



HUDSON VALLEY CSA COALITION

Russell RESEARCH

HUDSON VALLEY CSA RESEARCH

April 2019

RESEARCH BACKGROUND



Objective

Evaluate awareness, consideration & engagement with Hudson Valley Community Supported Agriculture

- Evaluate grocery and food shopping behavior
- Measure non-member awareness, familiarity, and incoming perceptions of CSAs
- Evaluate the current CSA experience among members
- Determine CSA concept impact on membership consideration and perceptions



Audience

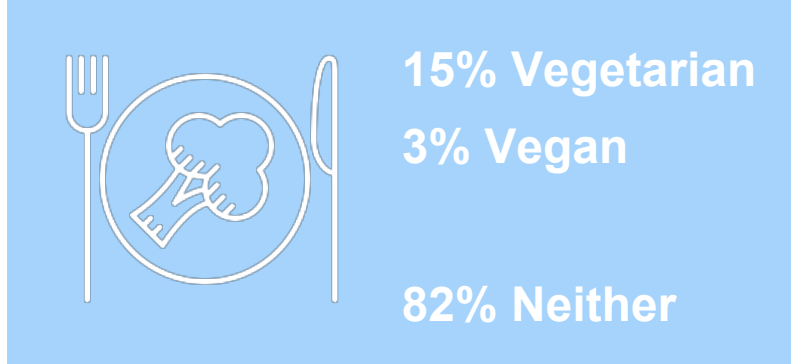
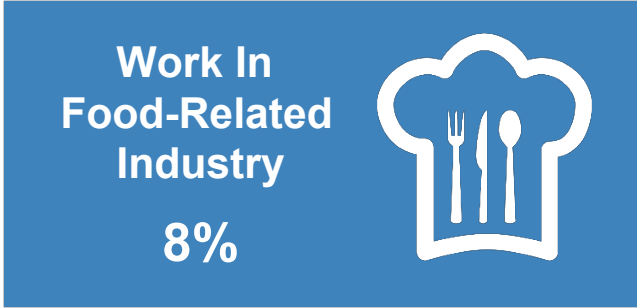
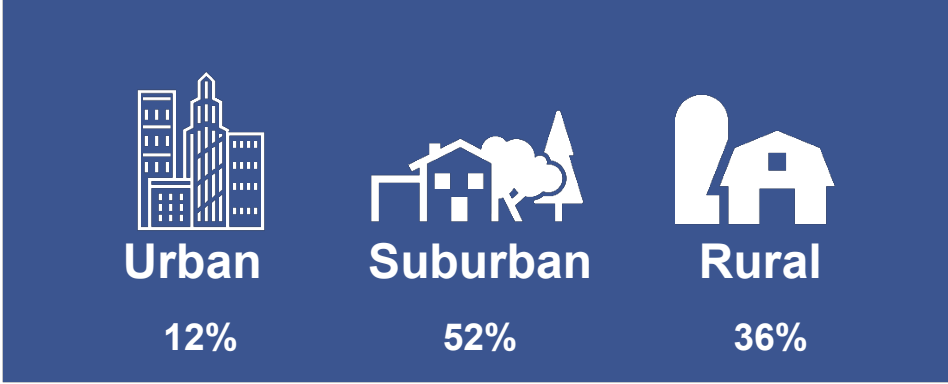
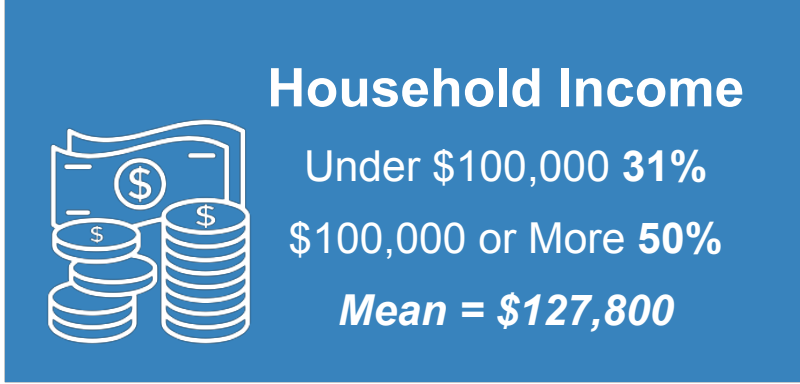
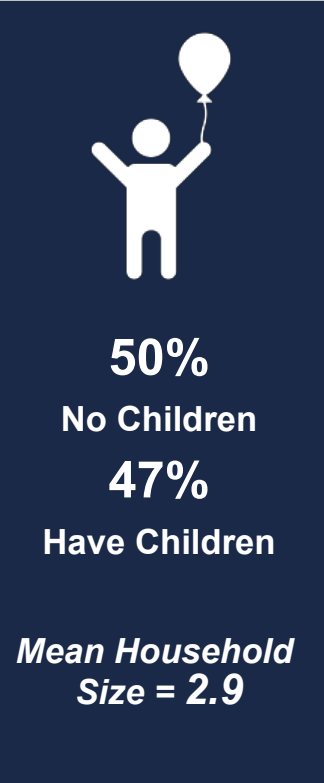
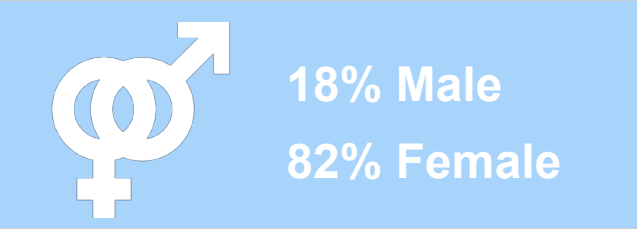
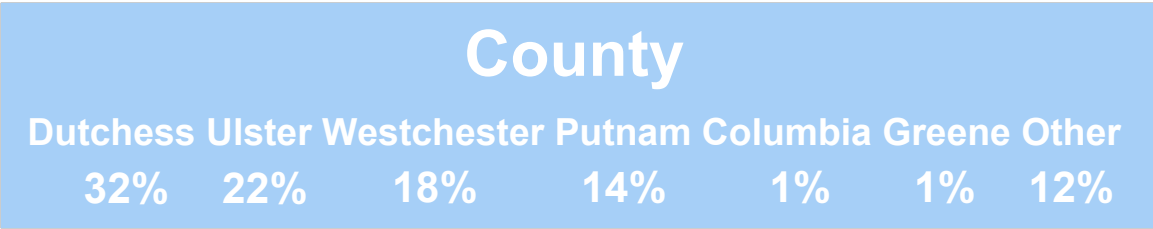
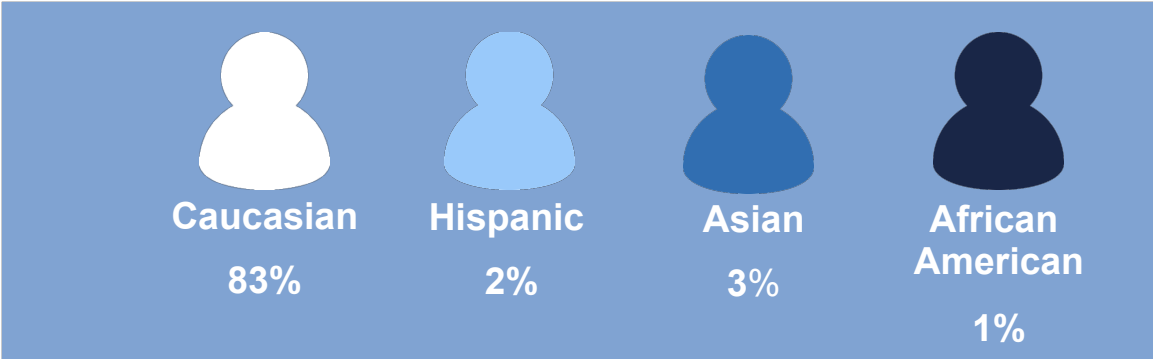
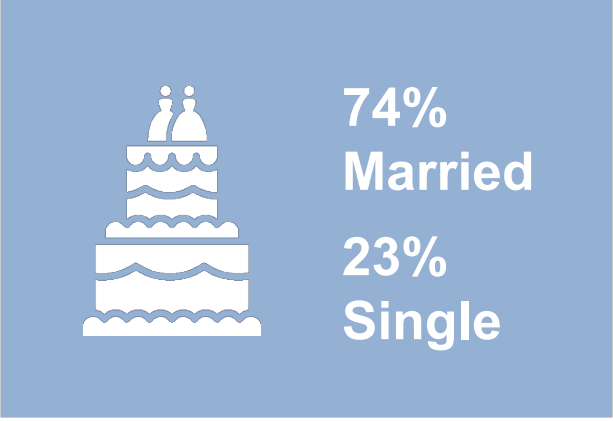
- 304 Non-Members (December 2017)
 - 67% Female / 33% Male, 25-65, Live in Hudson Valley, 30K+ Income, Not Unemployed, Category Shoppers, Non-CSA Users
- 300 Members (March-September 2018)
 - 18+, Live in Hudson Valley, Currently participate in 1+ CSA programs



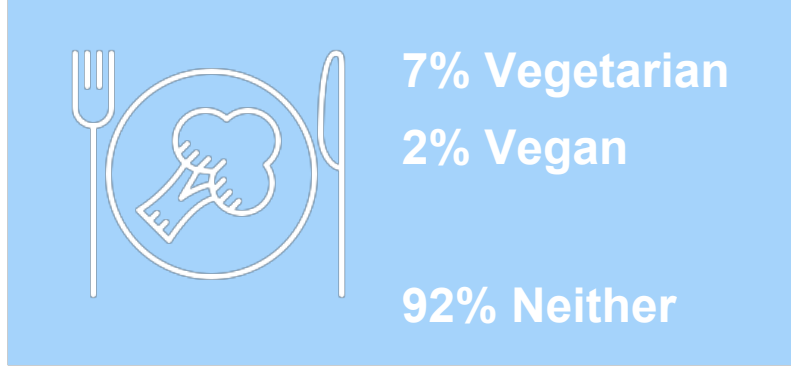
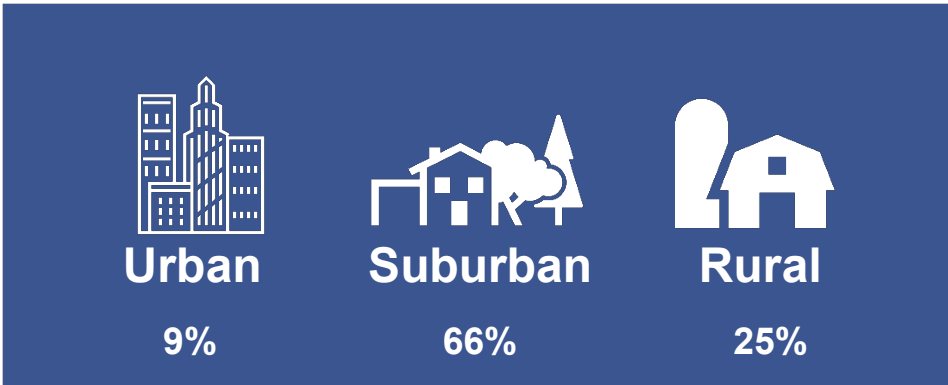
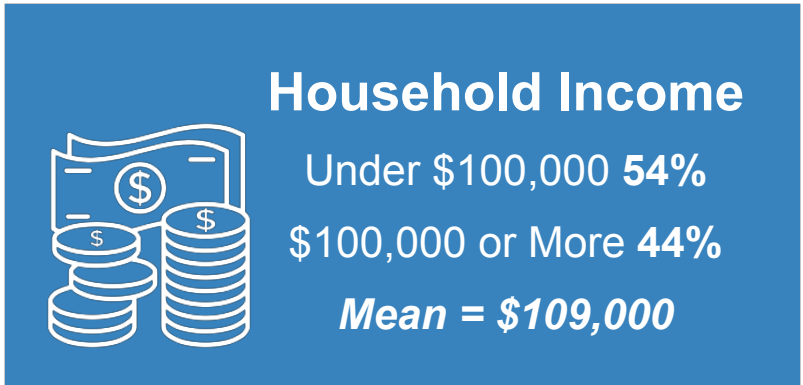
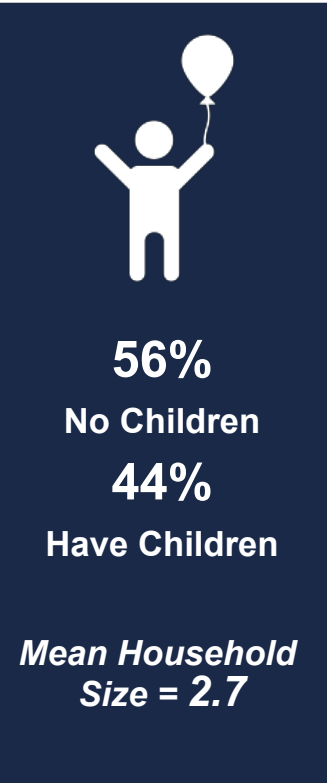
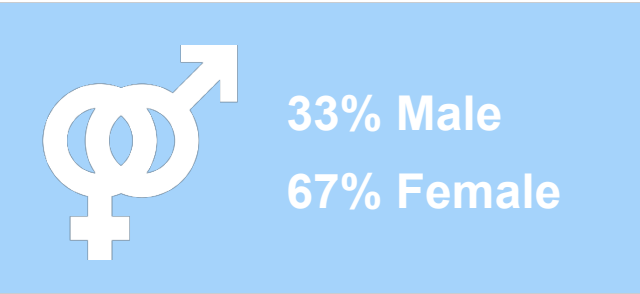
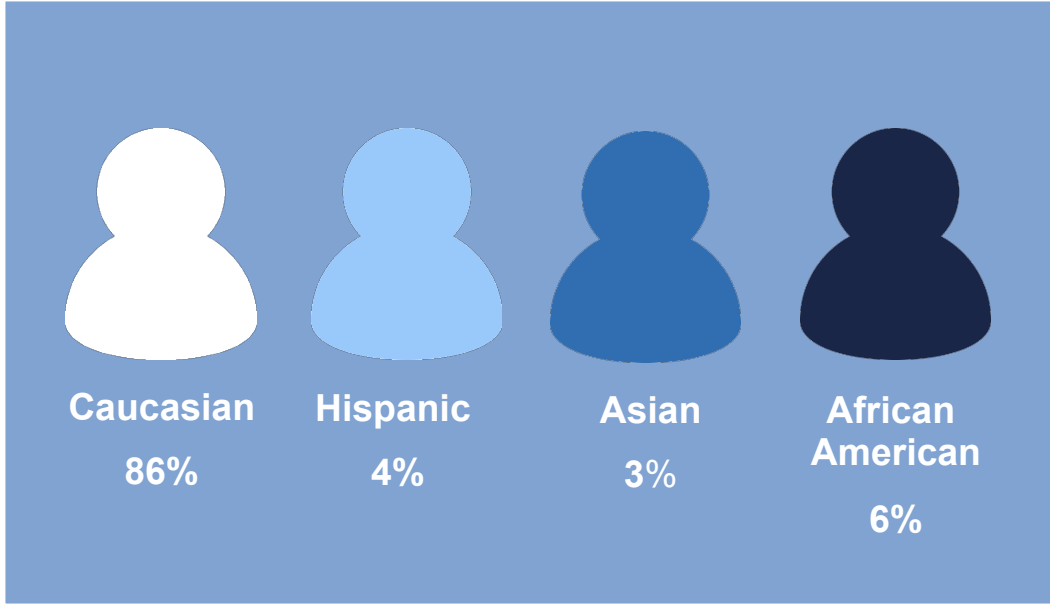
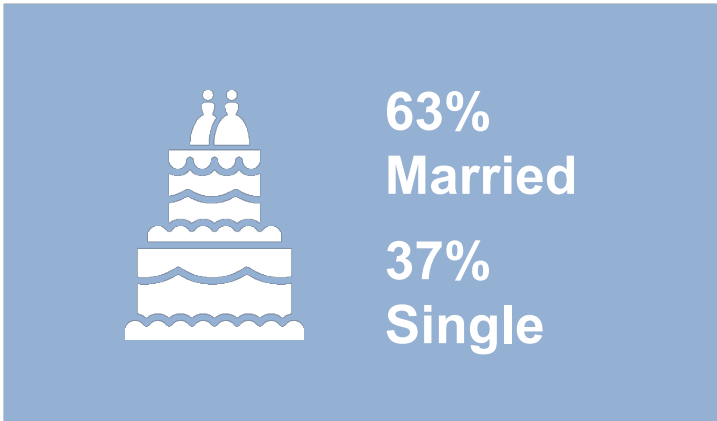
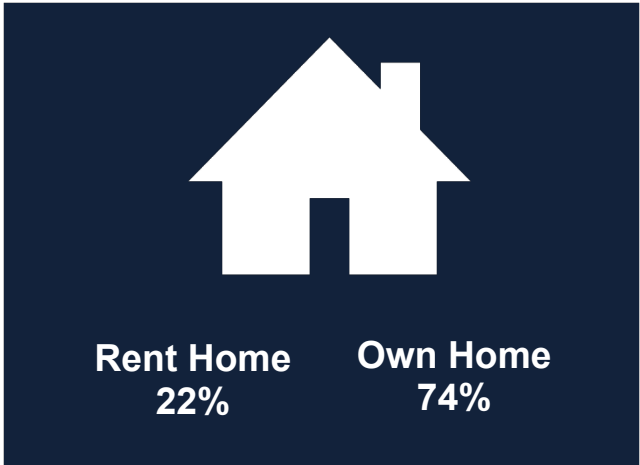
Approach

- Online survey
- Members contacted by CSA
- Non-Members contacting by leading online panels

CSA MEMBER PROFILE



NON-MEMBER PROFILE



KEY INSIGHTS

KEY INSIGHTS

- 1** CSA members are more “culinary-engaged” than the overall target population and exhibit more diverse food-purchasing behavior.
- 2** There is limited awareness and familiarity of community supported agriculture in the Hudson Valley.
- 3** CSA members are near universally satisfied with their program and virtually all will continue with their farm membership.
- 4** There is considerable interest among target non-members – particularly younger adults. Fresh food and being local are the key motivators.
- 5** The current cost and payment structure is a barrier for non-members. A payment plan option would lessen this barrier and potentially lead to increased conversion rates.
- 6** The standard payment option is more appealing than payment plans for current members.

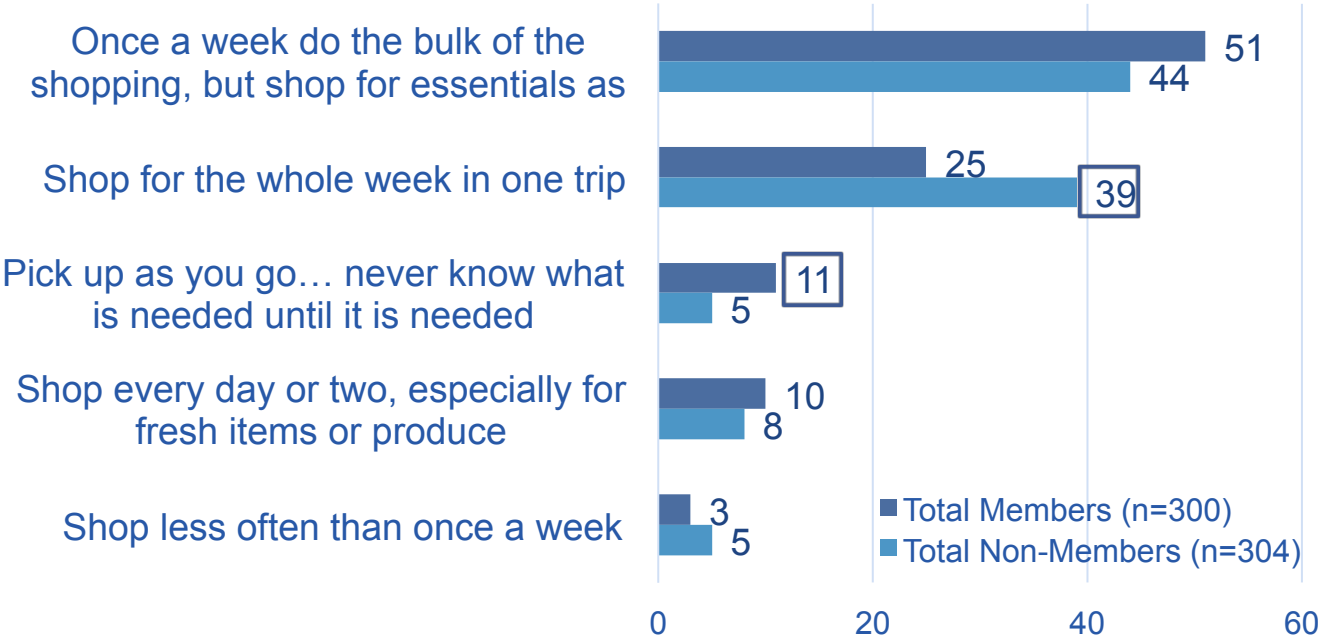
CATEGORY BEHAVIOR

Key Finding: CSA members are more “culinary-engaged” than the overall target population and exhibit more diverse food-purchasing behavior.

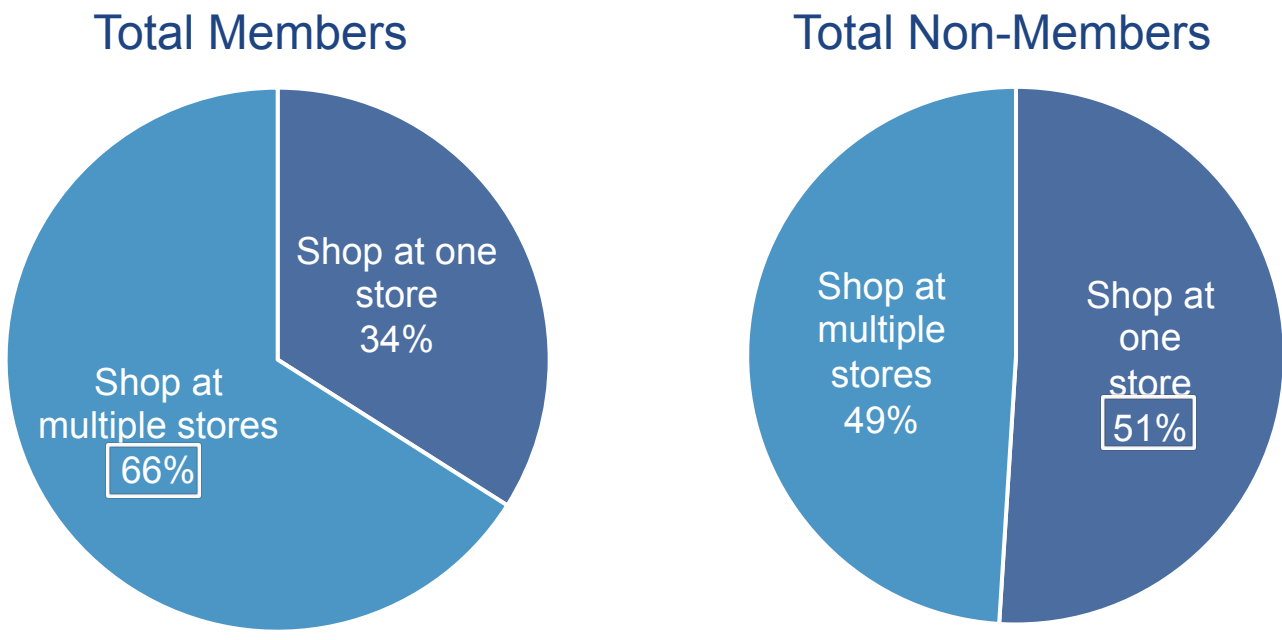
FOOD SHOPPING BEHAVIOR

CSA members tend to food shop more often than the average grocery shopper and shop a wider array of stores.

How Shop For Food/Groceries



Whether Shop At 1 Or Multiple Stores



Base: Total Respondents

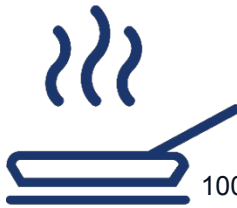
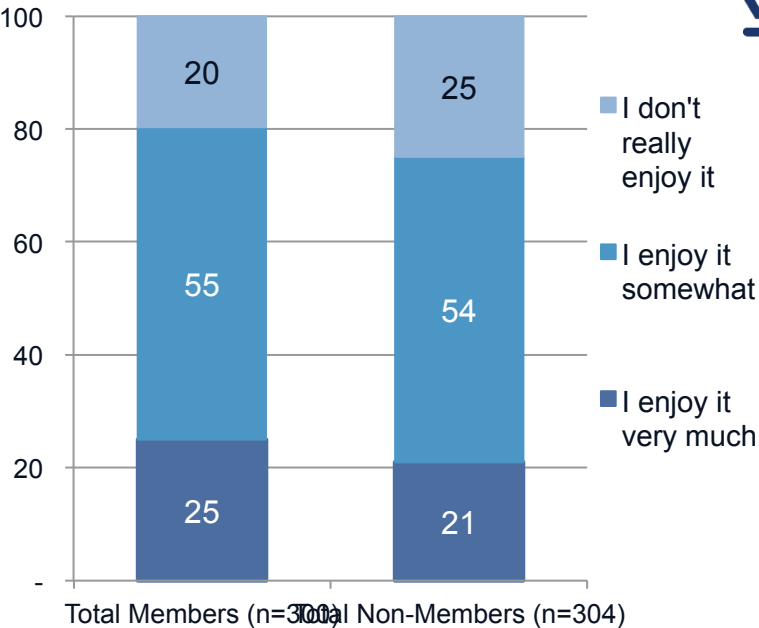
1. Which of the following best describes how you shop for food and groceries?
2. When you go food and grocery shopping do you typically...

ATTITUDES TOWARDS SHOPPING AND COOKING

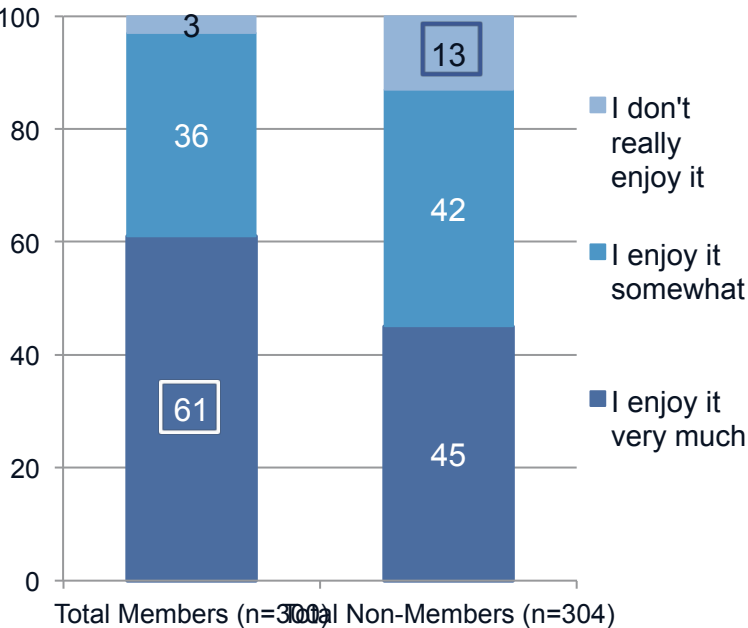
Both audiences enjoy grocery shopping, however CSA members tend to be more experienced cooks and enjoy it to a larger degree.



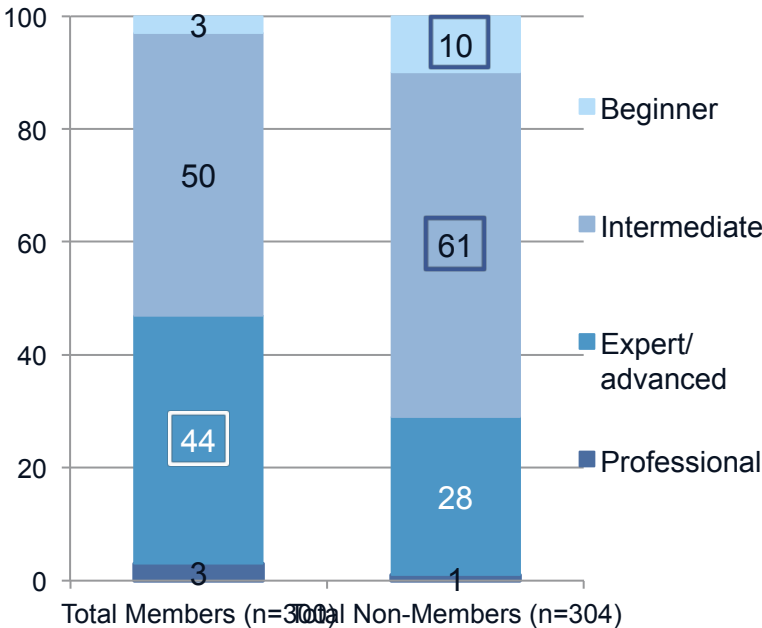
Food/Grocery Shopping



Cooking



Cooking Skill Level



Base: Total Respondents
 3. Which of the following best describes your attitude toward food and grocery shopping?
 4. Which of the following best describes your attitude toward cooking?
 5. Which of the following best describes your skill level when it comes to cooking?

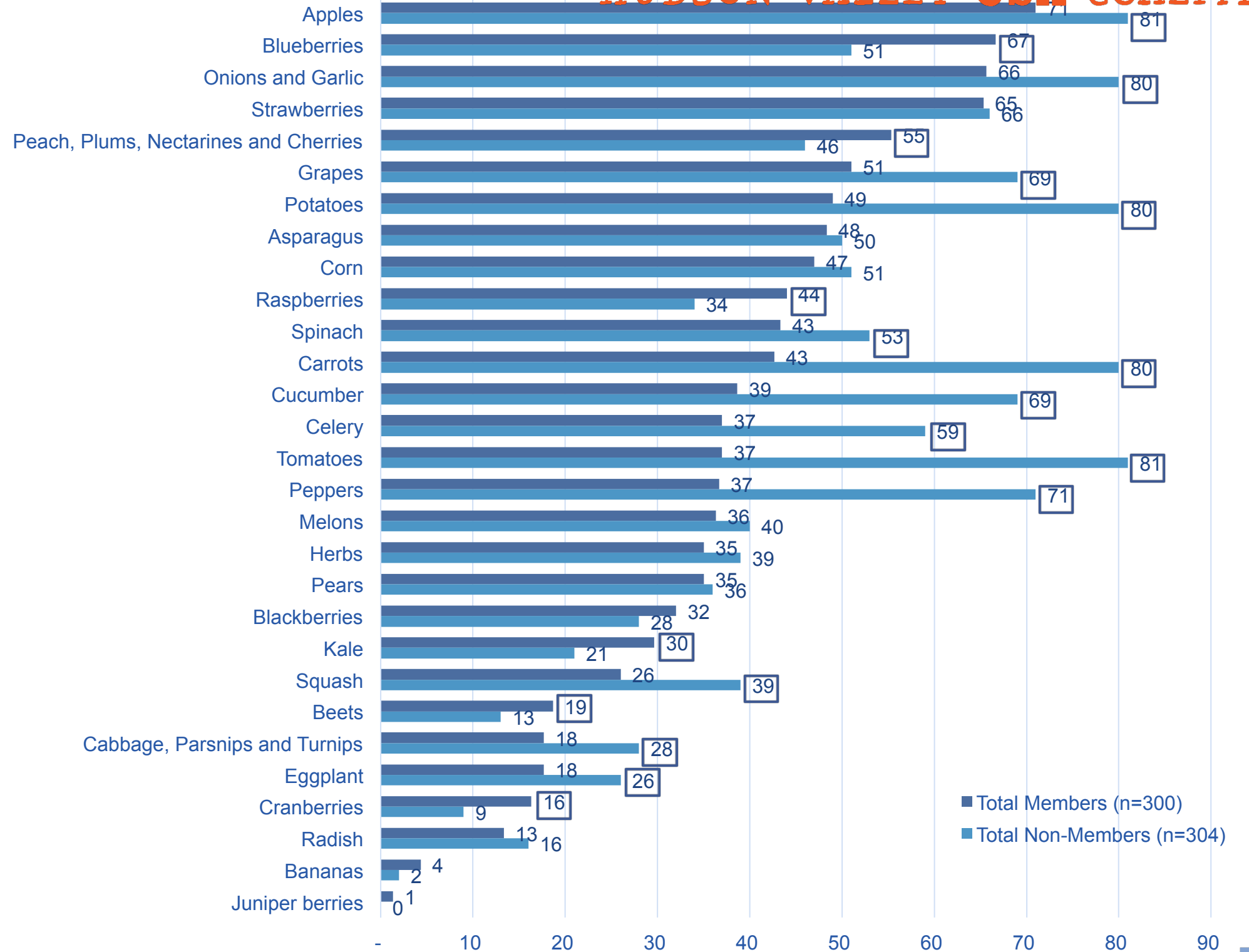
FRESH PRODUCE PURCHASE BEHAVIOR

Apples, blueberries, onions & garlic, and strawberries are the most popular types of produce.

CSA members also regularly purchase stone fruits and grapes.

Four in five target consumers commonly purchase apples, tomatoes, carrots, onions & garlic, and potatoes.

HUDSON VALLEY CSA COALITION



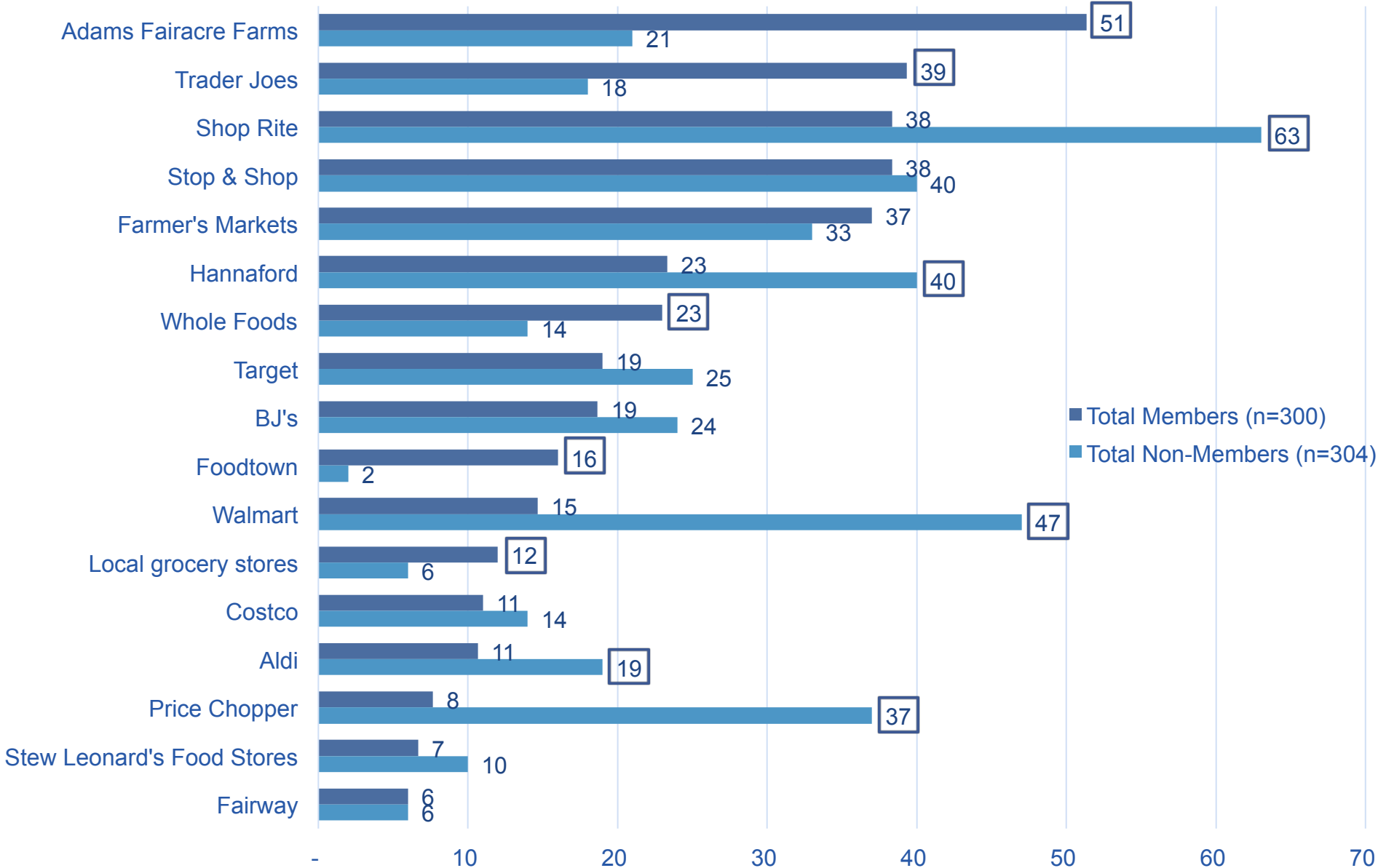
Base: Total Respondents

6. Which of the following types of fresh produce do you regularly purchase in addition to what you receive in your CSA share?

GROCERY STORE BEHAVIOR: PAST 3 MONTH SHOPPING

Adams Fairacre Farms is by far the most visited store among CSA members in the past three months, followed by Trader Joe's, Shop Rite, Stop & Shop, and farmer's markets.

Among target consumers (non-members), Shop Rite is by far the most shopped grocery store, followed by Walmart, Hannaford, Stop & Shop, and Price Chopper.



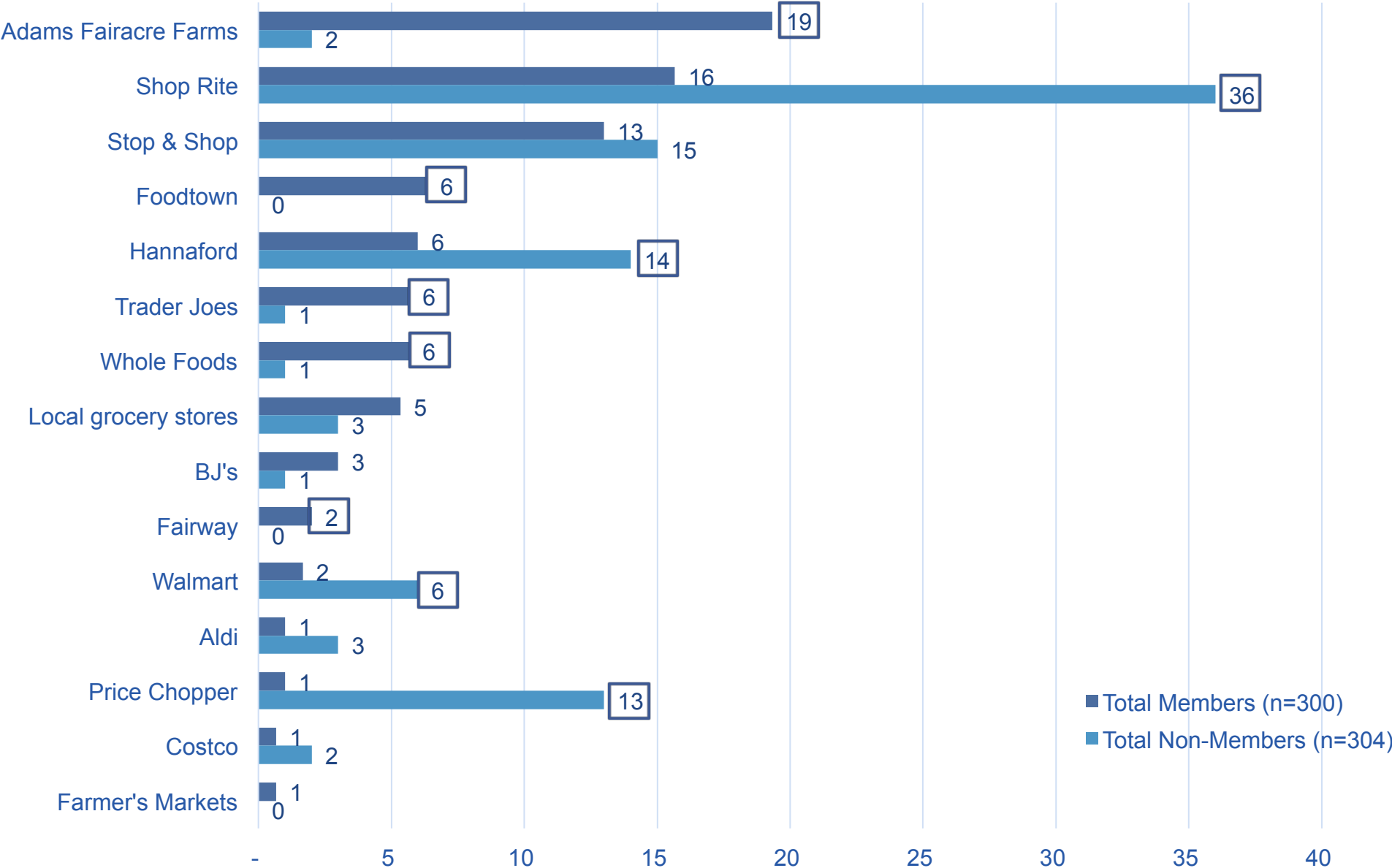
Base: Total Respondents

7. Aside from CSAs, which, if any, of the following stores have you shopped at for food or groceries in the past 3 months?

GROCERY STORE BEHAVIOR: PRIMARY STORE

Adams Fairacre Farms is the most commonly primary grocery store among CSA members, followed by Shop Rite and Stop & Shop.

Shop Rite is by far the most shopped grocery store among non-members, followed by Stop & Shop, Hannaford, and Price Chopper. Only 2% of target consumers shop at Adams most often.



Base: Total Respondents

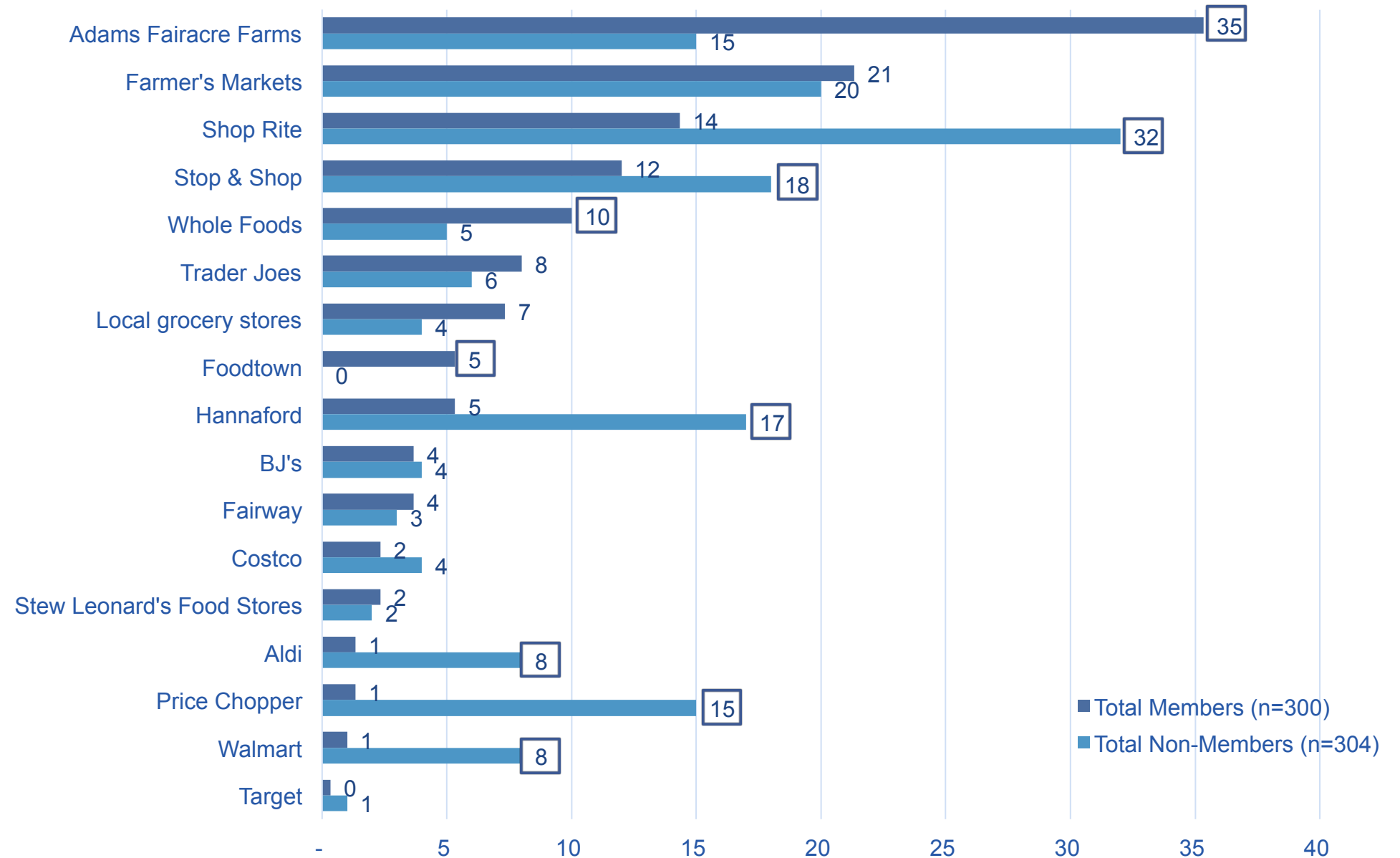
8. And aside from CSAs, what do you consider to be your primary grocery or food store?

GROCERY STORE BEHAVIOR: FRESH PRODUCE SHOPPING

Adams Fairacre Farms is shopped for produce by more than one-third of members, compared to one in seven target consumer/non-members who shop at the store.

Further, one-fifth of both audiences shop at farmer's markets for produce.

Shop Rite is a produce destination for one-third of non-members, and nearly one in five shop at Stop & Shop and Hannaford.



Base: Total Respondents

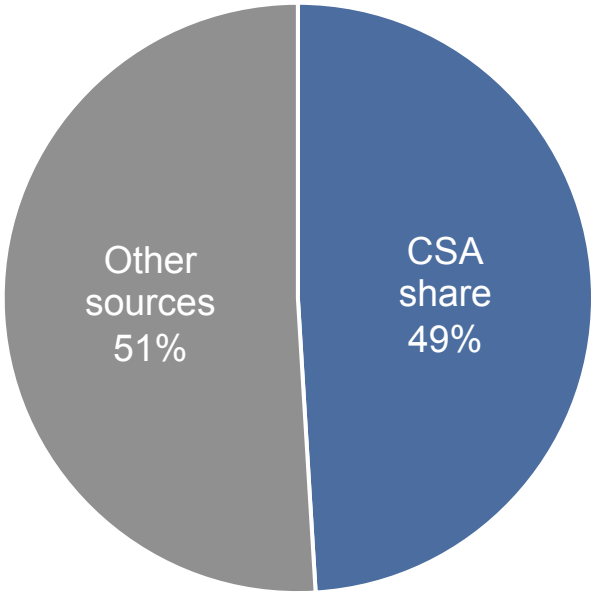
9. Aside from CSAs, where do you typically shop for fresh produce?

CSA SHARE USAGE (MEMBERS)

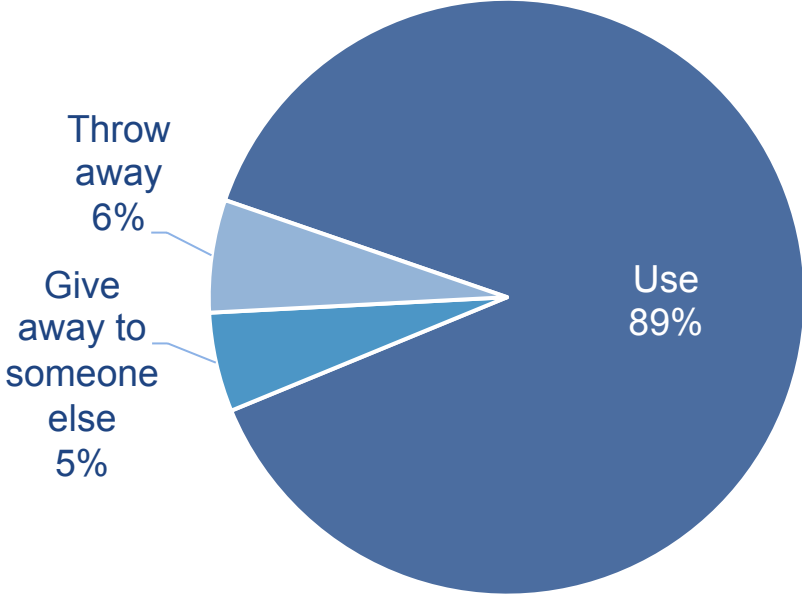
During CSA season about one-half of members' weekly food comes from the program and nearly all of the shares are used by members.

84% of members in the survey receive a share on a weekly basis.

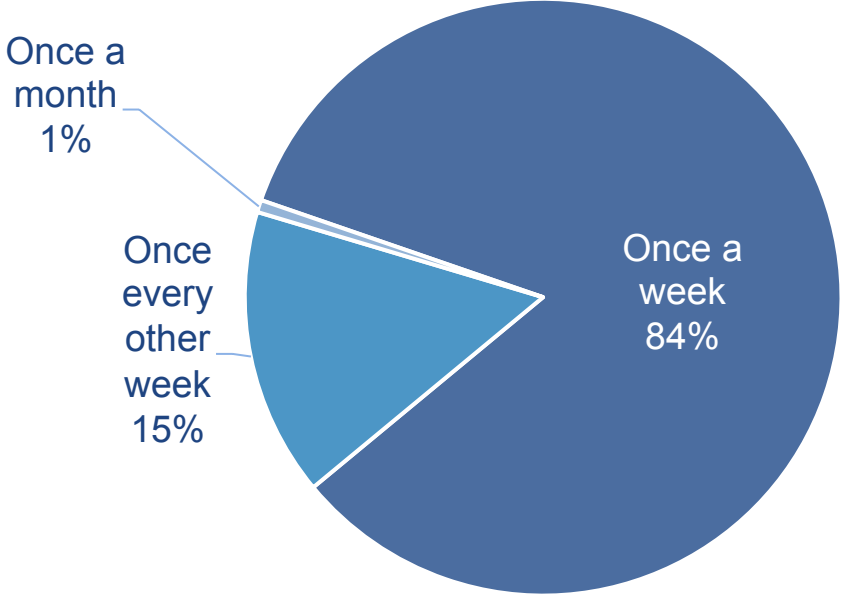
Food Coming From CSA Share vs Other Sources



Share Usage



Share Frequency



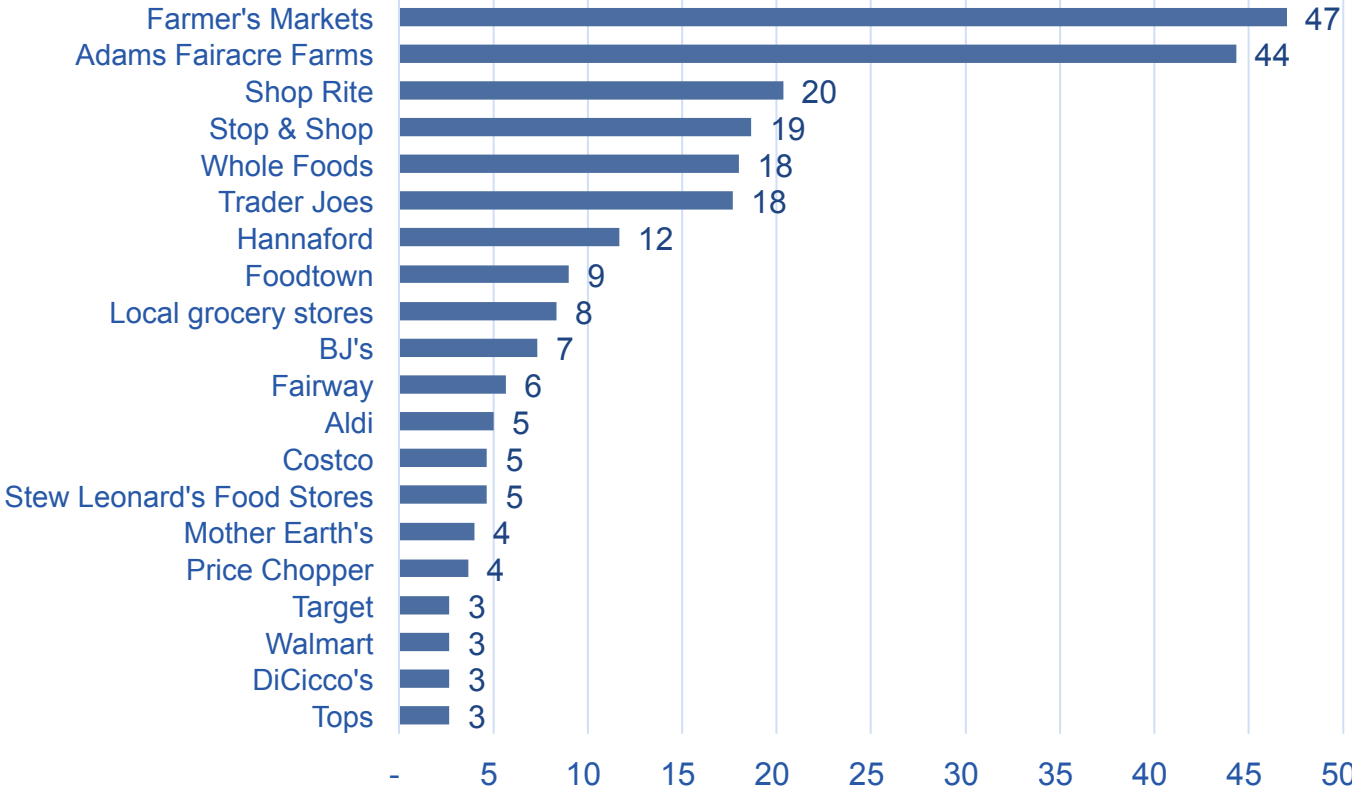
Base: Total Members (n=300)

- 10. During the time of year when you are receiving regular food from your share, how much of your weekly food is coming from your share versus other sources?
- 11. What percentage of your share do you typically end up being able to use in your household versus throwing or giving away to someone else?
- 13. How often do you receive a share?

CSA REPLACEMENTS (MEMBERS)

Farmer's Markets and Adams Fairacre Farms are the two primary replacements for CSA shares. Females and older adults are significantly more likely to identify Farmer's Markets as replacements, while males are significantly more likely to consider Adams a replacement.

Shop Rite, Stop & Shop, Whole Foods, and Trader Joes are considered replacements to one in five members.



	Gender		Age	
	Male	Female	18-39	40+
Total Members	(53)	(247)	(102)	(198)
	%	%	%	%
Farmer's Markets	34	50	36	53
Adams Fairacre Farms	58	41	42	45
Shop Rite	13	22	19	21
Stop & Shop	17	19	23	17
Whole Foods	17	18	25	15
Trader Joes	8	20	23	15
Hannaford	13	11	11	12
Foodtown	6	10	13	7
Local grocery stores	15	7	2	12
BJ's	4	8	8	7
Fairway	4	6	4	7
Aldi	2	6	6	5
Costco	2	5	2	6
Stew Leonard's Food Stores	9	4	4	5
Mother Earth's	6	4	3	5
Price Chopper	4	4	3	4
Target	-	3	7	1
Walmart	4	2	3	3
DiCicco's	4	2	1	4
Tops	4	2	6	1

Base: Total Members (n=300)

12. If you did not currently have a CSA share, or thinking about a time before you had a CSA share, where would you instead purchase the food you currently receive through the share?

IMPLICATIONS: CATEGORY BEHAVIOR

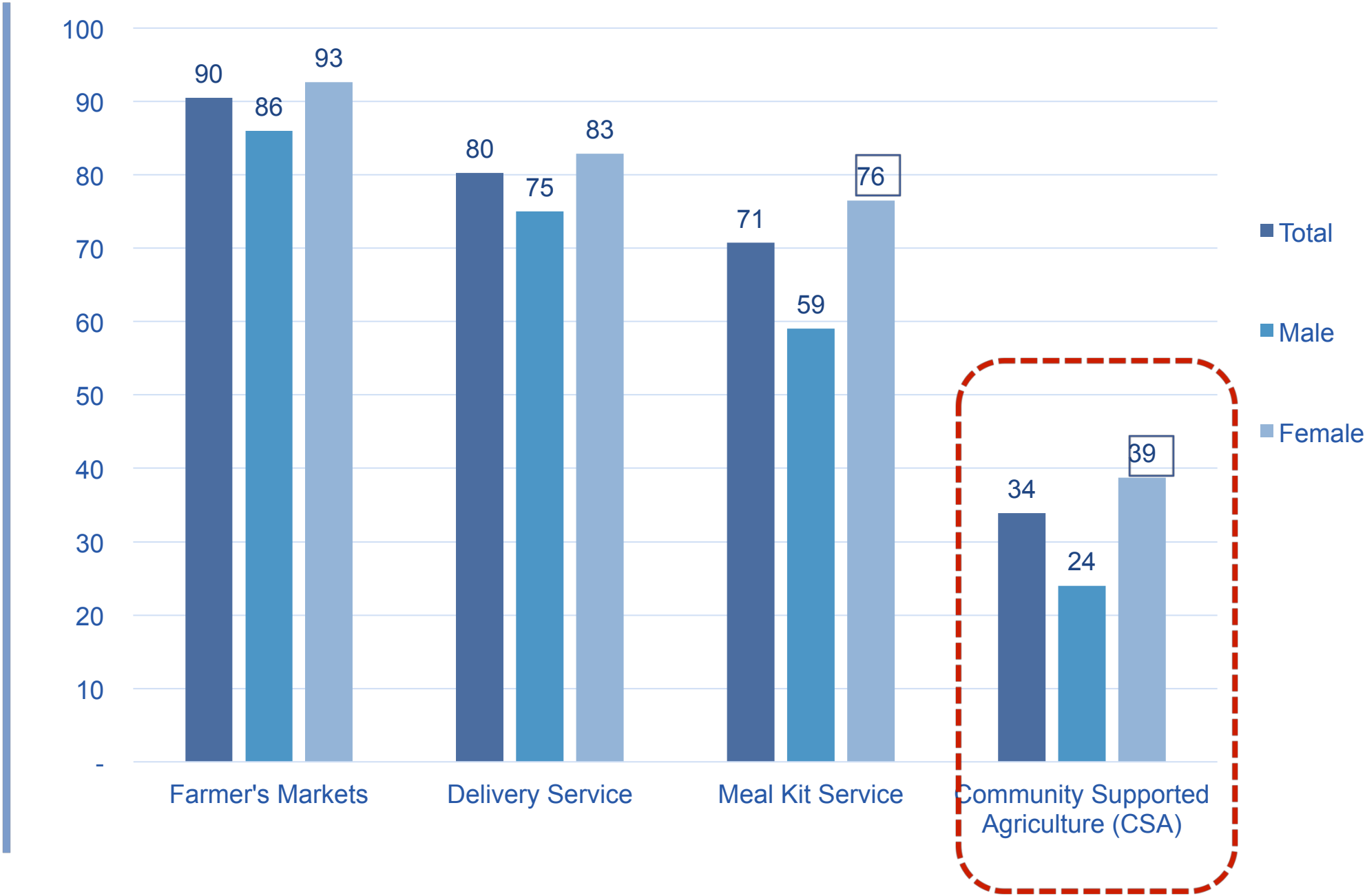
- Customer acquisition targeted to those who love being in the kitchen appears to be a viable strategy.
- Farmer's markets provide an opportunity for engagement with potential members. Capturing contact information and providing share information on-site can result in conversion.
- Social media advertising targeting Adams customers may be impactful.

CSA AWARENESS & PERCEPTIONS (NON-MEMBERS)

Key Finding: There is limited awareness and familiarity of community supported agriculture in the Hudson Valley.

FOOD SERVICES AWARENESS

34% of target consumers are aware of CSAs. This includes 39% of females and 24% of males.

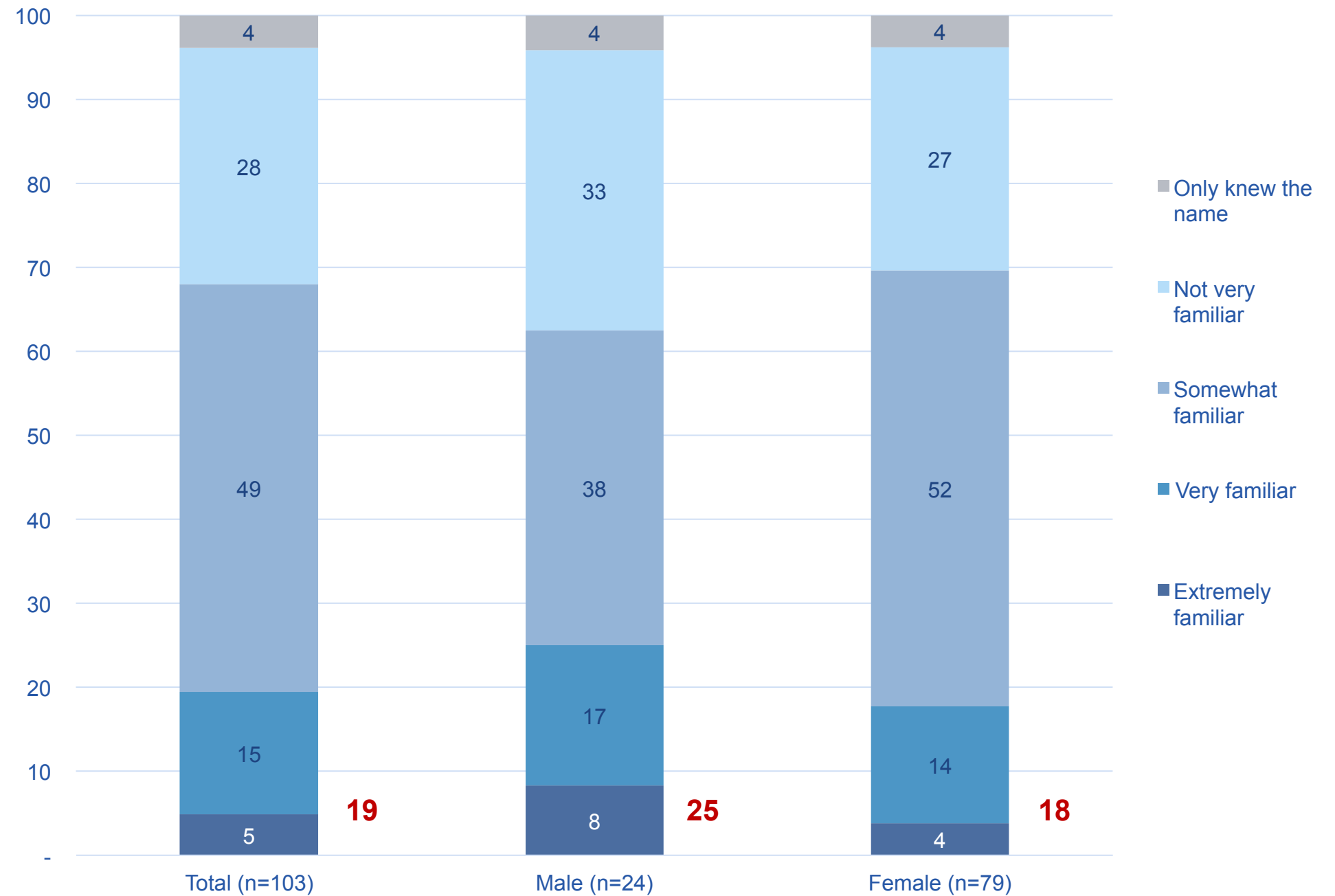


Base: Total Non-Members (n=304)
S13. Which, if any, of the following food services have you ever heard of?

CSA FAMILIARITY

19% of target consumers aware of CSAs are extremely or very familiar with what they offer.

Although males are less likely to know CSAs, those aware are more likely to have strong familiarity.



Base: Total Non-Members Aware Of CSA (n=103)

10. Before today, how familiar were you with CSA programs and what they offer?

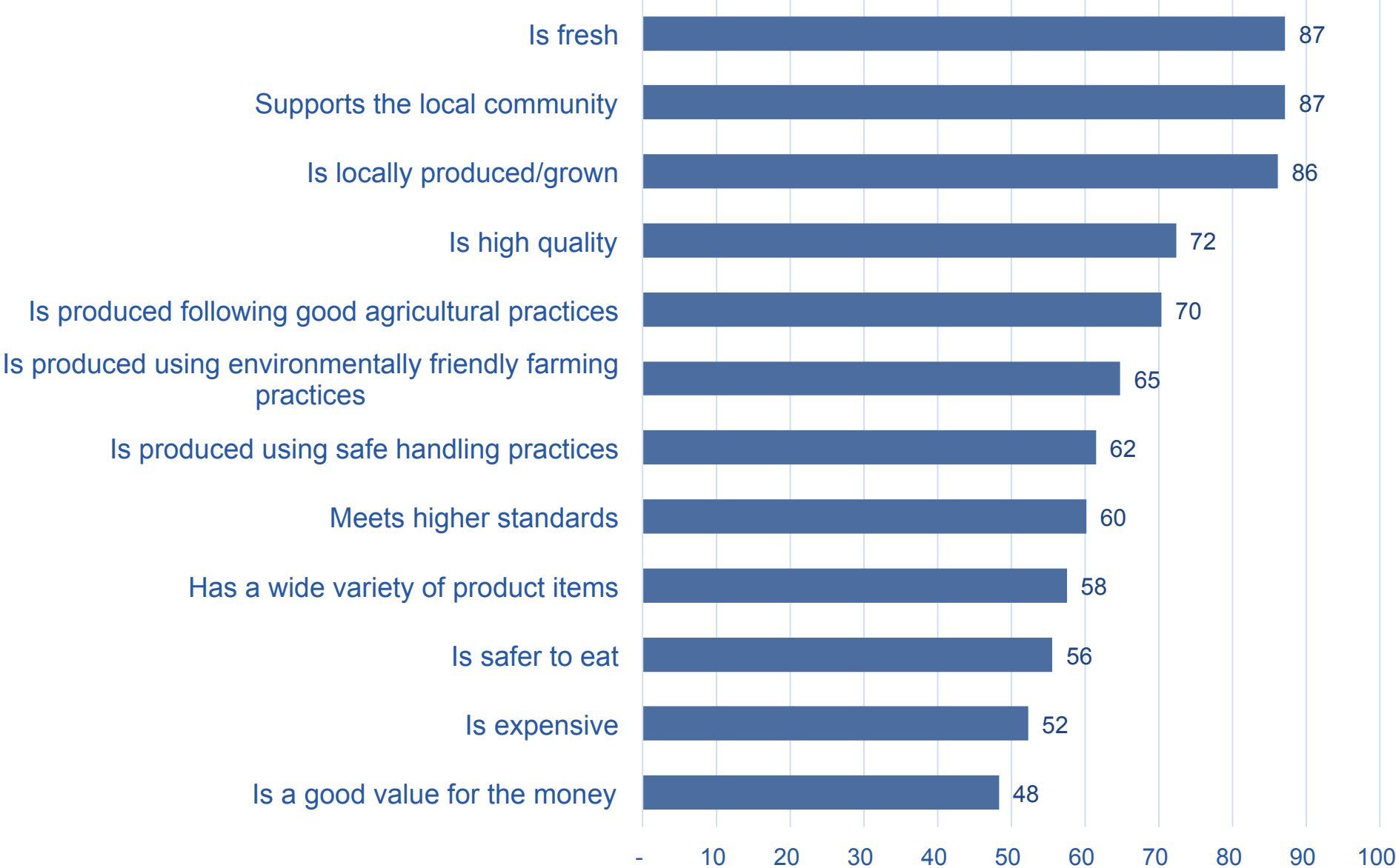
Community Supported Agriculture, or CSA, subscriptions are share plans where you receive a regular selection of freshly harvested food from a local farm.

CSA PERCEPTIONS (AGREE COMPLETELY/SOMEWHAT)

Based on a brief description, food from CSA programs are widely perceived as being fresh, supporting the local community, and being produced locally.

Seven in ten believe it would be high quality and follows good agricultural practices.

However, a slight majority believe it would be expensive and less than one-half think it would be a good value for the money.



Base: Total Non-Members (n=304)

11. How much do you agree or disagree that each of the following describes the food you would receive from a CSA program?

Community Supported Agriculture, or CSA, subscriptions are share plans where you receive a regular selection of freshly harvested food from a local farm.

CSA PERCEPTIONS (AGREE COMPLETELY/SOMEWHAT)

Younger consumers have more widely held perceptions based on the CSA definition.

This includes being significantly more likely than older adults to believe CSAs:

- Follow good agricultural practices
- Use safe handling practices
- Meet higher standards
- Make safer to eat food

	Gender		Age		Household Income	
	Male	Female	25-44	45-65	Under \$100k	\$100k+
Total Non-Members	(100)	(204)	(105)	(199)	(164)	(135)
	%	%	%	%	%	%
Is fresh	83	89	90	85	88	86
Supports the local community	85	88	87	87	88	87
Is locally produced/grown	80	89	88	85	88	85
Is high quality	69	74	79	69	78	66
Is produced following good agricultural practices	68	72	81	65	73	69
Is produced using environmentally friendly farming practices	60	67	70	62	69	59
Is produced using safe handling practices	58	63	70	57	64	59
Meets higher standards	58	61	70	55	63	57
Has a wide variety of product items	51	61	65	54	65	50
Is safer to eat	51	58	64	51	64	46
Is expensive	51	53	52	52	51	55
Is a good value for the money	45	50	50	47	54	42

Base: Total Non-Members (n=304)

11. How much do you agree or disagree that each of the following describes the food you would receive from a CSA program?

IMPLICATIONS: CSA AWARENESS & PERCEPTIONS

- Community supported agriculture in the Hudson Valley has a top-of-the-funnel issue – limited awareness and familiarity. Raising awareness and educating consumers should be a primary goal for the coalition.
- The idea of CSAs generates very positive imagery and positions member farms as producing fresh, high quality, and safe locally grown food – there is a strong story to be told.

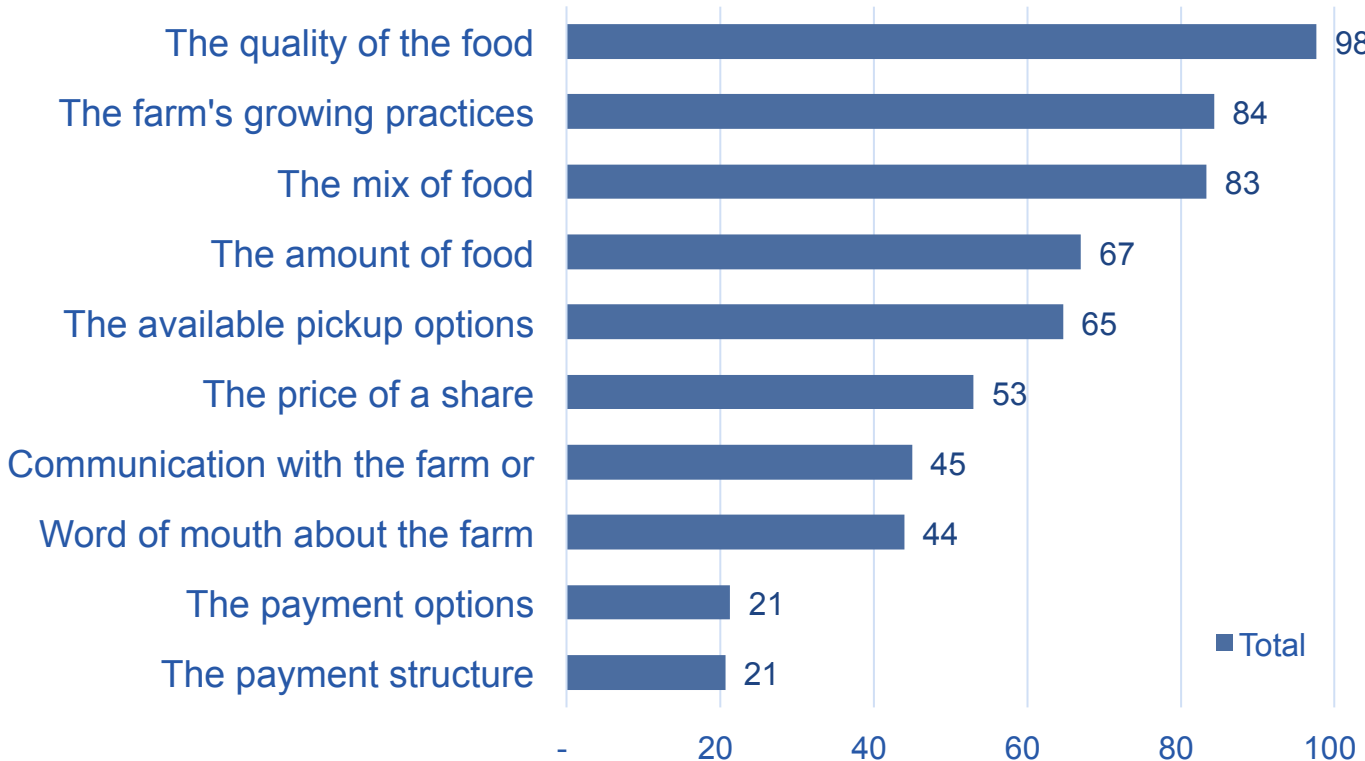
THE CSA EXPERIENCE (MEMBERS)

Key Finding: CSA members are near universally satisfied with their program and virtually all will continue with their farm membership.

CSA FEATURE IMPORTANCE (EXTREMELY/VERY IMPORTANT)

Food quality is universally important when selecting a CSA, more than four-fifths indicate growing practices and the food mix as extremely or very important, and two-thirds find the food amount and available pickup options to be important.

Millennials are more price sensitive while older generations place more importance on growing practices and farm/farmer communications.



	Gender		Age	
	Male	Female	18-39	40+
Total Members	(53)	(247)	(102)	(198)
	%	%	%	%
The quality of the food	98	98	95	99
The farm's growing practices	74	87	77	88
The mix of food	68	87	81	84
The amount of food	62	68	73	64
The available pickup options	47	68	72	61
The price of a share	49	54	67	46
Communication with the farm or farmer	49	44	36	49
Word of mouth about the farm	38	45	44	44
The payment options	19	22	27	18
The payment structure	17	21	25	18

Base: Total Members (n=300)

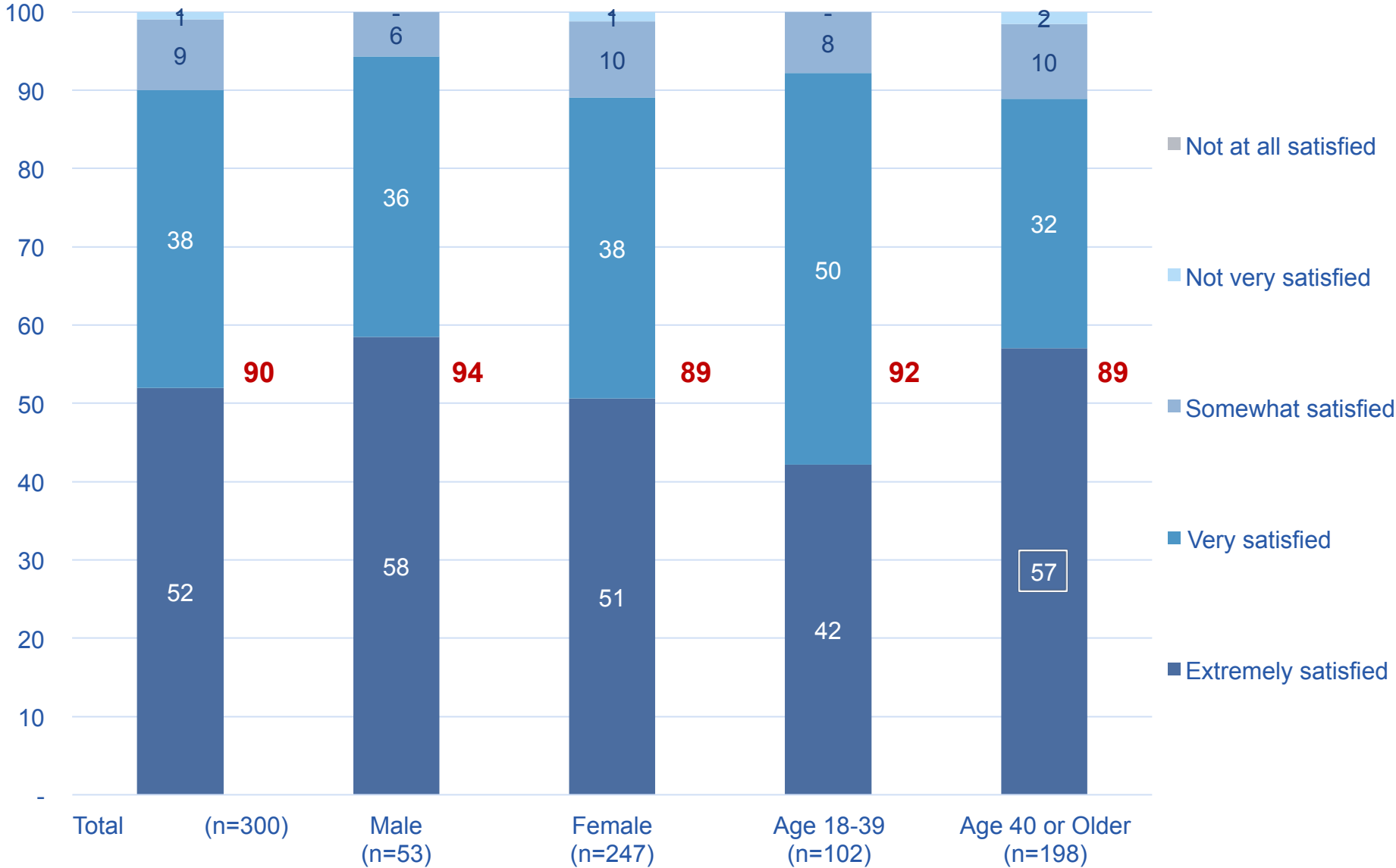
14. How important were each of the following to you when selecting a CSA to join?

OVERALL CSA SATISFACTION

Overall, members are very satisfied with their current CSA share program.

52% indicate they are extremely satisfied and 90% are at least very satisfied.

Only 1% report having any level of dissatisfaction.



Base: Total Members (n=300)
 16. Overall, how satisfied are you with your current CSA share program?

CSA SHARE PROGRAM LIKES

	Total
Total Members	(300)
	%
<u>Food/Product Attributes (net)</u>	<u>81</u>
<u>Fresh (subnet)</u>	<u>44</u>
Fresh produce/fresh fruits/fresh vegetables	22
Fresh food/freshness (unspecified)	21
<u>Selection (subnet)</u>	<u>31</u>
Variety/variety of food (unspecified)	13
Seasonal food/eating with the seasons	8
<u>Organic (subnet)</u>	<u>23</u>
Organic (unspecified)	14
Organic produce/organic fruits/organic vegetables	9
<u>Quality (subnet)</u>	<u>17</u>
Quality food/quality products (unspecified)	10
<u>Miscellaneous Food/Product Attributes Mentions</u>	
Local/locally grown	19
<u>Experience (net)</u>	<u>59</u>
<u>Try New Things (subnet)</u>	<u>22</u>
Trying new produce/trying new fruits/trying new vegetables	16
<u>Socialization (subnet)</u>	<u>17</u>
Relationship with farmers/forming a bond with the farmers	9
<u>Pick Your Own (subnet)</u>	<u>15</u>
U-pick opportunities/pick your own (unspecified)	12
<u>Miscellaneous Experience Mentions</u>	
Sense of community/lovely community feeling/building a connection with my community	12
<u>Local Support (net)</u>	<u>33</u>
Supporting local farms/farmers/supporting farms/farmers	29

Fresh

“The freshness of the food which makes it last longer and the fact that it is grown organically and ethically by people I have a personal relationship with.”

“We absolutely love the freshness of the food as well as the variety of what is offered. It has introduced us over the years to some food we had never tried before. We enjoy the opportunity to do some pick your own and is a great way to meet/chat with folks.”

“I love getting fresh food that’s in season every week. Having an abundance of fresh food enables me to eat well, and share it with friends for a reasonable cost.”

Local

“Supporting local farms. The variety of food and excitement of trying new food. Eating in season. Eating organic.”

“Knowing that the food is fresh from the farm and organically grown and that I am supporting the farm and the farmers.”

“Supporting local farmers and sustainability. Feeding my family fresh organic food. Meeting the farmers”

Food quality, supporting local business, trying new foods, product variety, and being organic are all widely cited as reasons why members like CSA share programs.

Base: Total Members (n=300)

15a. What do you like about CSA share programs? Please be as specific as possible.

CSA SHARE PROGRAM DISLIKES

Pick Up Times

“There isn't much that I don't like, but if I had to choose something, maybe the restrictive window of time for pick-up.”

“Limited and sometimes inflexible pick up options are difficult for working families. I understand and appreciate the logistical reasoning behind it but it's still my biggest issue.”

“The pick up times are not flexible. I have had to miss a couple shares because I could not arrange to have my pick up day changed.”

Unwanted Items

“Receiving items that I don't know how to use, or that are time consuming to prepare.”

“When there's too much of an item I don't like or not enough options/variety. Sometimes the pickup structure doesn't work with my schedule.”

“Having to take produce that we do not like and as happened this year a change in farmer resulting in not getting wanted vegetables and being inundated with unwanted vegetables.”

	Total
Total Members	(300)
	%
<u>Disliked Something (grand net)</u>	83
<u>Food/Product Issues (net)</u>	50
<u>Selection (subnet)</u>	31
Produce I don't want/things I don't like/we don't eat	10
Lack of variety/needs more variety (unspecified)	6
Lack of fruit/not getting enough fruit/not getting fruit weekly/seems to be only vegetables	4
<u>Quantity Issues (subnet)</u>	20
Low volume/not enough/don't receive enough for our family/not enough for a meal	6
Too much of a specific fruit/vegetable	5
Too much for us/quantity is too much for a small family	4
<u>Experience (net)</u>	31
<u>Inconvenience (subnet)</u>	24
Pick up times/inconvenient pick up times/not much flexibility with pick up times/having to pick up at a set time/can't always pick up my share at the pick up day/time	15
Crowded/cramped at pick up/distribution times congested	3
Hard to meal plan/makes meal planning difficult/having to come up with menus based on what you get	3
<u>Miscellaneous Experience Mentions</u>	
Pick your own issues/don't like/limited pick your own options	5
<u>Miscellaneous Disliked Something Mentions</u>	
Expensive/dislike the prices/pricing could be better	9
None/nothing	16

Although members are very satisfied, there were a number of issues raised. Pick up times, receiving unwanted items, and low quantities were the issues most often voiced by members.

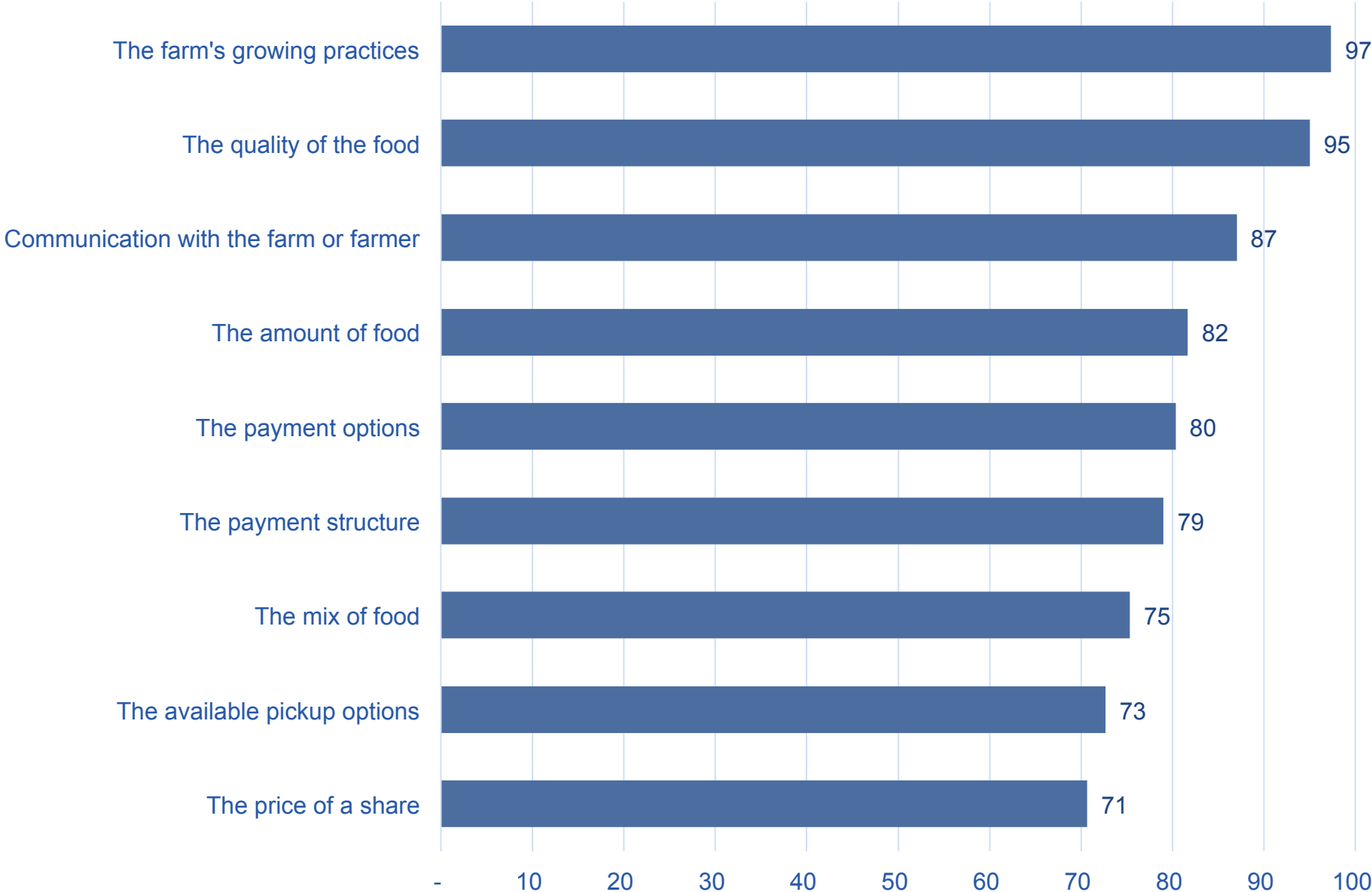
Base: Total Members (n=300)
 15b. And what do you dislike about CSA share programs? Please be as specific as possible.

CSA PROGRAM SATISFACTION (EXTREMELY/VERY SATISFIED)

CSA Members are universally satisfied with farm's growing practices and food quality.

Further, 79% or more members are satisfied with farm/farmer communications, food amounts, payment options, and payment structure.

Members are least satisfied with pickup options and share pricing.



Base: Total Members (n=300)

17. And how satisfied are you with each of the following aspects of your current CSA share program?

CSA PROGRAM IMPORTANCE VS SATISFACTION

The two most important features have the highest overall satisfaction:

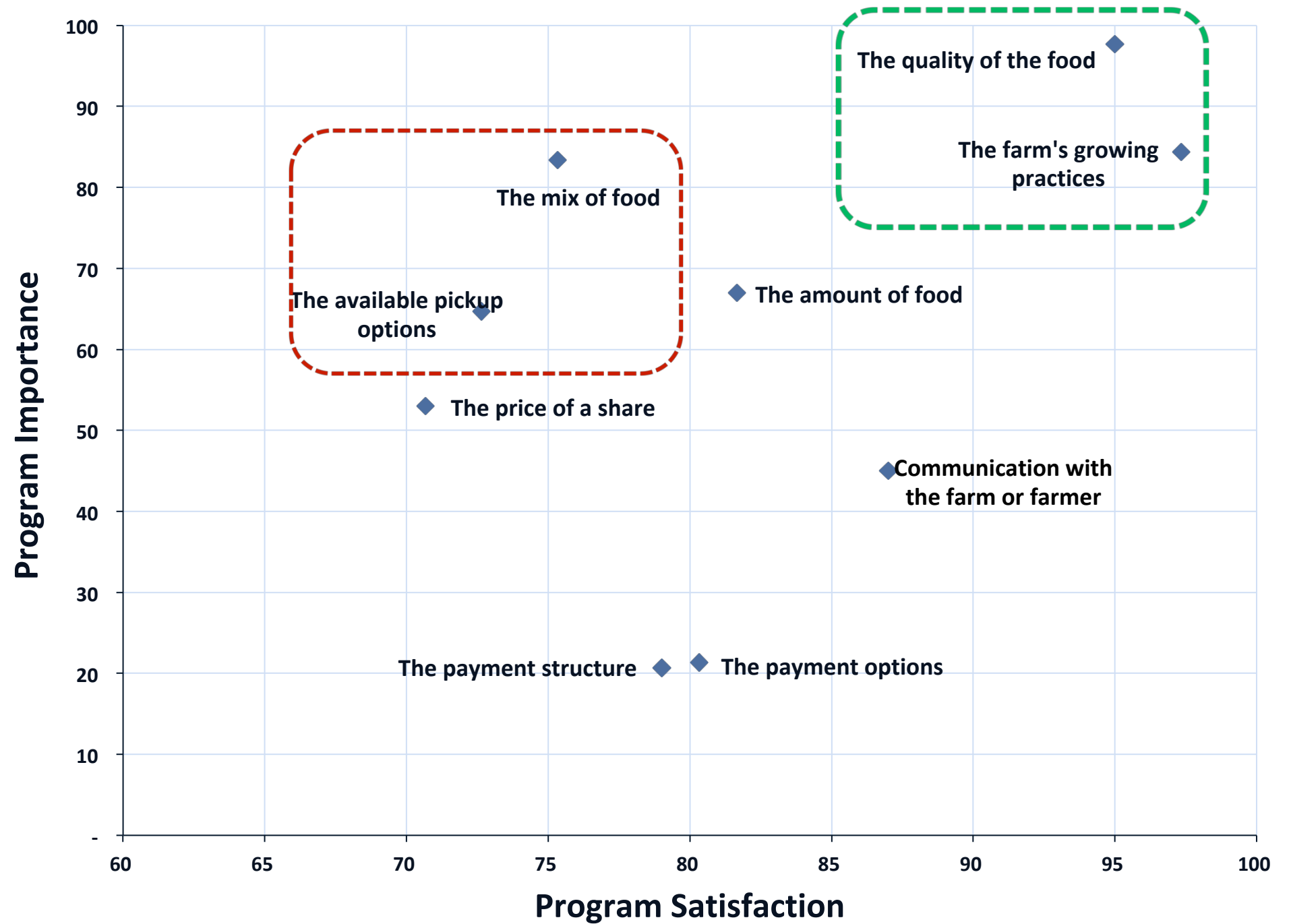
- Food quality
- Growing practices

Two areas to address

- Mix of food
- Available pickup options

FYI Millennials are more price sensitive than older generations.

HUDSON VALLEY CSA COALITION



Base: Total Members (n=300)

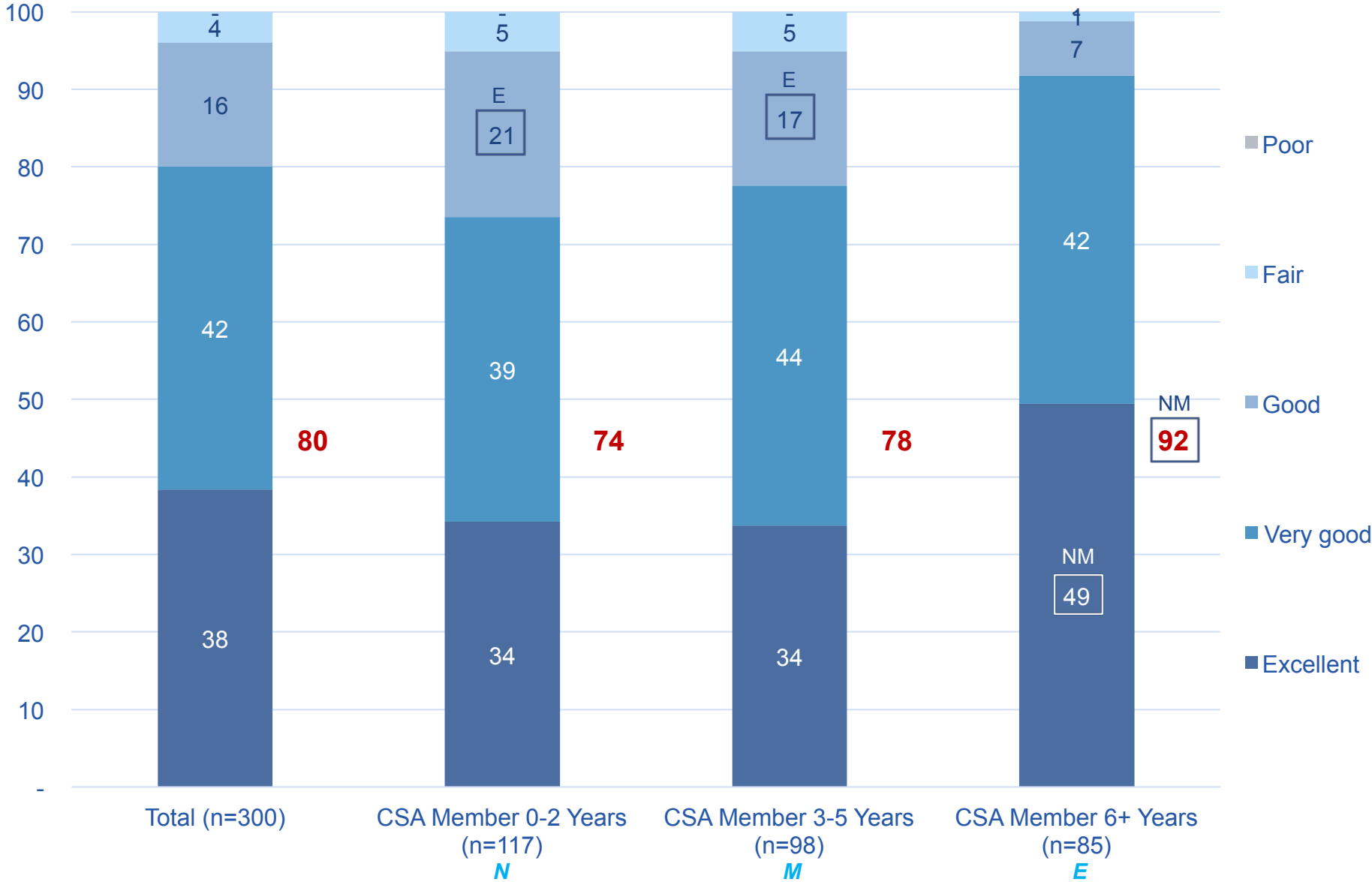
14. How important were each of the following to you when selecting a CSA to join?

17. And how satisfied are you with each of the following aspects of your current CSA share program?

CSA SHARE VALUE

80% of members believe CSA shares provide an excellent or very good value for the money, with perceived value increasing with length of CSA membership.

Only 4% indicate it's a fair value, and none feel it's poor.



Base: Total Members (n=300)

18. Considering the amount and quality of food you receive in your CSA share, how would you rate its value for the money?

NET PROMOTER SCORE

When customers are highly likely to recommend a brand, it means they are willing to stake their own reputation to promote a product. Reichheld's* loyalty measurement is determined by asking customers to use a scale of 0 to 10 to rate how likely they are to recommend the brand/product to a friend or colleague.

From these ratings three types of customer groups can be determined:

- Promoters - Extremely likely to recommend (rate 9 or 10)
- Passively satisfied - Rated 7 or 8
- Detractors - Extremely unlikely to recommend (rated 0 - 6)

$$\text{NPS} = \% \text{ thumbs up} - \% \text{ thumbs down}$$

This score can be used to measure loyalty and predict the growth that a company can expect from having loyal customers.

The companies with the most loyal and enthusiastic customers and the resulting growth have scores between +75 and +80. However Reichheld determined in his research that the **median Net Promoter Score (NPS) of over 400 companies in 28 different industries was +16.**

* Frederick F. Reichheld, Director of Bain & Company. *Harvard Business Review*, December 2003.

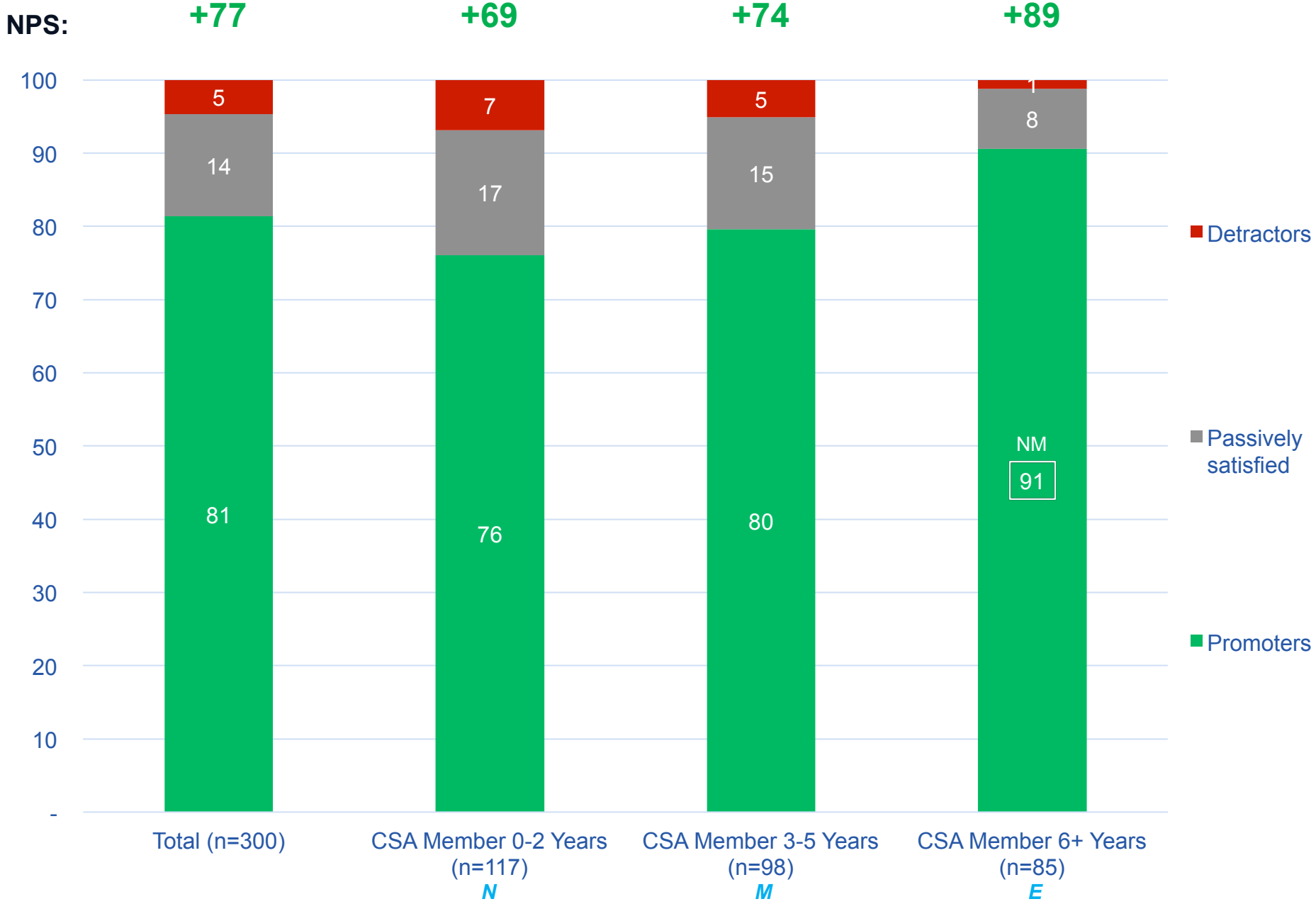
HUDSON VALLEY CSA COALITION

CSA SHARE PROGRAM NET PROMOTER SCORE

Hudson Valley CSA share programs have a very strong +77 NPS among members.

81% of members are considered promoters of CSA share programs, meaning they are strong brand advocates who would recommend it to others.

Only 5% of members are brand detractors.



NPS = % 👍 - % 👎

Base: Total Members (n=300)

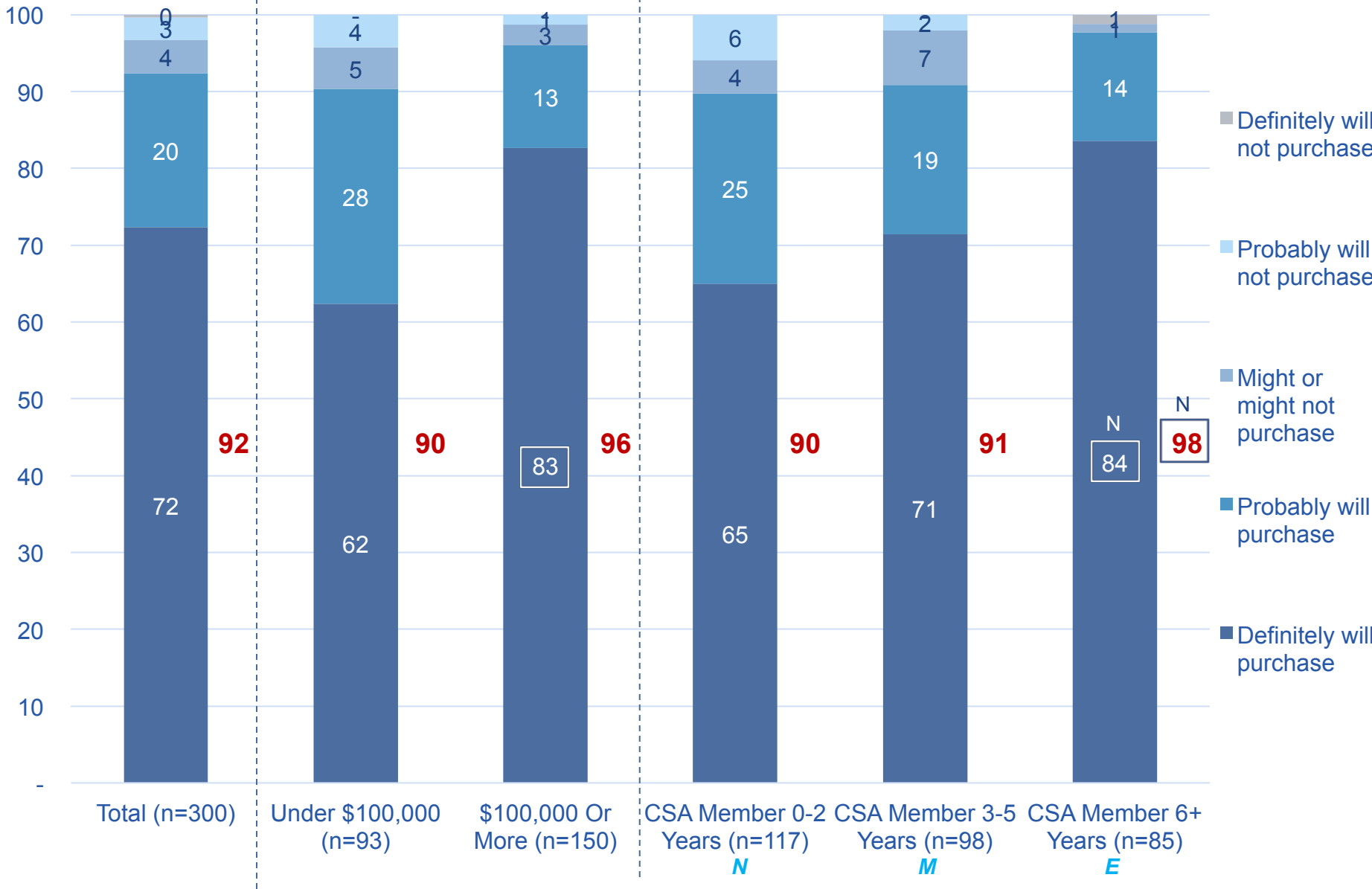
19. On a scale of 0 to 10, where a 10 means Extremely Likely, a 5 means Neutral, and a 0 means Extremely Unlikely, how likely would you be to recommend CSA share programs to a friend, family member, or colleague?

CSA CONSIDERATION

92% of members will likely renew their share for another year, including 72% who definitely will purchase another share.

Long-term members and those with an annual household income of \$100,000 or more are significantly more likely to definitely renew.

3% of members are unlikely to renew.

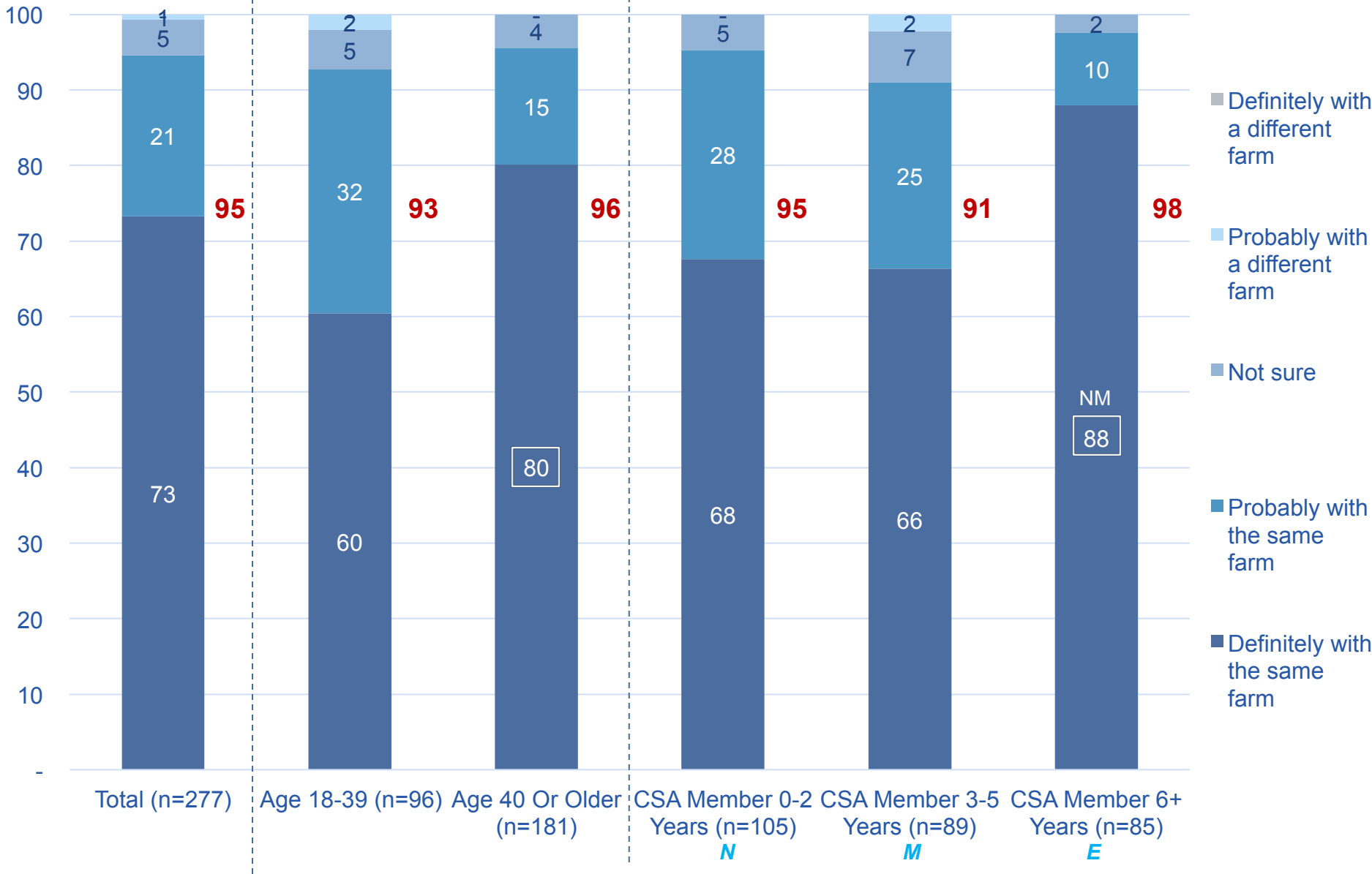


Base: Total Members (n=300)
 20. How likely are you to purchase a CSA share in 2019?

PLANS TO STAY WITH CURRENT FARM

Virtually all members plan to stay with their current farm in the upcoming year.

Millennials are most likely to shop around – 32% indicate they “probably” will stay.



Base: Total Members Definitely/Probably Will Purchase Again
 21. Thinking about 2018, do you plan to purchase a share with your current farm or with a different one?

CSA SHARE PROGRAM IMPROVEMENTS

	Total
Total Respondents	(300)
	%
Selection (net)	42
Produce (subnet)	29
Fruits (sub-subnet)	16
Fruit/more fruit/mostly all veggies/focuses only on vegetables (unspecified)	12
Vegetables (sub-subnet)	13
Asparagus	2
More salad greens/more lettuce	2
Vegetables/more vegetables (unspecified)	2
Miscellaneous Selection Mentions	6
Larger quantity/quantities should be larger	3
More variety/selection (unspecified)	3
Miscellaneous Mentions	7
More pick up options/more pick up times/more pick up days	4
Include some recipes/meal planning tips	4
Better communication/more information	4
Improve Pick Your Own options (more PYO options, make PYO optional, ability to PYO at your own convenience etc.)	4
More work opportunities/work shares	3
None/fine as is/satisfied	28

Fruit

“More fruit would be nice. It's been almost all veggies so far.”

“More fruit would be amazing, although I know that would be branching off into a whole new sector. The watermelons we get are exciting enough! Parking is always rough, but there's not really much that can be done.”

“I would like to see them partner with a fruit farm and offer members a fruit share.”

Pick Up

“Extended share pick up time.”

“Having a mid week pick up, like a Tuesday or Wednesday would be ideal. Only offering pickups on Friday's or Saturday's really has to change. More fruit in the share would be great. Better staff, the staff last year was extremely knowledgeable. This year, the staff at the pick up tables isn't very knowledgeable at all, or helpful. Offering a no pick option with everything boxed and ready to go would be amazing.”

“I do travel a lot for work, so I wish there were a bit more flexibility with weeks where I can't make the pickup time. because I travel a lot, I end up missing shares, and each season I do debate whether I will get my money's worth once I account for all of the missed shares.”

The most common areas of improvement focused on including more fruit, specific vegetable requests, and more pick up times and options.

Base: Total Members (n=300)

22. What, if anything, do you believe is missing from your CSA share program(s) or could be improved? Please be as specific as possible.

PROGRAM APPEAL
(EXTREMELY/VERY APPEALING)

75% of members find flexible pick-up locations/times to be extremely or very appealing – directly addressing a common barrier/concern.

Recipes/cooking suggestions, picking your own, and educational classes/workshops are also widely appealing.

Virtually all programs are more appealing to younger members.



	Age		Membership Years		
	18-39	40+	0 to 2	3 to 5	6+
Total Members	(102)	(198)	(117)	(98)	(85)
	%	%	%	%	%
			<i>N</i>	<i>M</i>	<i>E</i>
Flexible pick-up locations/times	88	68	75	81 _E	67
Recipes/cooking suggestions	76	65	70	72	64
Pick your own	80	52	62	61	62
Educational classes and workshops	68	53	61	55	56
On-farm events/social gatherings	58	46	54	47	49
Volunteer opportunities	41	26	32	28	35
Home delivery	42	25	32 _E	40 _E	19

Base: Total Members (n=300)
26. Below are a range of programs which could potentially be offered by CSA farms. How appealing do you find each of these programs?

IMPLICATIONS: THE CSA EXPERIENCE

- Overall, CSA programs are currently delivering a positive experience, which results in long-term usage and advocacy. Members are natural spokespeople and encouraging/providing methods to share experiences is a great way to acquire new members.
- Picking up shares is a key pain point in the customer experience. This can be addressed with extended hours and more flexibility.
- Product variety is also an area which merits exploration.

CSA CONCEPT EVALUATION (NON-MEMBERS)

Key Finding: There is considerable interest among target non-members – particularly younger adults. Fresh food and being local are the key motivators.

CSA CONCEPT EXPOSED TO TARGET CONSUMERS

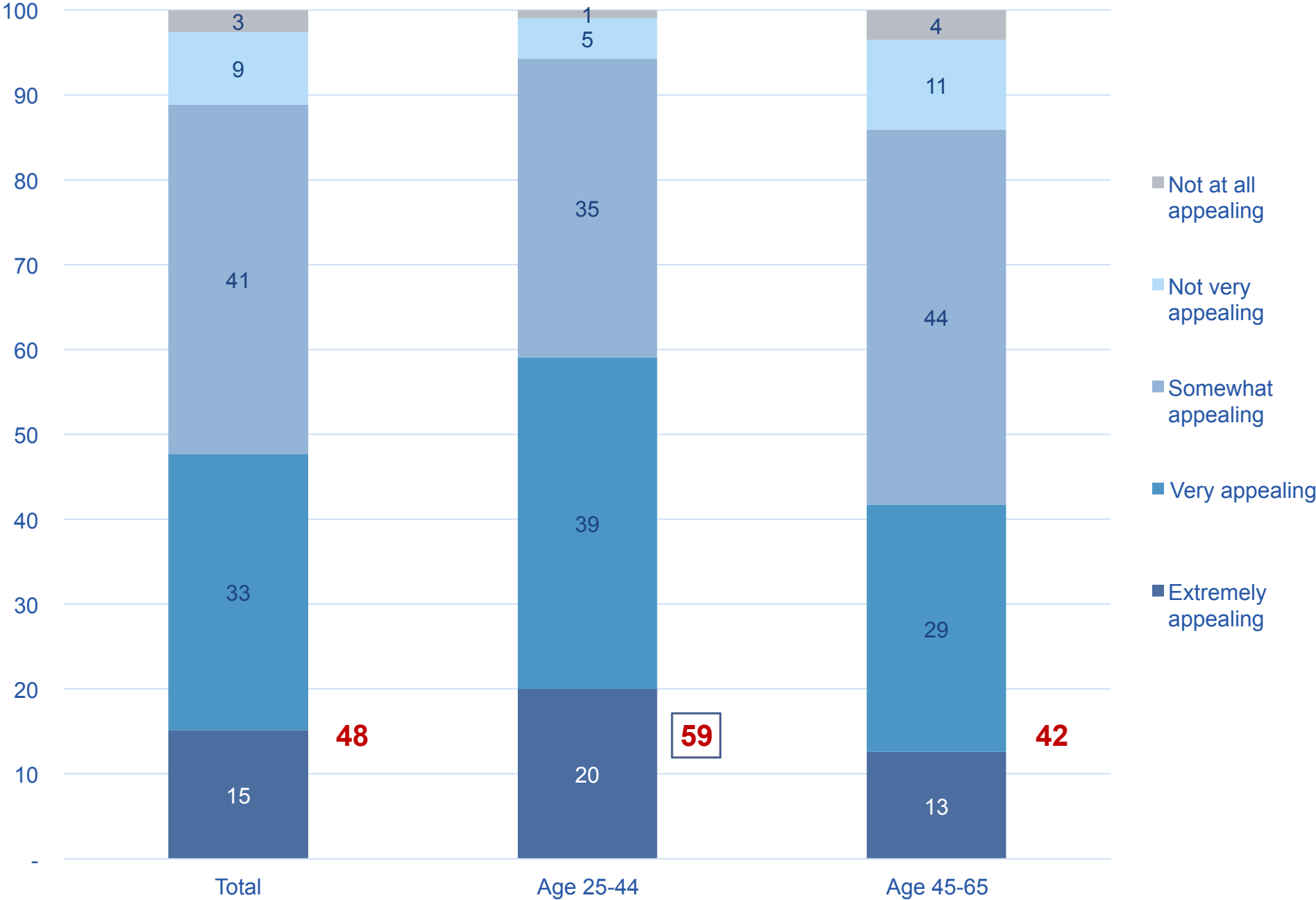
Community Supported Agriculture, CSA for short, is a system that connects farmers more closely to consumers by allowing people to subscribe to the harvest of a certain farm or group of farms. In return for subscribing to a harvest, members receive either a weekly or bi-weekly box of produce or other farm goods that are selected by the farmer based on what is in season. CSA members pay up front to purchase a “share” of a farm’s seasonal harvest, which provides cash flow for the farm to purchase things like seeds and equipment when it is most needed. Typically, farmers try to build a relationship with their subscribers by sending weekly letters of what is happening on the farm, inviting them to participate in harvesting crops, or holding open-farm events like tours and dinners.

CSA members receive a regular selection of freshly harvested food, picking up their shares at the farm itself or at another designated location like a farmers market, shop, school, church, or workplace. Shares can include vegetables, fruit, meat, flowers, herbs, grains, eggs, dairy, or a combination of all and come in various sizes and frequencies to suit different households and schedules. Prices vary accordingly, but compare favorably pound for pound with farmers markets and grocery stores. CSA members benefit from enjoying the freshest possible food at the height of the season and studies show that they adopt healthier eating habits than non-members.

CONCEPT APPEAL

48% of target consumers, including 59% of 25 – 44 year olds, found the CSA concept to be extremely or very appealing.

88% found it to be at least somewhat appealing.



Base: Total Non-Members (n=304)
12. How appealing do you find the program described in this description?

CONCEPT
DECONSTRUCTION:
MOST APPEALING
WORDS & PHRASES

The idea of being “fresh” most drove concept appeal.

The phrase “freshly harvested” was most often selected as appealing, while “freshest possible food” was often selected.

Other appealing words/phrases include “healthier eating habits”, and “vegetables, fruit”.

Community Supported Agriculture, CSA for short, is a system that connects farmers more closely to consumers by allowing people to subscribe to the harvest of a certain farm or group of farms. In return for subscribing to a harvest, members receive either a weekly or bi-weekly box of produce or other farm goods that are selected by the farmer based on what is in season. CSA members pay up front to purchase a “share” of a farm’s seasonal harvest, which provides cash flow for the farm to purchase things like seeds and equipment when it is most needed. Typically, farmers try to build a relationship with their subscribers by sending weekly letters of what is happening on the farm, inviting them to participate in harvesting crops, or holding open-farm events like tours and dinners. CSA members receive a regular selection of **freshly harvested food**, picking up their shares at the farm itself or at another designated location like a farmers market, shop, school, church, or workplace. Shares can include **vegetables, fruit, meat, flowers, herbs, grains, eggs, dairy**, or a combination of all and come in various sizes and frequencies to suit different households and schedules. Prices vary accordingly, but **compare favorably** pound for pound with farmers markets and grocery stores. CSA members benefit from enjoying the **freshest possible food** at the height of the season and studies show that they adopt **healthier eating habits** than non-members.

Legend:



Base: Total Non-Members (n=304)

13. Please highlight the specific words, if any, contained within the description below that you find appealing. Do this by using your mouse to highlight words that stand out. Feel free to mix and match – you do not have to pick all words from within the same sentence.

CONCEPT
DECONSTRUCTION:
MOST APPEALING
WORDS & PHRASES

Cost-focused language was most unappealing to consumers.

This includes “pay up front” and “prices vary accordingly”.

“Pickup up their shares” and “selected by the farmer” were selected by fewer consumers.

Community Supported Agriculture, CSA for short, is a system that connects farmers more closely to consumers by allowing people to **subscribe** to the harvest of a certain farm or group of farms. In return for **subscribing** to a harvest, members receive either a weekly or **bi-weekly** box of produce or other farm goods that are **selected by the farmer** based on what is in season.

CSA members **pay up front** to purchase a “share” of a farm’s seasonal harvest, which provides cash flow for the farm to purchase things like seeds and equipment when it is most needed. Typically, farmers try to build a relationship with their subscribers by sending weekly letters of what is happening on the farm, inviting them to **participate in harvesting crops**, or holding open-farm events like tours and dinners. CSA members receive a regular selection of freshly harvested food, **picking up their shares at the farm** itself or at another designated location like a farmers market, shop, school, church, or workplace. Shares can include vegetables, fruit, meat, **flowers**, herbs, grains, eggs, dairy, or a combination of all and come in various sizes and frequencies to suit different households and schedules. **Prices vary accordingly**, but compare favorably pound for pound with farmers markets and grocery stores. CSA members benefit from enjoying the freshest possible food at the height of the season and studies show that they adopt healthier eating habits than non-members.

Legend:



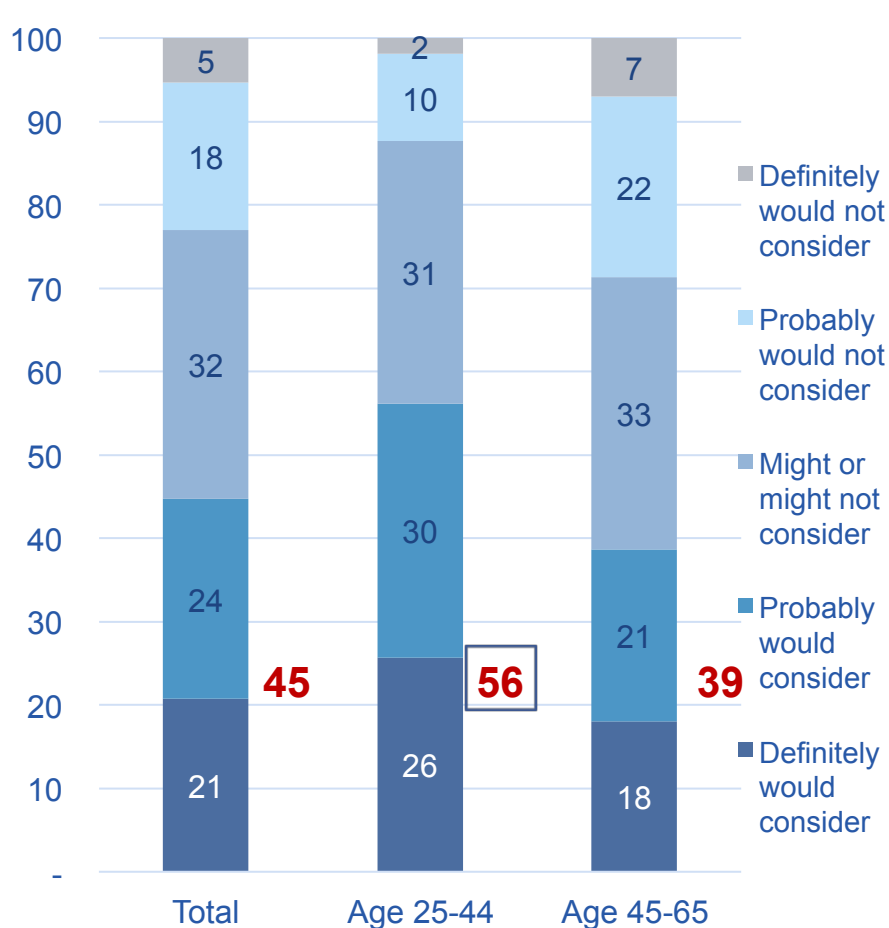
Base: Total Non-Members (n=304)

14. Now please highlight the specific words, if any, contained within the description below that you do not find appealing. Do this by using your mouse to highlight words that stand out. Feel free to mix and match – you do not have to pick all words from sentence.

CONCEPT MOTIVATION

Based on the description, 45% of target consumers would consider purchasing a CSA share. Consideration is significantly higher among the younger age segment.

Product freshness is the main reason for consideration, while helping local businesses/community is also a driver for consideration.



	Total
Total Definitely/Probably Would Consider	(136)
	%
<u>Positive (grand net)</u>	<u>75</u>
<u>Food/Produce (net)</u>	<u>49</u>
<u>Food/Produce Quality (subnet)</u>	<u>46</u>
Fresh food/produce/ability to buy fresh food	36
Healthier food/produce	8
<u>Good For Local Community (net)</u>	<u>29</u>
Helps/supports local farmers/businesses	16
Helps/good for the local community	7
Local/local produce/locally grown	7
<u>Miscellaneous Positive Mentions</u>	
Want to try it/would give it a try	7
Good/great/wonderful/like/love/appealing/interesting/ good product (unspecified)	6
Easy/efficient/convenient	6
Fair/comparable prices	5
<u>Neutral (grand net)</u>	<u>22</u>
<u>Need More Information (net)</u>	<u>17</u>
Need to know/depends on price/might be expensive	13

“It would be a pleasure to be able to eat fresh produce, dairy etc. on a regular basis. Probably healthier too and would be supporting local businesses/farms”

“It would be convenient for my family and a great way to try different kinds of produce than I would normally buy in the grocery store.”

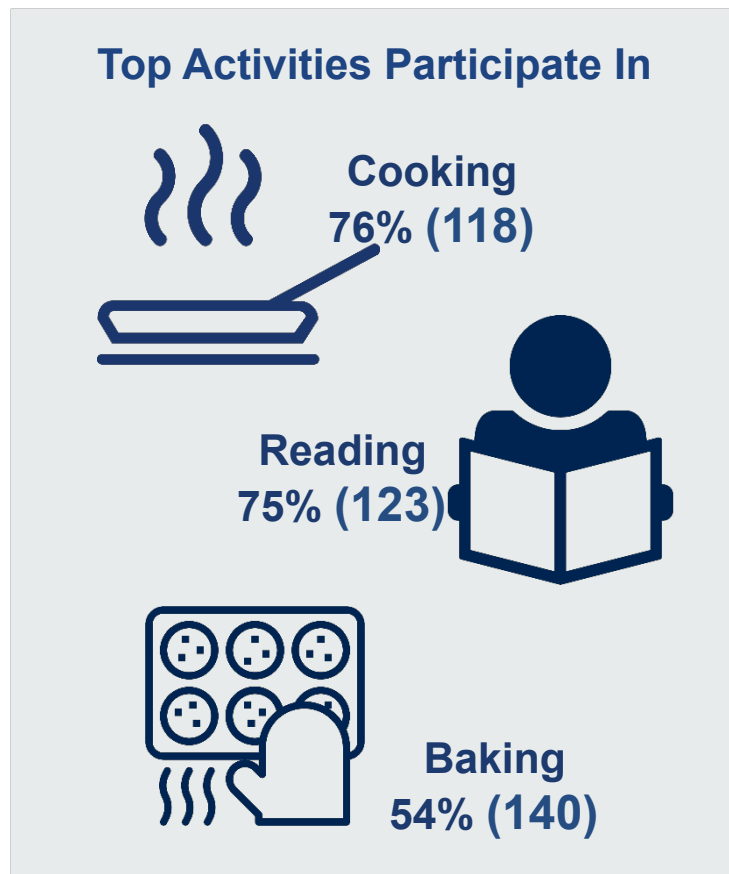
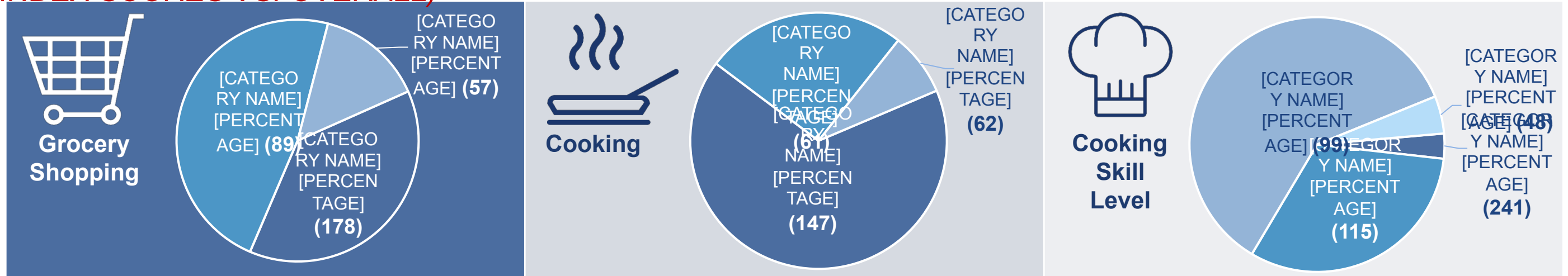
“I like that the produce would be fresh and straight to the farm. I also like that I would know exactly which farm it would come from.”

“It sounds like an interesting concept. I’d like to try it at least once to see if it would be something I’d like to do permanently.”

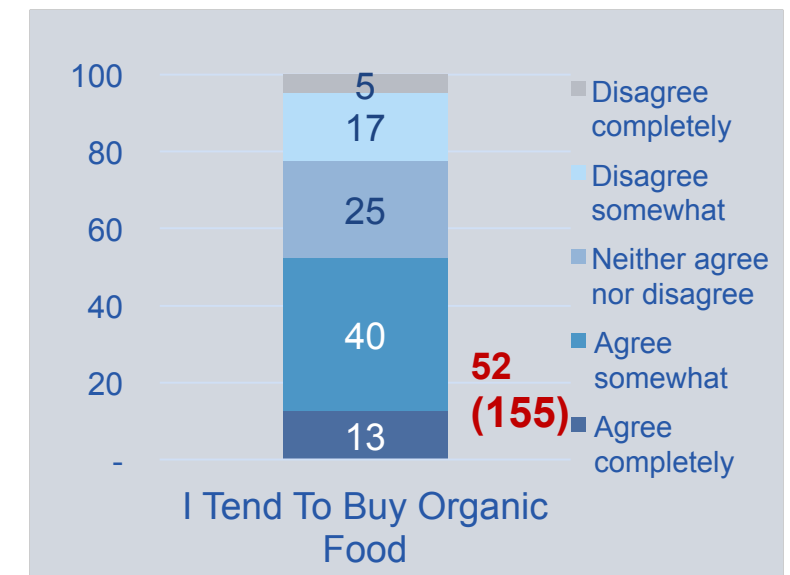
Base: Total Non-Members (n=304)
 15a. How likely would you be to consider purchasing a CSA share based on this description?
 15b. Why do you say that? Please be as specific as possible

BEHAVIORAL PROFILE: DEFINITELY WOULD CONSIDER CSA

(INDEX SCORES VS. OVERALL)



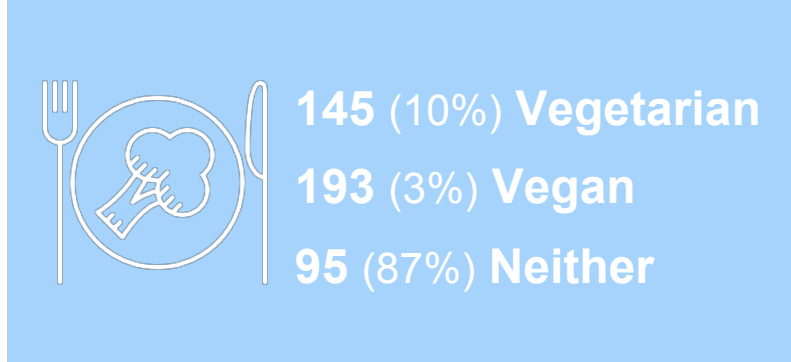
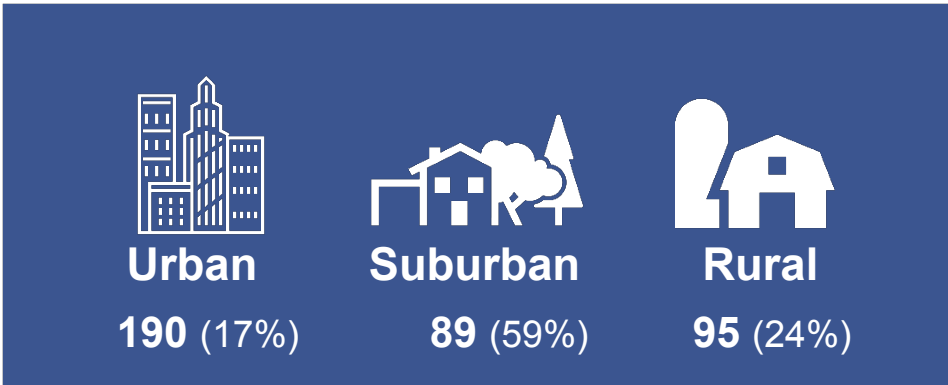
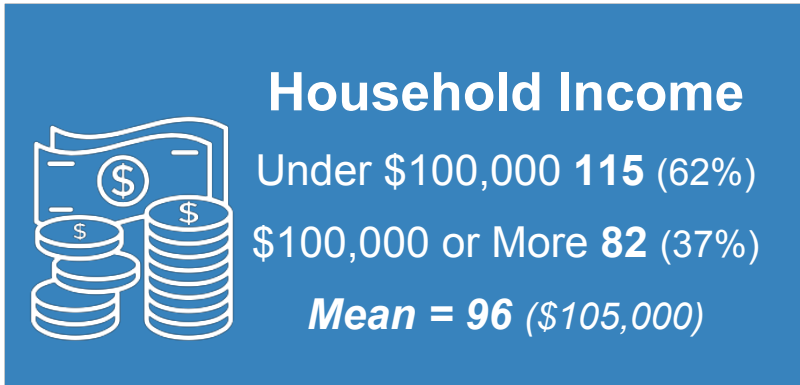
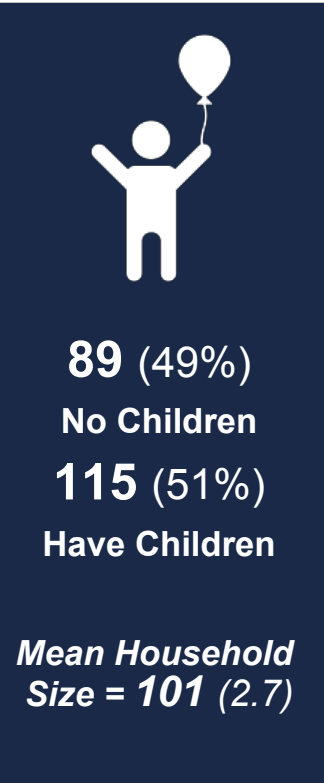
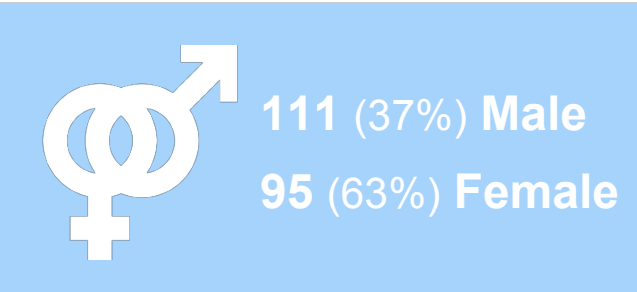
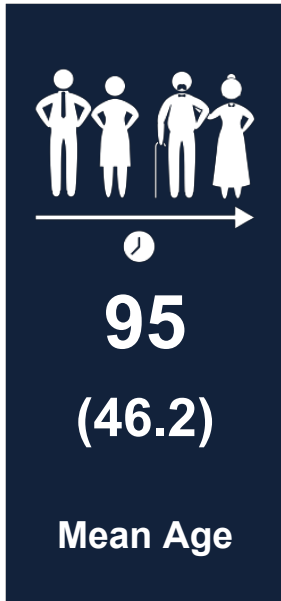
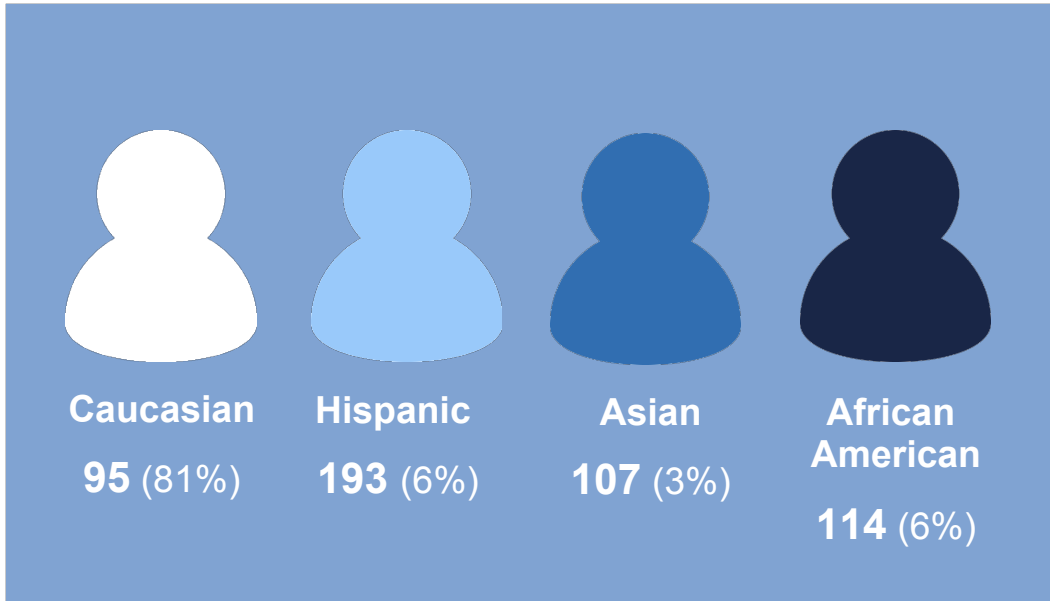
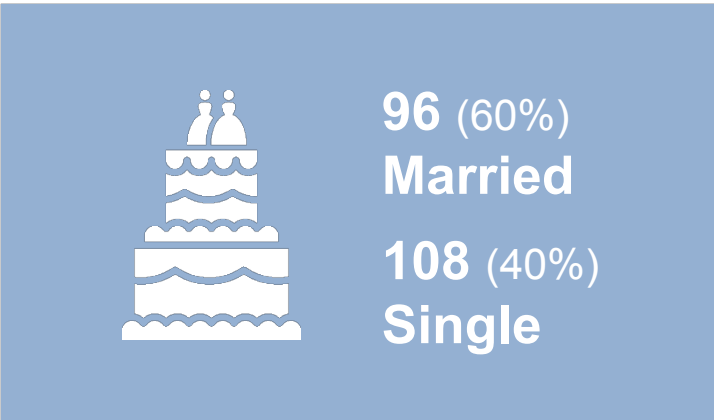
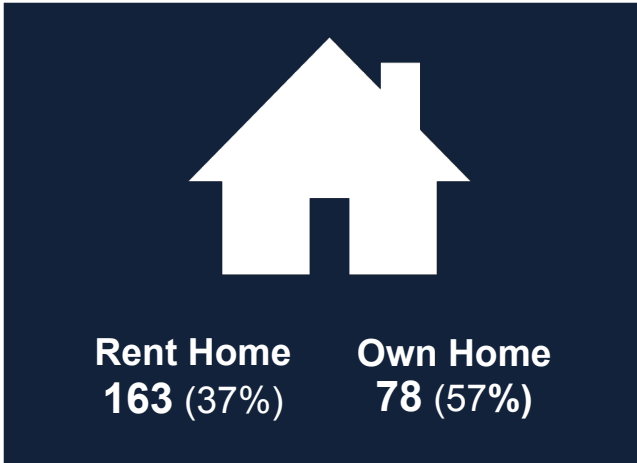
	Shop For Produce	INDEX
Total Def. Would Consider	(63)	
	%	
Shop Rite	25	80
Farmer's Markets	25	125
Stop & Shop	24	134
Hannaford	16	95
Price Chopper	16	103
Adams Fairacre Farms	16	103
Walmart	13	161
Trader Joes	13	227
Whole Foods	11	225
Aldi	10	126
Fairway	5	145
Local grocery stores	5	111
Costco	5	111
BJ's	3	74
Target	2	161



Average Weekly Grocery Spend

108 (\$153)

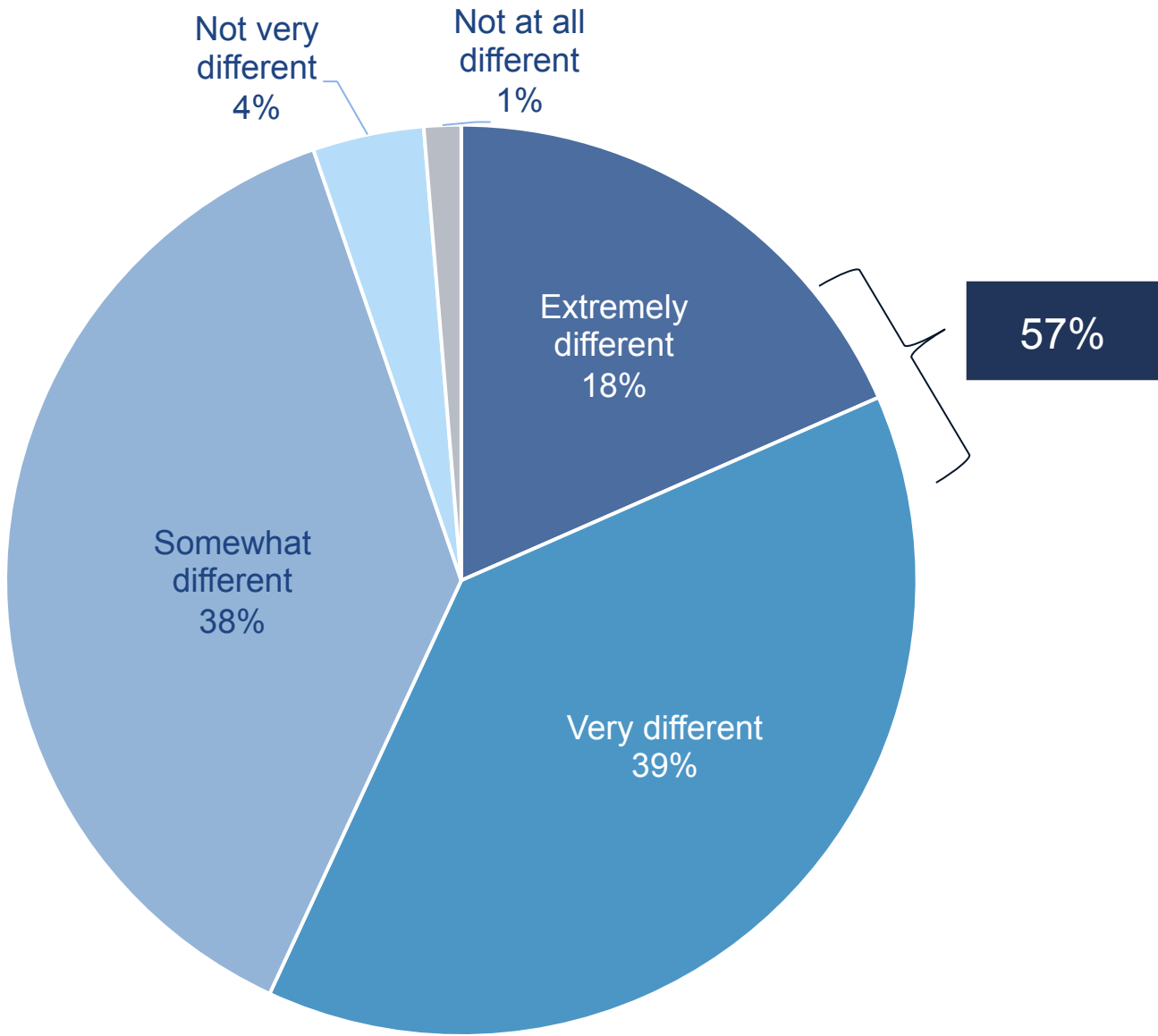
DEMOGRAPHICS: DEFINITELY WOULD CONSIDER CSA (INDEX SCORES VS. OVERALL)



CSA PROGRAM DIFFERENTIATION

CSA programs are viewed as a unique way to purchase fresh produce and other fresh foods.

Overall, 57% of target consumers see it as extremely or very different, and virtually all believe it's at least somewhat different.



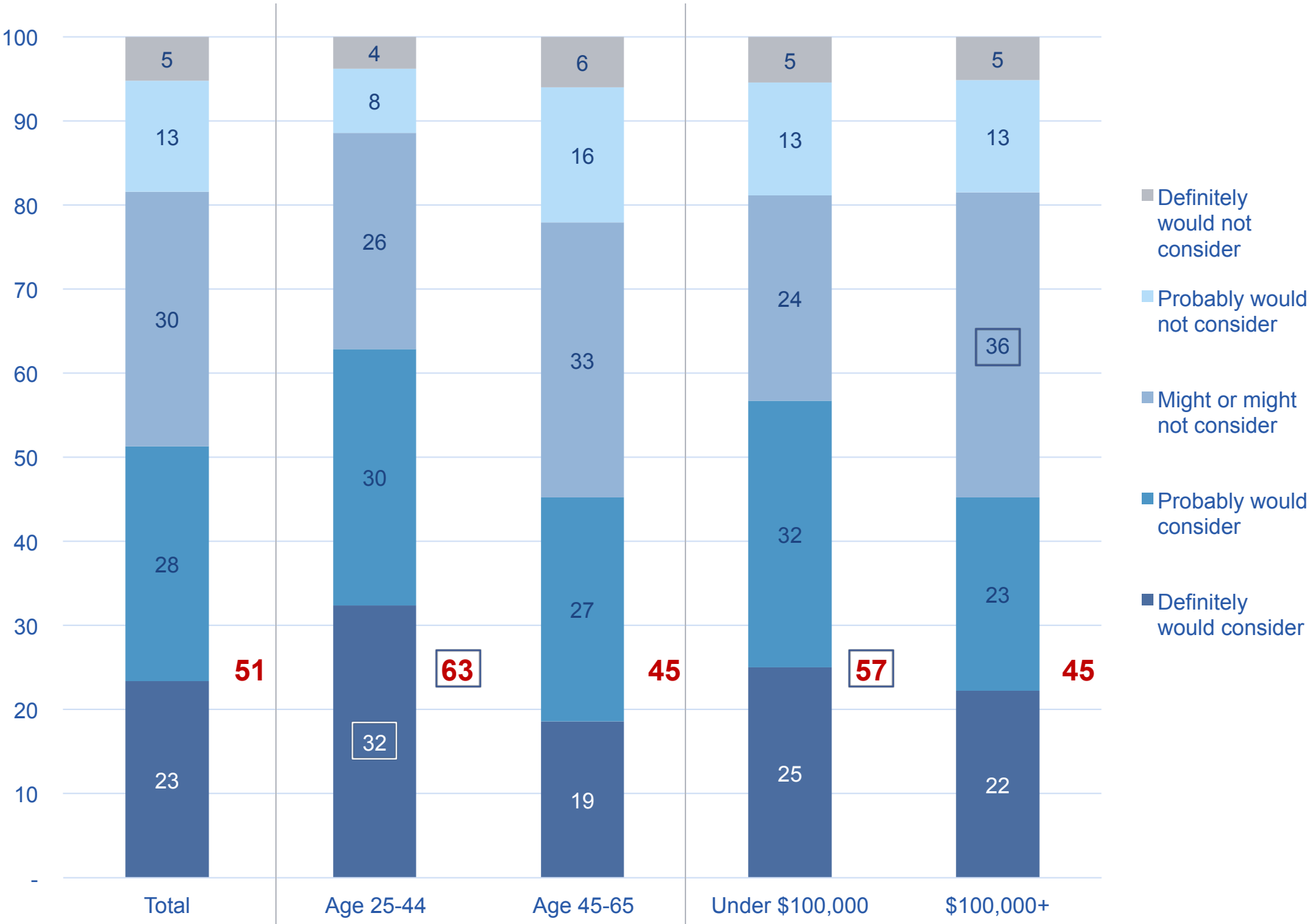
Base: Total Non-Members (n=304)

16a. Based on this description, how different do you find CSA programs compared to other ways of purchasing fresh produce and other fresh foods?

TRIAL MEMBERSHIP CONSIDERATION

51% of target consumers would be interested in a short-term trial membership – not much higher than overall consideration (45%).

This is driven by the younger age and lower income segments.



Base: Total Non-Members (n=304)

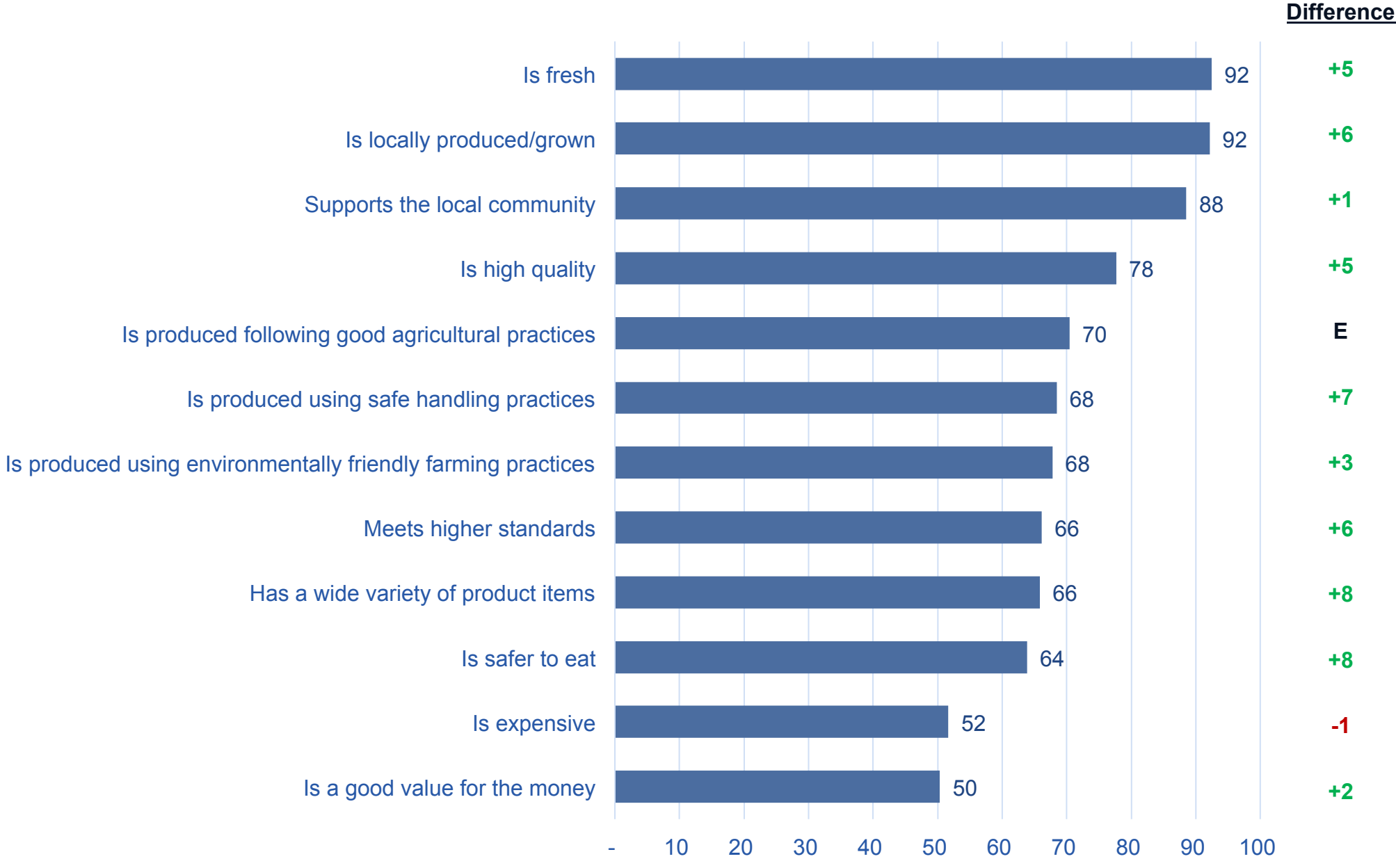
16b. How likely would you be to consider a short-term trial membership to a CSA if offered by a local farm?

CSA PERCEPTIONS: POST-CONCEPT EXPOSURE (AGREE COMPLETELY/SOMEWHAT)

Most statements experienced minor increases post-concept exposure.

Three attributes increased by 7% or more – they focused on variety and safety:

- Having a wide variety of product items (+8)
- Being safer to eat (+8)
- Being produced by safe handling practices (+7)



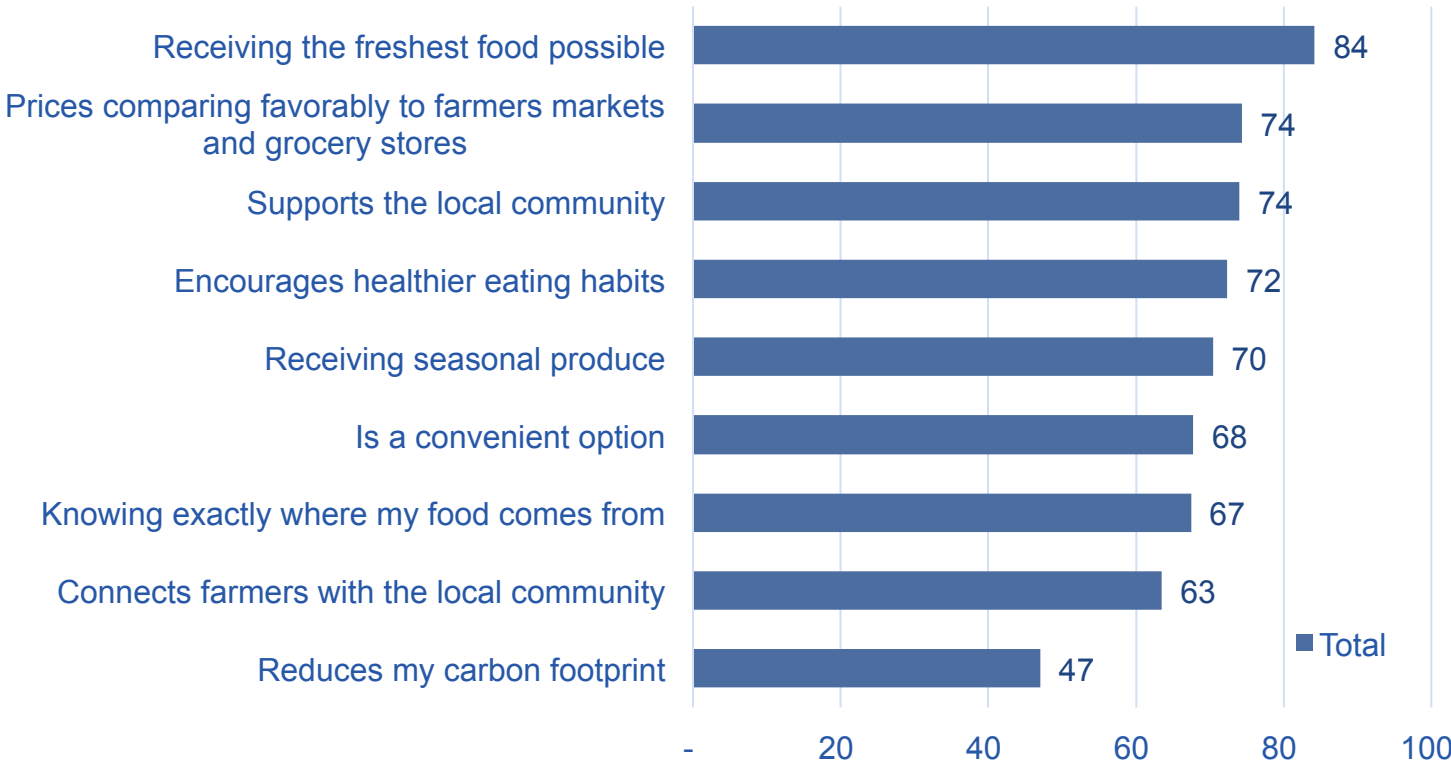
Base: Total Non-Members (n=304)

17. And based on the description, how much do you agree or disagree that each of the following describes the food you would receive from a CSA program?

CSA PROGRAM FEATURE IMPORTANCE (EXTREMELY/VERY IMPORTANT)

Receiving the freshest food possible is the most widely important feature of CSA programs.

Pricing comparing favorably and encouraging healthier eating habits are particularly important to females, and supporting the local community is important to males.



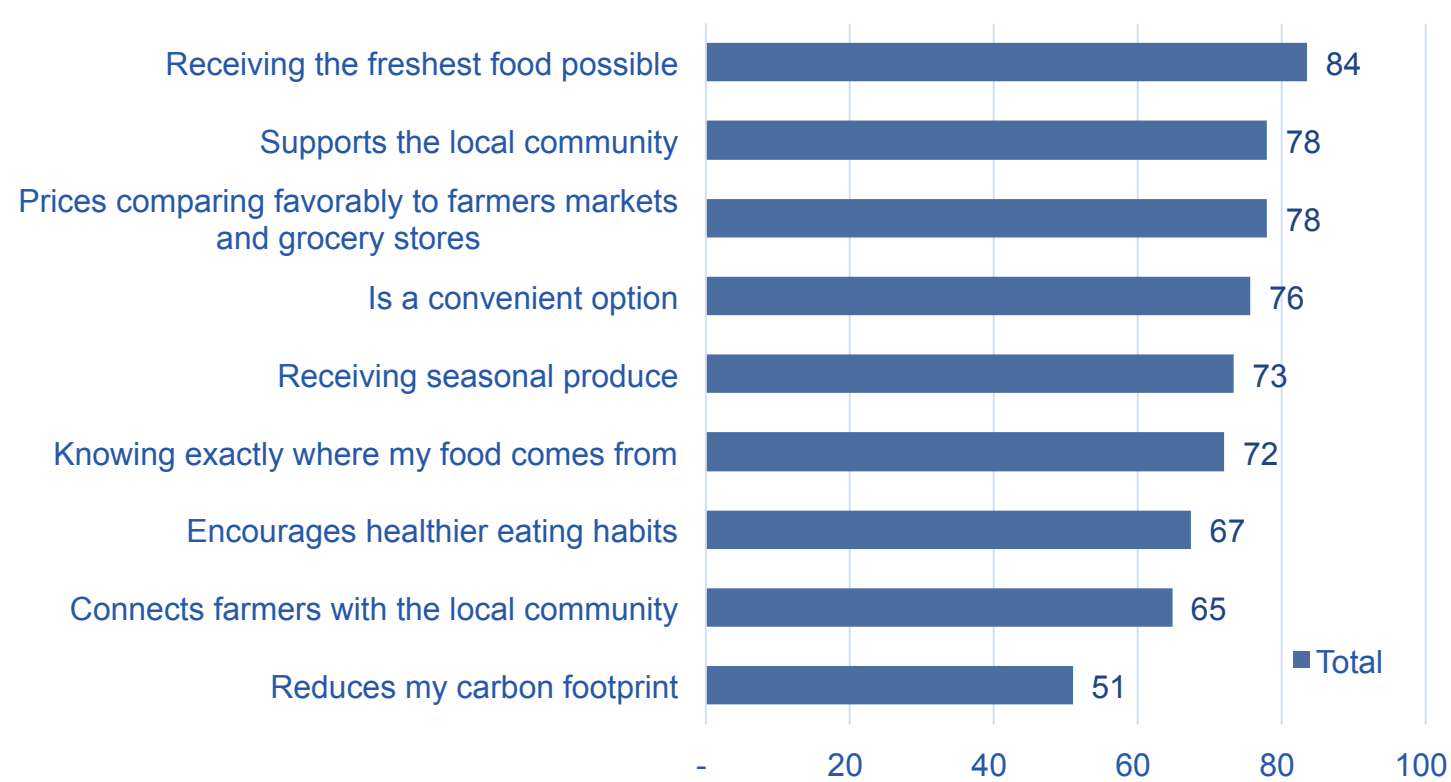
	Gender	
	Male	Female
Total Non-Members	(100)	(204)
	%	%
Receiving the freshest food possible	79	87
Prices comparing favorably to farmers markets and grocery stores	62	80
Supports the local community	71	75
Encourages healthier eating habits	59	79
Receiving seasonal produce	65	73
Is a convenient option	60	72
Knowing exactly where my food comes from	59	72
Connects farmers with the local community	57	67
Reduces my carbon footprint	45	48

Base: Total Non-Members (n=304)

18. How important do you consider each of the following features when thinking about a CSA program?

CSA FEATURE MOTIVATION
(MUCH/SOMEWHAT MORE LIKELY)

The freshest food possible, supporting the local community, favorable pricing, and convenience are the most motivating program features.



	Gender		Age	
	Male	Female	25-44	45-65
Total Non-Members	(100)	(204)	(105)	(199)
	%	%	%	%
Receiving the freshest food possible	80	85	90	80
Supports the local community	74	80	80	77
Prices comparing favorably to farmers markets and grocery stores	76	79	83	75
Is a convenient option	66	80	81	73
Receiving seasonal produce	66	77	75	72
Knowing exactly where my food comes from	65	75	77	69
Encourages healthier eating habits	61	71	76	63
Connects farmers with the local community	59	68	67	64
Reduces my carbon footprint	52	50	50	52

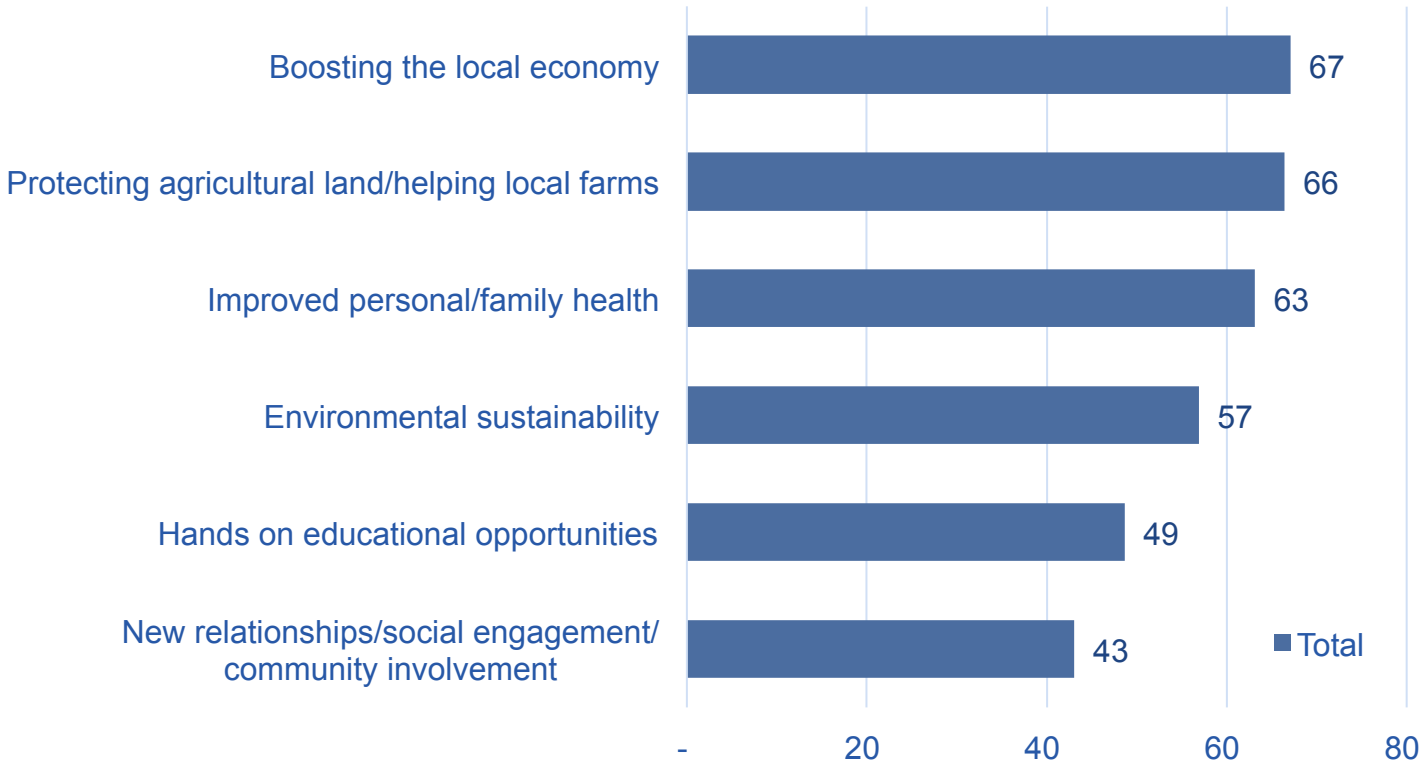
Base: Total Non-Members (n=304)

19. And, how likely would you be to consider purchasing a CSA share based on each of the following features?

CSA BENEFIT MOTIVATION
(DEFINITELY/PROBABLY WOULD CONSIDER)

The most resonant benefits of CSA were boosting the local economy and helping local farms.

Females and the younger age segment were significant more likely to consider CSAs based on improved personal/family health.



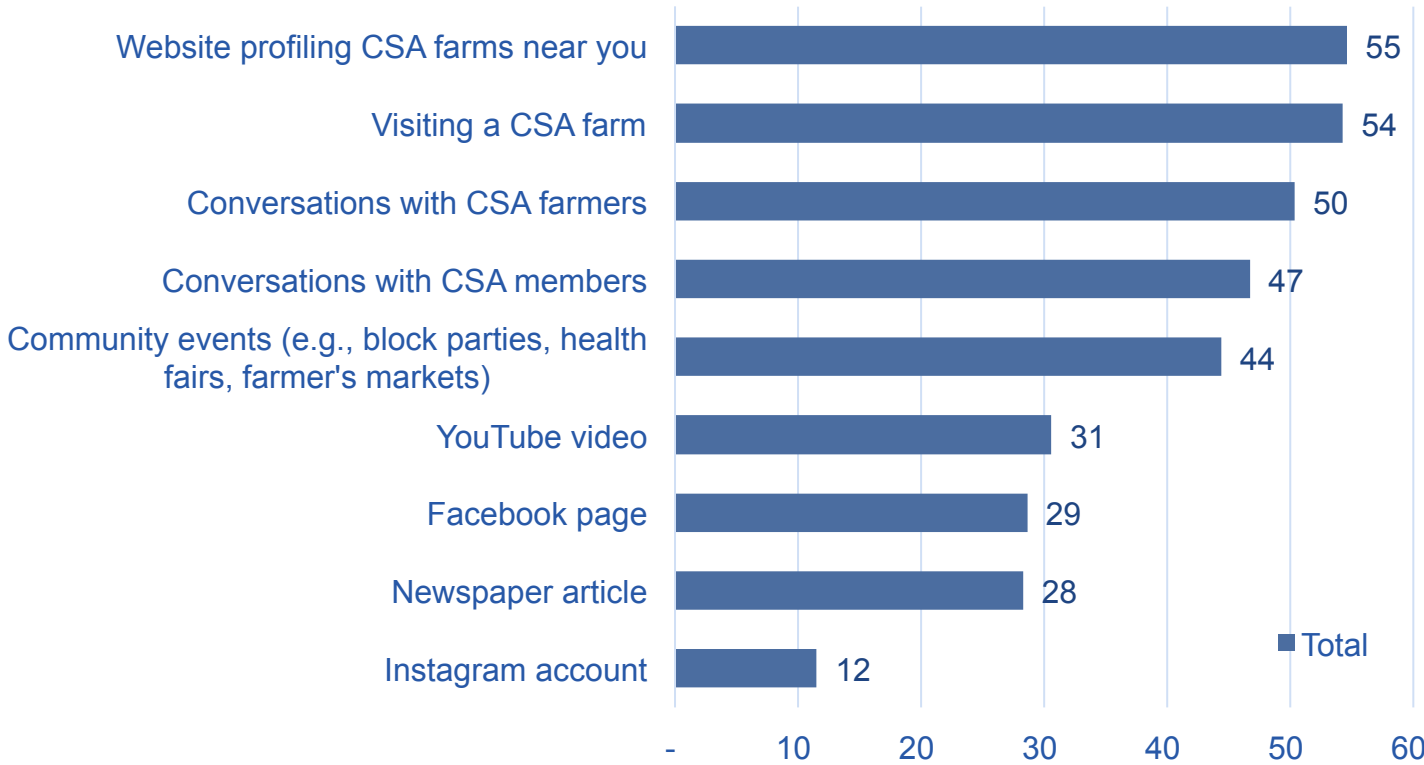
	Gender		Age	
	Male	Female	25-44	45-65
Total Non-Members	(100)	(204)	(105)	(199)
	%	%	%	%
Boosting the local economy	60	71	70	66
Protecting agricultural land/helping local farms	61	69	73	63
Improved personal/family health	55	67	75	57
Environmental sustainability	52	59	61	55
Hands on educational opportunities	38	54	54	46
New relationships/social engagement/community involvement	38	46	50	39

Base: Total Non-Members (n=304)
20. How likely would you be to consider purchasing a CSA share based on each of the following?

CSA INFORMATION SOURCE HELPFULNESS (EXTREMELY/VERY HELPFUL)

A majority of target consumers would find websites and farm visits helpful when learning more about CSAs. Conversations with farmers and members would also be widely helpful.

Younger adults have more interest in learning through social channels and community events.



	Age	
	25-44	45-65
Total Non-Members	(105)	(199)
	%	%
Website profiling CSA farms near you	56	54
Visiting a CSA farm	57	53
Conversations with CSA farmers	56	47
Conversations with CSA members	55	42
Community events (e.g., block parties, health fairs, farmer's markets)	53	40
YouTube video	42	25
Facebook page	36	25
Newspaper article	23	31
Instagram account	15	10

Base: Total Non-Members (n=304)

24. How helpful or unhelpful would each of the following sources be in learning more about CSA?

IMPLICATIONS: CSA CONCEPT EVALUATION

- There is considerable interest in CSA shares. Younger adults appear to provide the most opportunity.
- Focusing on quality and supporting the local economy are powerful motivators which can translate to membership.
- Though the most commonly shopped supermarket, Shop Rite customers are far less likely to be a target for CSA farms. Stop & Shop is the most widely shopped store which also over-indexes for coalition interest and can be a target for acquisition.

CSA PRICE PERCEPTIONS & IMPACT (NON-MEMBERS)

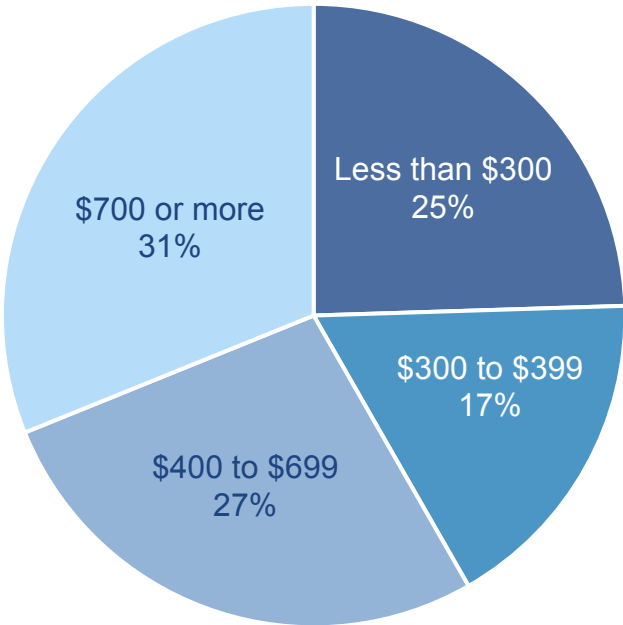
Key Finding: The current cost and payment structure is a barrier for non-members. A payment plan option would lessen this barrier and potentially lead to increased conversion rates.

CSA SHARE PRICE PERCEPTIONS

When thinking of a CSA share as an annual cost, on average target consumers believed it would be approximately \$650. However this ranged from one-quarter believing it would be under \$300 to three in ten thinking it would cost at least \$700.

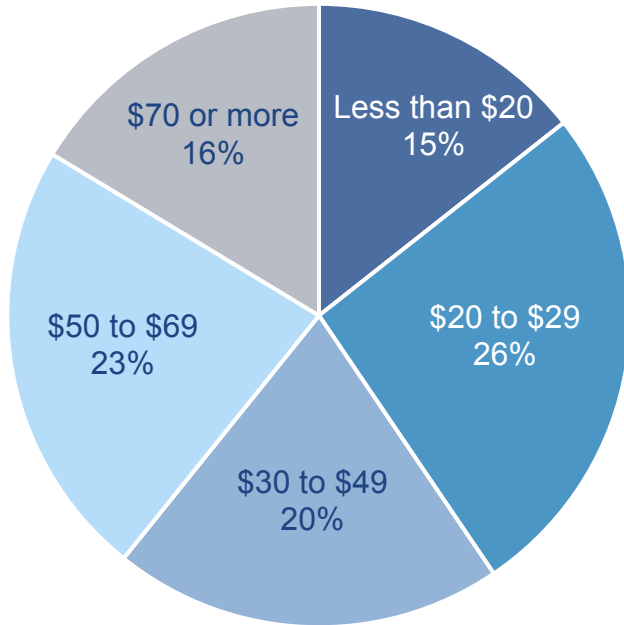
When asked for weekly cost perceptions, the average cited payment was \$46, which is nearly twice the estimated annual cost.

Annual Cost Of CSA Share For 6 Months



Mean = \$657 annual

Cost Of CSA Share Per Week



**Mean = \$46 per week
x 26 = \$1,196 annual**

Base: Base: Total Non-Members (n=304) (split sample)

21a. If your CSA share provided most or all of your fresh produce for 6 months of the year, what do you think would be the annual cost?

21b. If your CSA share provided most or all of your fresh produce, how much would you expect to pay for this program each week?

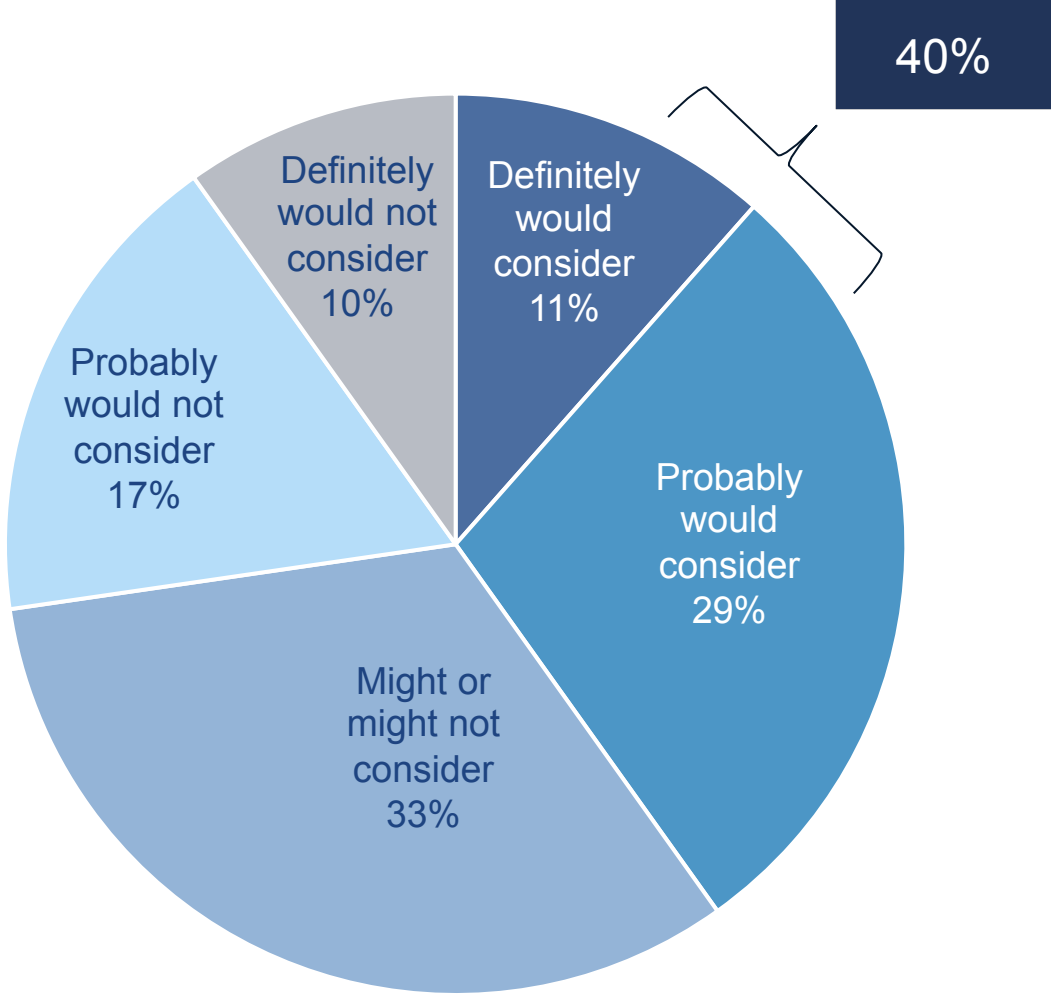
CSA CONSIDERATION: \$350 / \$700 PAYMENT DUE AT BEGINNING OF SEASON

With the average annual costs provided to consumers, two in five would consider a CSA share with payment due up front.

This includes 11% who definitely would consider a CSA share.

More than one-quarter would not consider a share with this cost/ payment structure.

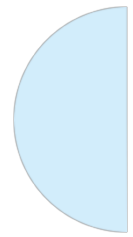
The average annual cost of a CSA share meant to feed a family of four is \$700. A half share, meant to feed a family of two, costs an average of \$350.



Base: Total Non-Members (n=304)

22. How likely would you be to consider a CSA share if payment were due at the beginning of the season?

PAYMENT OPTIONS EXPOSED IN STUDY



Standard payment – make one payment for the entire share prior to the growing season.



Payment plans – like a layaway program, allows you to pay for a CSA share in installments rather than all at once.



Debit account system – members pay upfront for a season of vegetables, and then choose what they want as the season goes on, drawing down on that initial credit.



Working shares – some farms allow members to pay for a portion or all of their share through “sweat equity” by working on the farm for a set period of time. The amount of time varies, but once a month is common.

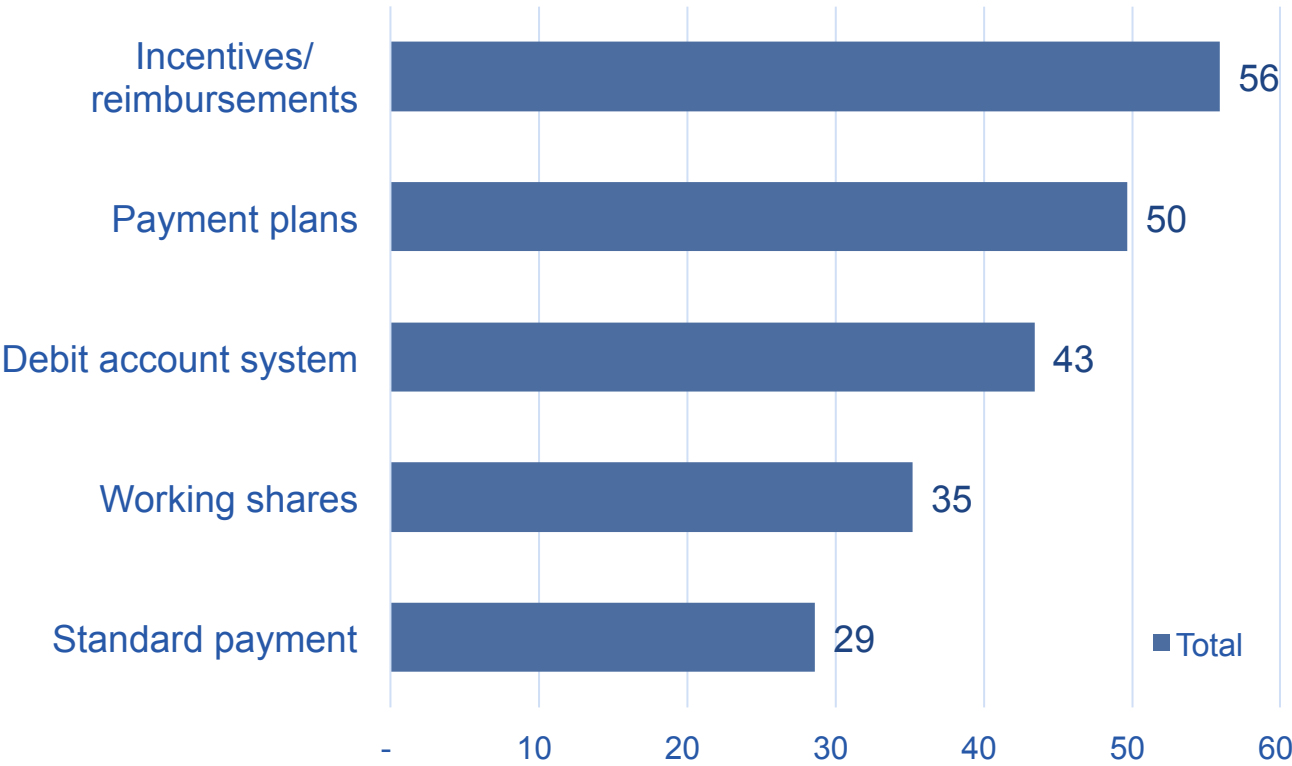


Incentives / reimbursements – in some places, health insurers and/or workplaces have offered reimbursements and cash incentives to encourage CSA membership as part of their health and wellness programs.

CSA PAYMENT OPTION CONSIDERATION (DEFINITELY/PROBABLY WOULD)

The current standard pre-payment plan is least likely to translate to conversion.

Incentives / reimbursements would result in a 56% of consumers to consider CSAs and 50% would consider based on payment plans. The younger and lower income segments are more likely to consider CSAs based on working shares and payment plans.



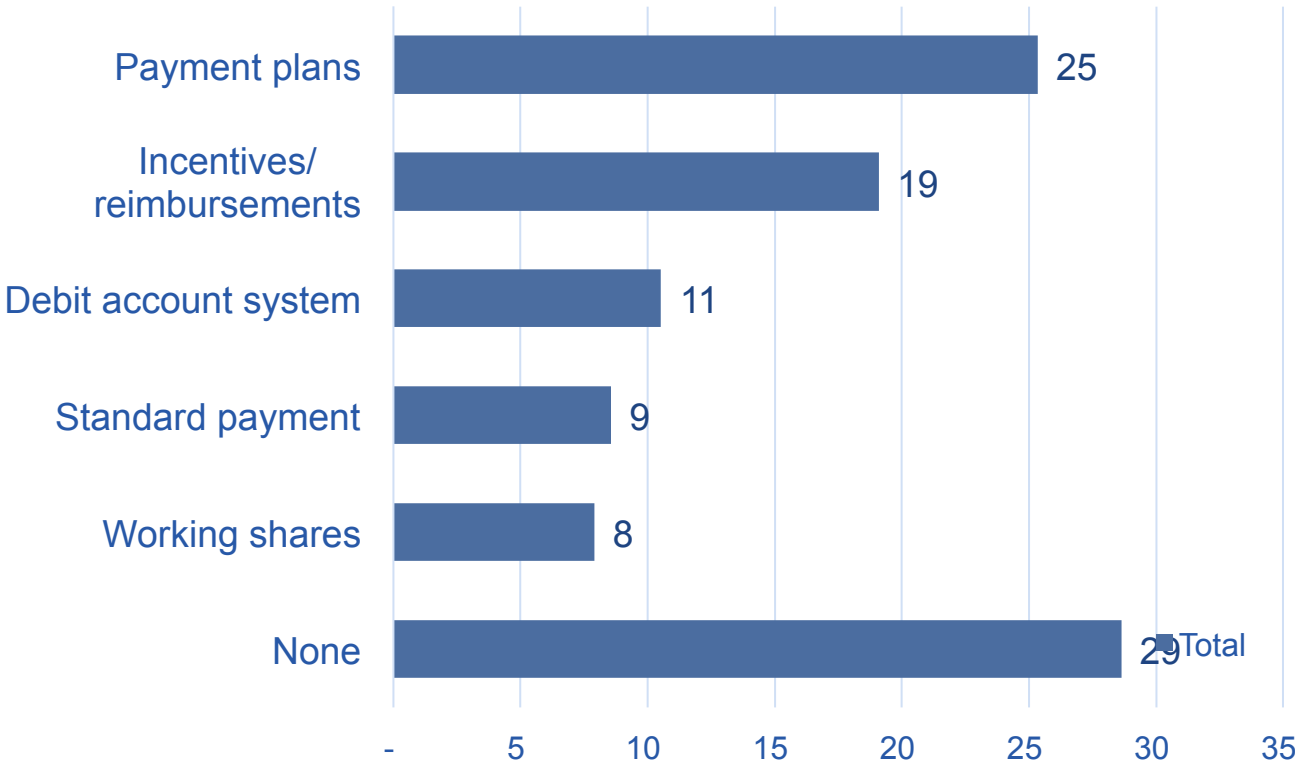
	Gender		Age		Household Income	
	Male	Female	25-44	45-65	Under \$100k	\$100k+
Total Non-Members	(100)	(204)	(105)	(199)	(164)	(135)
	%	%	%	%	%	%
Incentives/reimbursements	58	55	60	54	54	57
Payment plans	45	52	62	43	55	43
Debit account system	45	43	48	41	40	46
Working shares	38	34	43	31	42	27
Standard payment	40	23	30	28	25	33

Base: Total Non-Members (n=304)
23a. How likely would you be to consider purchasing a CSA share based on each of the following payment options?

MOST MOTIVATING PAYMENT OPTION

25% of target consumers would be most likely considering purchasing a CSA share using payment plans.

This was driven by females, younger, and lower income consumers.



	Gender		Age		Household Income	
	Male	Female	25-44	45-65	Under \$100k	\$100k+
Total Non-Members	(100)	(204)	(105)	(199)	(164)	(135)
	%	%	%	%	%	%
Payment plans	17	29	36	20	32	16
Incentives/reimbursements	21	18	14	22	17	21
Debit account system	11	10	10	11	9	13
Standard payment	13	6	8	9	6	12
Working shares	9	7	8	8	9	7
None	29	28	24	31	27	32

Base: Total Non-Members (n=304)
 23b. And which of the following options would make you most likely to consider a CSA program?

IMPLICATIONS: CSA PRICE PERCEPTIONS & IMPACT

- Communicating share pricing using a weekly cost may prove advantageous as many over-estimate the weekly spend.
- Payment plans appear to be a method to drive increased interest in CSA programs and should be considered when possible.

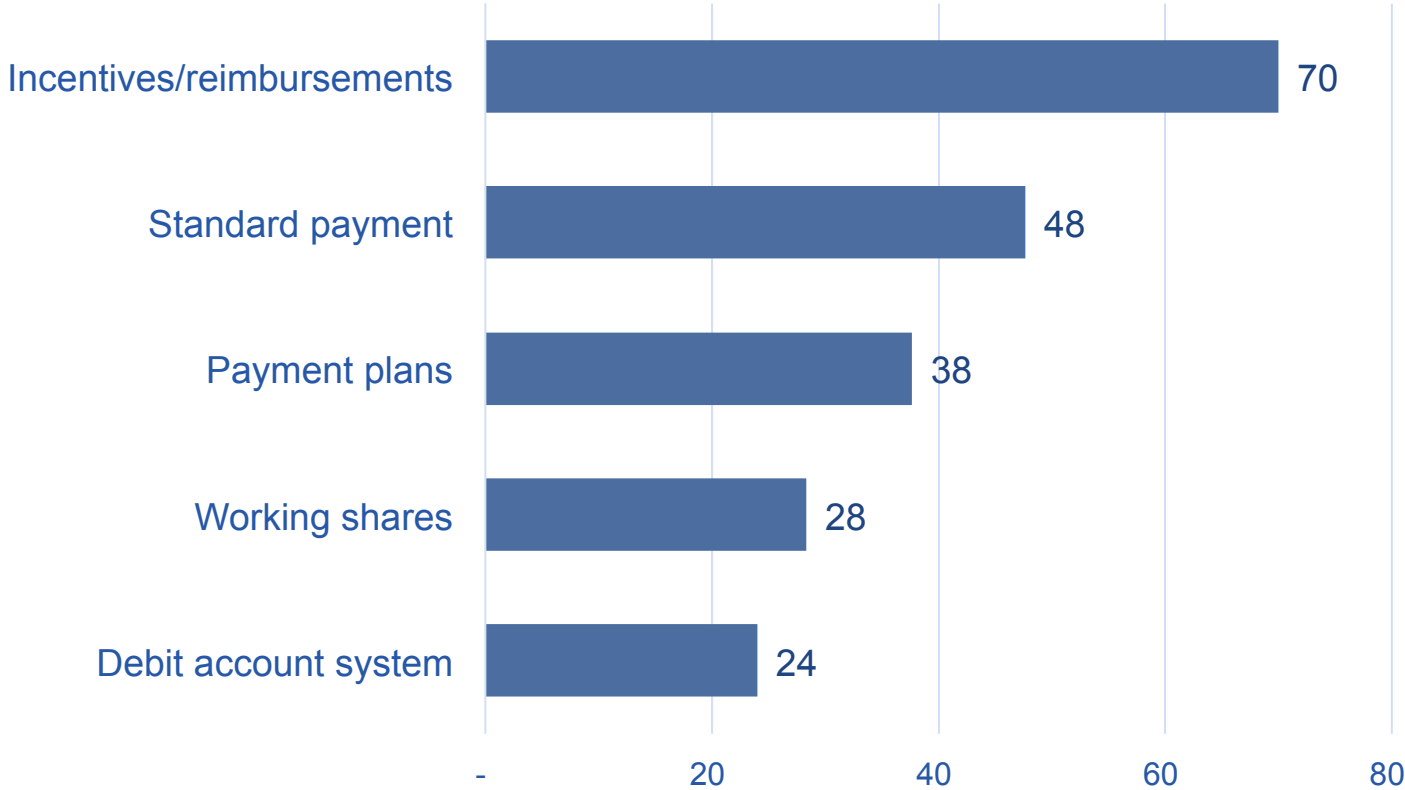
PAYMENT OPTIONS (MEMBERS)

Key Finding: The standard payment option is more appealing than payment plans for current members.

PAYMENT OPTION APPEAL (EXTREMELY/VERY APPEALING)

Seven in ten members find payment through incentives/reimbursements to be extremely or very appealing, far more than any other option. This was driven by Millennials – 83% of this segment found it appealing.

Standard payment was more widely appealing than payment plans, working shares and debit account systems.



	Gender		Age	
	Male	Female	18-39	40+
Total Members	(53)	(247)	(102)	(198)
	%	%	%	%
Incentives/reimbursements	66	71	83	63
Standard payment	51	47	50	46
Payment plans	34	38	47	33
Working shares	32	28	40	22
Debit account system	17	26	27	22

Base: Total Members (n=300)

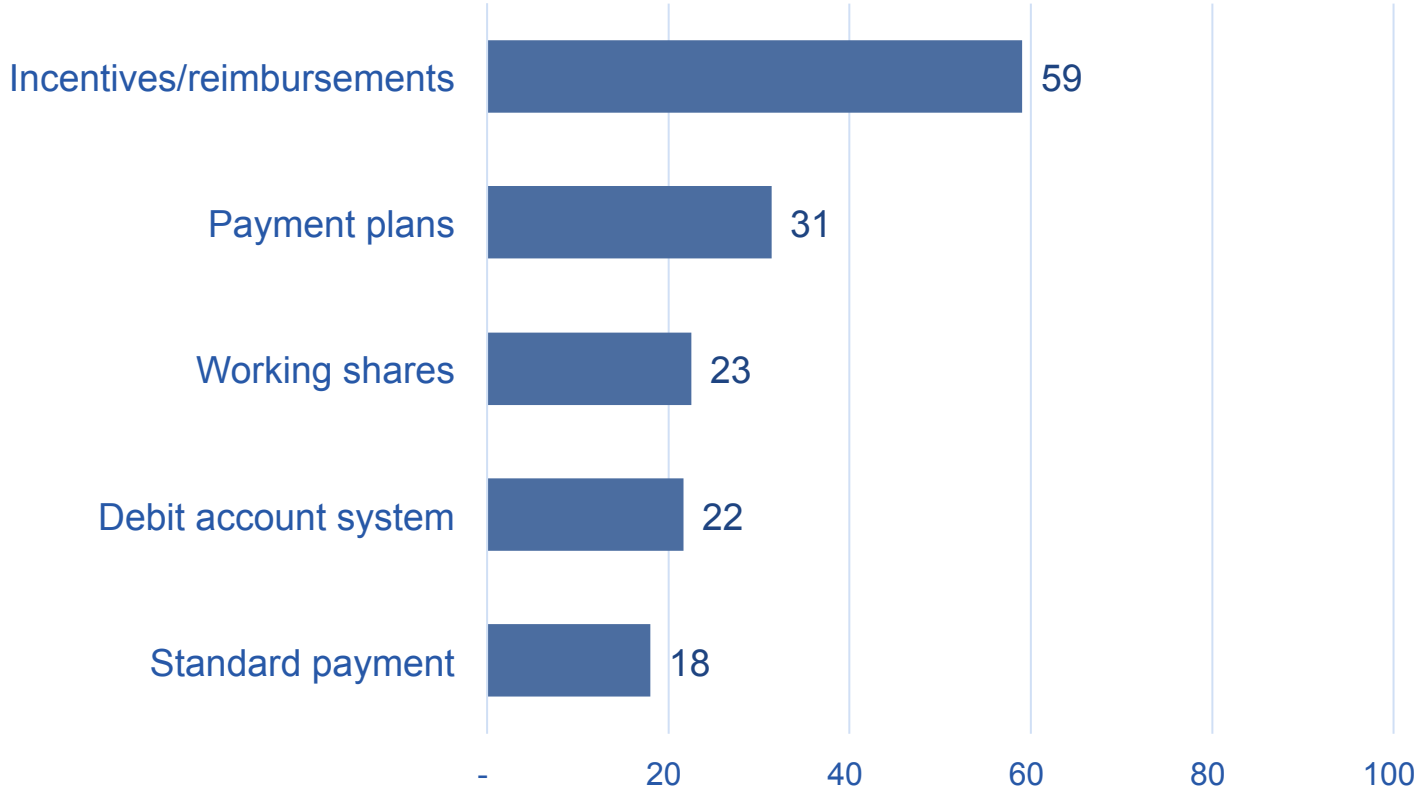
23. How appealing are each of the following payment options to you personally in a CSA share program?

PAYMENT OPTION CONSIDERATION

(MUCH/SOMEWHAT MORE LIKELY)

Compared to currently used payment option, 59% of members would consider using incentives/reimbursements 31% would be more likely to use payment plans.

Younger members are significantly more likely than older members to be more likely to use incentives, payment plans, and working shares.



	Age	
	18-39	40+
Total Members	(102)	(198)
	%	%
Incentives/reimbursements	71	53
Payment plans	40	27
Working shares	37	16
Debit account system	26	19
Standard payment	8	22

Base: Total Members (n=300)

25. And how likely would you be to use each of the following payment options if they were available in a CSA share program, compared to how you currently pay for the program?

IMPLICATIONS: PAYMENT OPTIONS

- Payment method is not as important a consideration among members.
- Additional payment options appear to be a “nice-to-have” though not a deciding factor in terms of remaining a member.
- However, payment plans have stronger appeal to younger members – those with the highest lifetime value.

QUESTIONS?

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ESOMAR
member

THANK YOU!