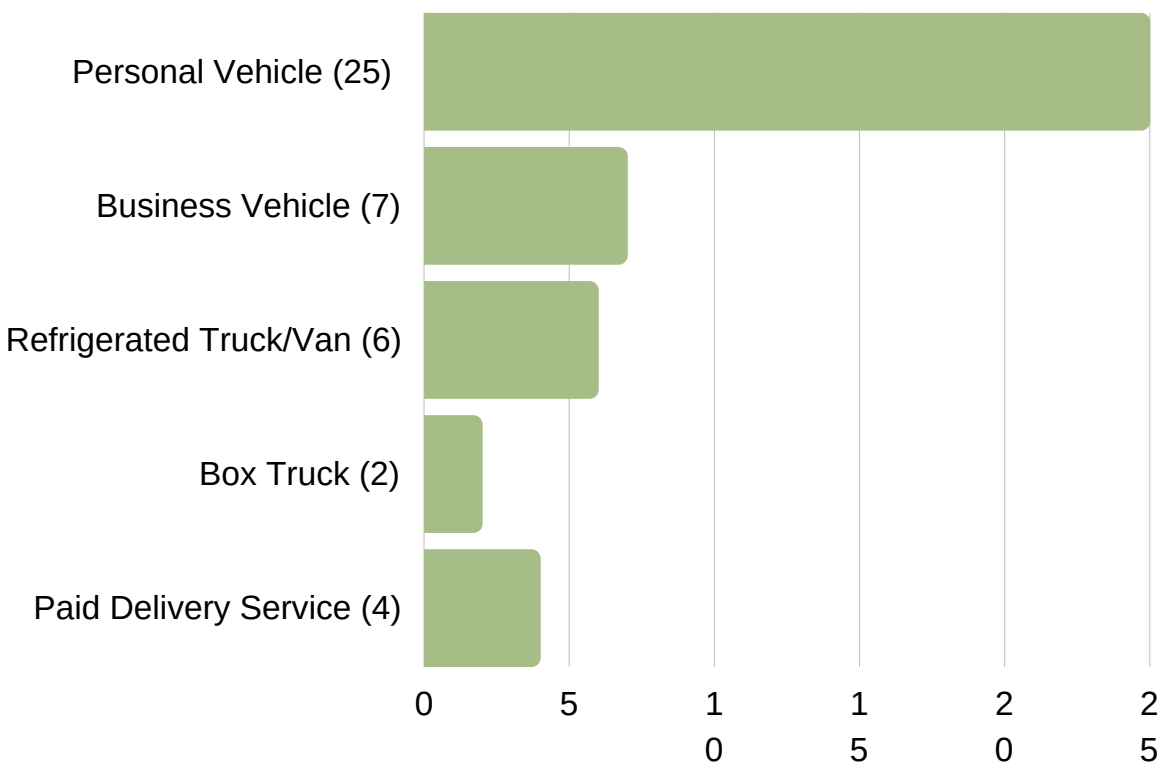
Existing Distribution Systems

Delivery and Distribution

Producers on the North Coast use a variety of methods to deliver products. The most common ways producers get products to market is to handle business deliveries internally, or for customers to come to them. Very few businesses use a paid delivery or shipping service. 80% of producers make deliveries themselves, while 28% pay an employee; 15% trade services with a colleague to deliver products on their behalf.

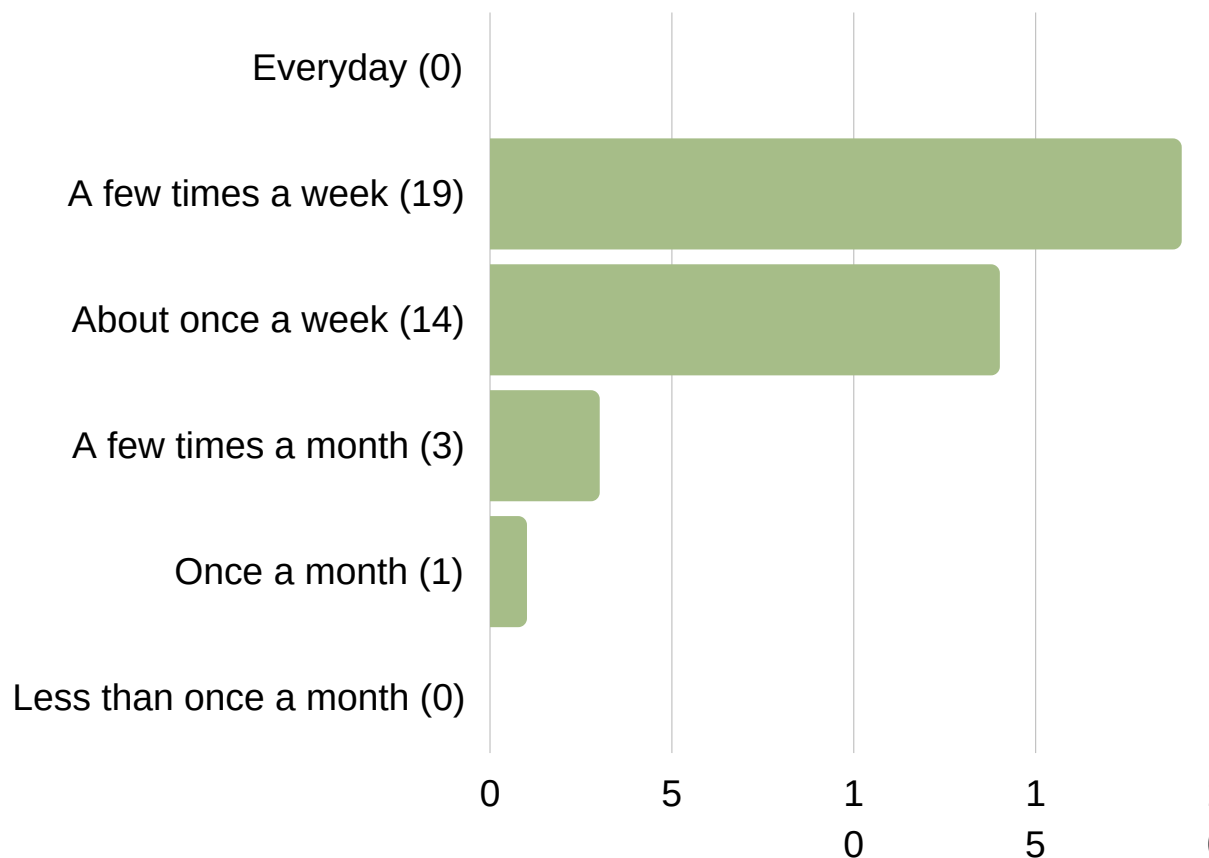
Whether delivering themselves or hiring an employee to drive, the vast majority of producers are using their personally-owned vehicles to deliver products. Refrigerated delivery vans can cost around \$35,000 - \$45,000 used and roughly \$60,000 - \$75,000 new; because of the high cost, few producers can afford or have access to this type of vehicle at this time, although it was mentioned by several businesses that a refrigerated vehicle was on their “wish list.”

The chart below indicates the manner in which products are delivered to local markets:



87% of businesses surveyed deliver products at least once a week, with 19 of these delivering multiple times a week. The other businesses deliver much less frequently; some of these producers noted that this is because their customers pick up products from the producer directly, or because they pay a service or colleague to deliver for them.

The frequency of product delivery among surveyed producers is displayed in the chart below:



On average, this group of producers are spending 123 to 181 hours cumulatively **each week** delivering products or arranging deliveries. This number of hours equates to roughly 3.8 FTE.

Many producers commented that they often combine deliveries of product in with other business they need to do in town. However, many also observed that they drive the same delivery routes as their colleagues, often to the same customers on the same days, indicating that this may be an area in which greater efficiencies can be achieved.

Conclusions and Recommendations

"Would a local food hub or delivery system help your business?"

In answer to this question, two-thirds of stakeholders interviewed (67%) stated that a regional food hub and delivery system would indeed help their business, and when asked if they could imagine increasing their production volume to supply expanded wholesale markets, over 20 producers said yes. **Of these, twelve were 100% certain they could scale immediately**, while eight expressed hesitation due to the fact that they lack the capacity or bandwidth to reach or develop relationships with new customers.

While this is a promising indicator to support development of a local hub, the majority of the remaining producers interviewed said they were "not sure," indicating that they would need more information on the range of services a food hub would provide. Five participants shared that they have already sufficiently invested in their own company infrastructure and staffing to handle larger wholesale accounts, with three of these stating they were not interested in the services a food hub could offer.

Making a business case for local food system support

Survey results confirm that many local producers expect and are prepared to pay 20-30% of retail prices for someone else to handle storage, marketing, sales, and delivery. All of the local producers surveyed utilize a combination of markets to move products, and many have shown resilience during the recent pandemic in shifting sales to different channels to maintain cash flow.

In 2018, Food Roots expanded our FarmTable farmers market program into a year-round brick-and-mortar storefront which serves as a local food aggregation hub and features products from almost 40 regional producers. FarmTable collects a 20% commission on most product sales, which helps offset the costs of running the store, and our knowledge of operational costs and revenue is growing quickly, especially since implementing an online marketplace as part of our COVID-19 pivot. Since February 2020, sales have tripled and we have added over a dozen new staple food products, including frozen seafood, to our marketplace offerings. These sales include purchases from SNAP customers, and in an effort to explore offering delivery to our food insecure community members, we recently partnered with North Coast colleagues to create a business model pro forma for a collaborative delivery system that would serve producers, wholesale customers, and individuals in Northwest Oregon and connect existing hubs in Portland, Astoria, and Tillamook.

As research on local food production has evolved, so has our understanding of the unique needs and bottlenecks of the sectors and individual producers within our regional system. Food Roots still recommends investment in a regional food hub and related infrastructure, but now recognizes that one centralized hub may not be the best way to serve our local food community. By linking hubs which are dispersed throughout the region via a collaborative framework and local delivery system, we can achieve greater efficiencies for multiple users. This will require a significant investment in local capacity for coordination and system development to support food production, marketing, and distribution.

Appendices

A1. North Coast Food System Collaborative Overview

A2. North Coast Community Food Assessments & Reports Overview

A3. 2020 Tillamook County Food Hub Producer Survey: Introduction and Questions



A1. North Coast Food System Collaborative Overview



**Columbia Pacific
Economic
Development
District**

September 24, 2020

Oregon North Coast Food System Collaborative Overview

The North Coast Food System Collaborative is a multi-partner network of economic development, small agriculture and seafood producers, non-profit food system support organizations, tourism, food trail and farmers market organizations, small business development centers, local ports, and food value chain technical advisors. Since 2015, this network of strategic food system partners has worked to increase the capacity and market reach of our small agriculture and seafood producers.

Our work has been through a planned phased approach to supporting our local food system. In the first two phases, value chain assessments, food hub feasibility studies, and other research and planning activities have contributed to the development of producers/harvester training opportunities, supported market development and education programs, and supported the need for development of some necessary infrastructure. Our current Phase III focuses on supporting activities for Implementation and Expansion: Regional Coordination, Procurement Coordination and Marketing/Resource Acquisition (including acquisition and piloting of additional food system infrastructure).

The Collaborative's goal is to institutionalize the long-term resiliency and sustainability of the North Coast's locally-produced food system. To achieve true sustainability and resiliency, our Oregon North Coast Food System development efforts plan to accomplish the following three measurable objectives:

- Increase access to locally produced food by all populations and sectors of the region
- Increase the resiliency and independence of food sources and systems within the North Coast region
- Improve the livelihoods of the region's small agriculture and seafood producers

Founding members of the Collaborative include the following businesses, individuals and organizations:

- Columbia Pacific Economic Development District (Col-Pac)
- Rural Development Initiatives (RDI)
- Port of Garibaldi
- Tillamook Coast Visitors Association (dba Visit Tillamook Coast; VTC)
- Oregon Coast Visitors Association (OCVA)
- Tillamook Small Business Development Center (SBDC)
- Tillamook Economic Development Council (EDC)
- Food Roots (501c3)
- North Coast Food Web (501c3)
- Ecotrust (501c3)
- North Coast Industries, LLC (dba Blue Siren Shellfish; Kristen Penner)
- Nehalem River Ranch (dba Nehalem Valley Provisions; Jared Gardner)

Please contact me with any questions you may have about these regional efforts.

Sincerely,

Ayreann Colombo
Executive Director
Columbia-Pacific EDD
503.961.5915

A2. North Coast Community Food Assessments & Reports Overview

The following reports capture data from our local food producer community across land and sea based sectors. The information collected is current and relevant, with several of the reports including this one conducted post-Covid or the year prior. Food Roots is currently working with the NCFSC to update and leverage this data to secure funding that will support food system coordination and pilot infrastructure investment programs.

- **North Coast Food Vision Survey (NCFSC, 2020)**

- This survey was drafted to inform a grant proposal and deployed as Covid-19 took hold, to North Coast producers, local government officials, and NGO directors to gauge interest in participating in a local food movement to institutionalize a vision and new direction for our North Coast food system and economy. Over 50 local community leaders completed this survey. A full report from this survey is not yet complete due to lack of capacity, however, the data is very rich as most questions were open-ended, and overall, local food access is top of mind and a priority issue for many community members.

- **North Coast Online Marketplace Report (Ecotrust, 2020)**

- At the onset of the Covid-19 pandemic, the Oregon Coast Visitors Association contracted with Ecotrust to produce a rapid-response industry survey and report to inform emergency investments in online local food marketplaces to support North Coast producers and retail stores in light of social distancing measures, including the non-profit run Tillamook FarmTable and Clatsop Market Day hubs.

- **North Coast Oregon Food Hub Assessment (Food Roots, 2019)**

- The 2019 assessment is the predecessor to this current report and was funded by a Business Oregon Grant received by VTC in 2018. These two reports are designed to work in tandem to inform Food Hub Network planning efforts on the North Coast. The 2019 Assessment included responses from both buyers and sellers of local foods.

- **Garibaldi Seafood Value Chain Initiative**

- **Garibaldi Seafood Value Chain Assessment (Ecotrust, 2019)**

- **Garibaldi Seafood Infrastructure Assessment (Ecotrust, 2019)**

- **Tillamook County Fisheries Economic Impact Report (Ecotrust, 2019)**

- This initiative, led by the Port of Garibaldi, Rural Development Initiatives, and Col-Pac focused on increasing the wealth and well-being of small commercial fishing boat owners, crew members, fish processors, and retailers in the Garibaldi-Tillamook area.
- The reports layer different outreach efforts and summarize community opportunities; the full 50-page Seafood Value Chain Assessment documents critical challenges and opportunities present for Garibaldi's small-scale seafood sector, which includes boat owners, crew, processors, and retailers. In the course of conducting this assessment, the steering committee identified the following priorities which are guiding current investments:
 - Improve seafood industry infrastructure in Garibaldi and Tillamook County
 - Monitor and enhance local fisheries access and ownership
 - Connect fishermen and seafood businesses to business support and enhance access to capital
 - Expand connections to new buyers and markets
 - Promote regional fisheries tourism and increase local purchasing of seafood
 - Brand local and regionally caught seafood
 - Fish waste solutions

A3. 2020 Tillamook County Food Hub Producer Survey: Introduction and Questions

Introduction: The purpose of this survey is to understand the supply of local food available to meet wholesale demand, and to gauge our local producers' abilities to expand into new markets. We also want to identify what additional services would be of value to local producers' operations. This will help us cost out creation or support for these kinds of services within our community. Thank you for your participation!

Context: On the North Oregon Coast, we have regional buyers such as restaurants, hospitals, and grocers who want to source food locally. They are used to paying wholesale and commodity level prices through Sysco, FSA, etc. Many of these wholesale buyers are familiar with the quality of products from our region and they value the marketing power of carrying locally sourced products.

While they may be willing to pay a fraction more for locally sourced products, restaurants/distributors/grocers cannot buy from you at the same retail price they charge their customers. They also often prioritize convenient and consistently available products. Think of it this way, when a retailer sells something for \$10 they must account for their costs of rent, utilities, labor, storage, marketing, sales, delivery, and invoicing, etc, while trying to make a profit. Producers can expect to get 20-40% less than retail prices by selling to wholesale buyers - but they often save in terms of storage, marketing, sales, delivery and invoicing costs.

In previous interviews, several local producers reported success in maintaining a mix of wholesale and retail customers. Although they had started up their businesses by focusing on direct-to-consumer (DTC) sales, they later realized that developing a few wholesale accounts could help provide a more reliable and consistent base of sales (even at a lower price). They were having to ramp up production anyway to meet DTC demand, but the retail market was also requiring more time and cost in delivery, marketing and relationship management. Once they had established loyal wholesale customers, they then had more time to return focus to DTC marketing for a portion of their sales, which often provides higher margins.

As we consider what a food hub on the North Coast would look like, or what services it might provide, we appreciate your insights! Thinking of what the end consumer pays (and knowing there are many steps, costs, and infrastructure required for getting products to market) what would you be willing to pay for someone else handling essential items such as distribution, invoicing, or marketing? Are there particular steps you want to avoid? Are there particular ones you want to handle for yourself and/or others? Please elaborate in your answers below.

A3. 2020 Tillamook County Food Hub Producer Survey: Introduction and Questions, continued

Survey Questions:

- Q1: Please enter your contact information (your answers will be kept anonymous).
- Q2: What type of producer are you (check all that apply)?
- Q3: What is your age? (all answers will be kept anonymous)
- Q4: What is your race/ethnicity? (all answers will be kept anonymous)
- Q5: What is your gender? (all answers will be kept anonymous)
- Q6: What town is your operation closest to?
- Q7: Which months of the year are your products sold? (We understand this may differ than your harvest or production season. If you sell all year please check all the boxes). FOLLOW UP: Are there some months where product sales are dramatically less or more? Please tell us more about that here: (Open Ended).
- Q8: What products do you sell? (What is sold - check all that apply)
- Q9: We are trying to get a sense of how much volume and what kinds of products might be moved through a food hub facility annually or seasonally to determine space requirements and employee costs. Roughly how many total pounds or units of product do you sell a year? (Break down into main categories if you would like, such as by category listed above)
- Q10: How many employees do you have?
- Q11: To whom do you sell your products? (check all that apply)
- Q12: In regards to the question above, what are your top three markets and roughly what percentage of total sales flow through each channel? (Example: "wholesale - 50%, consignment - 30%, individuals - 20%".....or if you only sell through one channel, you might put "wholesale - 100%")
- Q13: Where are your customers located? (check all that apply)
- Q14: How are the products delivered – or picked up? (check all that apply)
- Q15: During your selling season, how many days of the week do you deliver product to your buyers?
- Q16: In what manner is your product delivered to market – car, truck, refrigerated truck? (check all that apply)
- Q17: If you use a delivery vehicle, do you own or lease this vehicle?
- Q18: If you pay for delivery service, how are you charged and how much does it cost?
- Q19: What is the cost of the delivery service described above? Is there a minimum cost associated with pick up or delivery of your products? If so what is it?
- Q20: If you self-deliver, do you charge your customer a delivery fee?
- Q21: How many hours does it take you or your company to deliver (actual time loading, driving, and unloading product) or arrange pick up of products each week (coordinating routes, etc)?
- Q22: Would a food hub/food delivery system help your business? (For instance, a food hub could potentially provide one or more services such as product storage, marketing, sales, delivery, invoicing, etc)
- Q23: In follow-up to question above, which of the following services would help your business?
- Q24: If you don't already, could you imagine increasing your volume of sales by selling into wholesale markets (or expanded wholesale markets)?
- Q25: Which types of wholesale markets are the most interesting to you?
- Q26: Are there costs or investments you would need to take on to scale your business or to "jump" to a new or different level?
- Q27: What would you be willing to pay to save time by someone else handling product storage, marketing, sales, delivery, invoicing, etc?
- Q28: Do you have any other thoughts about the local food system or your business challenges you would like to share?
- Q29: Would you be willing to have a brief 1:1 follow-up conversation if we have any other questions or need clarification on any of your comments? (We anticipate this would take 15-30 min and we could work with your schedule for a phone call or meet you somewhere that is convenient!) We are able to provide a \$50 visa gift card to producers who complete this survey and are willing to engage in a potential 1:1 interview. Please indicate below if you might be available for this follow-up. Thank you again!

End of survey.