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

- **Rent Home**: 14%
- **Own Home**: 82%
- **Married**: 74%
- **Single**: 23%
- **Employed**: 74%
- **Not Employed**: 21%
- **Male**: 18%
- **Female**: 82%
- **No Children**: 50%
- **Have Children**: 50%
- **Mean Age**: 47.5
- **County**: Dutchess 32%, Ulster 22%, Westchester 18%, Putnam 14%, Columbia 1%, Greene 1%, Other 12%
- **Household Income**: Under $100,000 31%, $100,000 or More 50%, Mean = $127,800
- **Urban**: 12%
- **Suburban**: 52%
- **Rural**: 36%
- **Work in Food-Related Industry**: 8%
- **Some College or Less**: 7%
- **2 Year College or Greater**: 90%
- **15% Vegetarian, 3% Vegan, 82% Neither
NON-MEMBER PROFILE

- **Rent Home**: 22%
- **Own Home**: 74%
- **Married**: 63%
- **Single**: 37%
- **Employed**: 66%
- **Not Employed**: 34%
- **Male**: 33%
- **Female**: 67%
- **No Children**: 56%
- **Have Children**: 44%
- **Caucasian**: 86%
- **Hispanic**: 4%
- **Asian**: 3%
- **African American**: 6%
- **Mean Age**: 48.6
- **Household Income**: Over $100,000 44%
  - Mean = $109,000
- **Urban**: 9%
- **Suburban**: 66%
- **Rural**: 25%
- **Some College or Less**: 30%
- **2 Year College or Greater**: 70%
- **Vegetarian**: 7%
- **Vegan**: 2%
- **Neither**: 92%
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.
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

- Once a week do the bulk of the shopping, but shop for essentials as
- Shop for the whole week in one trip
- Pick up as you go... never know what is needed until it is needed
- Shop every day or two, especially for fresh items or produce
- Shop less often than once a week

Whether Shop At 1 Or Multiple Stores

- Total Members
  - Shop at one store: 34%
  - Shop at multiple stores: 66%

- Total Non-Members
  - Shop at one store: 51%
  - Shop at multiple stores: 49%

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.

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.

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

### GROCERY STORE BEHAVIOR: PAST 3 MONTH SHOPPING

<table>
<thead>
<tr>
<th>Grocery Store</th>
<th>Total Members (n=300)</th>
<th>Total Non-Members (n=304)</th>
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</thead>
<tbody>
<tr>
<td>Adams Fairacre Farms</td>
<td>51</td>
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<tr>
<td>Trader Joe's</td>
<td>39</td>
<td></td>
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<tr>
<td>Shop Rite</td>
<td>38</td>
<td></td>
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<tr>
<td>Stop &amp; Shop</td>
<td>38</td>
<td></td>
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<tr>
<td>Farmer's Markets</td>
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<tr>
<td>Hannaford</td>
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<tr>
<td>Whole Foods</td>
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<tr>
<td>Target</td>
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<tr>
<td>BJ's</td>
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<tr>
<td>Foodtown</td>
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<td>Walmart</td>
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<td>Local grocery stores</td>
<td>12</td>
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<tr>
<td>Costco</td>
<td>14</td>
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<tr>
<td>Aldi</td>
<td>11</td>
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<tr>
<td>Price Chopper</td>
<td>8</td>
<td></td>
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<tr>
<td>Stew Leonard's Food Stores</td>
<td>6</td>
<td></td>
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<tr>
<td>Fairway</td>
<td>10</td>
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</tbody>
</table>

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?
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.
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.
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.
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.

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<th>Gender</th>
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<td>Male</td>
<td>Female</td>
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<tr>
<td>Total Members</td>
<td>(53)</td>
<td>(247)</td>
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<tr>
<td>Farmer's Markets</td>
<td>34%</td>
<td>50%</td>
</tr>
<tr>
<td>Adams Fairacre Farms</td>
<td>58%</td>
<td>41%</td>
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<tr>
<td>Shop Rite</td>
<td>13%</td>
<td>22%</td>
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<tr>
<td>Stop &amp; Shop</td>
<td>17%</td>
<td>19%</td>
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<tr>
<td>Whole Foods</td>
<td>17%</td>
<td>18%</td>
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<tr>
<td>Trader Joes</td>
<td>8%</td>
<td>20%</td>
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<tr>
<td>Hannaford</td>
<td>13%</td>
<td>17%</td>
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<tr>
<td>Foodtown</td>
<td>6%</td>
<td>10%</td>
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<tr>
<td>Local grocery stores</td>
<td>15%</td>
<td>7%</td>
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<tr>
<td>BJ’s</td>
<td>4%</td>
<td>8%</td>
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<tr>
<td>Fairway</td>
<td>4%</td>
<td>6%</td>
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<tr>
<td>Aldi</td>
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<td>6%</td>
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<tr>
<td>Costco</td>
<td>2%</td>
<td>5%</td>
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<tr>
<td>Stew Leonard's Food Stores</td>
<td>6%</td>
<td>4%</td>
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<tr>
<td>Mother Earth's</td>
<td>4%</td>
<td>4%</td>
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<tr>
<td>Price Chopper</td>
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<td>Target</td>
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<td>3%</td>
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<tr>
<td>Walmart</td>
<td>4%</td>
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<tr>
<td>DiCicco’s</td>
<td>4%</td>
<td>2%</td>
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<tr>
<td>Tops</td>
<td>4%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

### CSA PERCEPTIONS (AGREE COMPLETELY/SOMEWHAT)

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

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<tr>
<th>Gender</th>
<th>Age</th>
<th>Household Income</th>
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<tbody>
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<td></td>
<td>Male</td>
<td>Female</td>
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<tr>
<td>Total Non-Members</td>
<td>(100)</td>
<td>(204)</td>
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<tr>
<td>Is fresh</td>
<td>%</td>
<td>%</td>
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<td>Supports the local community</td>
<td>85</td>
<td>88</td>
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<tr>
<td>Is locally produced/grown</td>
<td>80</td>
<td>89</td>
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<tr>
<td>Is high quality</td>
<td>69</td>
<td>74</td>
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<tr>
<td>Is produced following good agricultural practices</td>
<td>68</td>
<td>72</td>
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<tr>
<td>Is produced using environmentally friendly farming practices</td>
<td>60</td>
<td>67</td>
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<tr>
<td>Is produced using safe handling practices</td>
<td>58</td>
<td>63</td>
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<tr>
<td>Meets higher standards</td>
<td>58</td>
<td>61</td>
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<tr>
<td>Has a wide variety of product items</td>
<td>51</td>
<td>61</td>
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<tr>
<td>Is safer to eat</td>
<td>51</td>
<td>58</td>
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<tr>
<td>Is expensive</td>
<td>51</td>
<td>53</td>
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<tr>
<td>Is a good value for the money</td>
<td>45</td>
<td>50</td>
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</table>

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.
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.
### CSA SHARE PROGRAM LIKES

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Members</th>
<th>Food/Product Attributes (net)</th>
<th>Local/locally grown</th>
<th>Experience (net)</th>
<th>Try New Things (subnet)</th>
<th>Socialization (subnet)</th>
<th>Relationship with farmers/forming a bond with the farmers</th>
<th>Pick Your Own (subnet)</th>
<th>U-pick opportunities/pick your own (unspecified)</th>
<th>Miscellaneous Experience Mentions</th>
<th>Local Support (net)</th>
<th>Supporting local farms/farmers/supporting farms/farmers</th>
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<tbody>
<tr>
<td>Total Members</td>
<td>(300)</td>
<td>81</td>
<td>19</td>
<td>59</td>
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<td>Food/Product Attributes (net)</td>
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<td>Fresh (subnet)</td>
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<td>Fresh produce/fresh fruits/fresh vegetables</td>
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<td>Selection (subnet)</td>
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<td>Variety/variety of food (unspecified)</td>
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<td>Seasonal food/eating with the seasons</td>
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<td>Organic produce/organic fruits/organic vegetables</td>
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<td>Miscellaneous Food/Product Attributes Mentions</td>
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<td>Try New Things (subnet)</td>
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<td>Trying new produce/trying new fruits/trying new vegetables</td>
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<td>Relationship with farmers/forming a bond with the farmers</td>
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<td>Pick Your Own (subnet)</td>
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<td>U-pick opportunities/pick your own (unspecified)</td>
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<tr>
<td>Sense of community/lovely community feeling/building a connection with my community</td>
<td></td>
<td>12</td>
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<td>Supporting local farms/farmers/supporting farms/farmers</td>
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</tbody>
</table>

**Base:** Total Members (n=300)

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

**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.**

**RUSSELL RESEARCH**

---

**HUDSON VALLEY CSA COALITION**

- "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 it 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."
- "Supporting local farmers and sustainability. Feeding my family fresh organic food. Meeting the farmers."
- "Knowing that the food is fresh from the farm and organically grown and that I am supporting the farm and the farmers."
- "The variety of food and excitement of trying new food. Eating in season. Eating organic."
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.
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.
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.
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)

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.

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.

Base: Total Members (n=300)

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?
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.
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)
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.
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.
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.
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:

Least Selected

Most Selected

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.
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 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.

<table>
<thead>
<tr>
<th>Definitely/Probably Would Consider</th>
<th>Total Definitely/Probably Would Consider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive (grand net)</td>
<td>%</td>
</tr>
<tr>
<td>Food/Produce (net)</td>
<td>75</td>
</tr>
<tr>
<td>Food/Produce Quality (subnet)</td>
<td>49</td>
</tr>
<tr>
<td>Fresh food/produce/ability to buy fresh food</td>
<td>46</td>
</tr>
<tr>
<td>Healthier food/produce</td>
<td>8</td>
</tr>
<tr>
<td>Good For Local Community (net)</td>
<td>29</td>
</tr>
<tr>
<td>Helps/supports local farmers/businesses</td>
<td>16</td>
</tr>
<tr>
<td>Helps/good for the local community</td>
<td>7</td>
</tr>
<tr>
<td>Local/local produce/locally grown</td>
<td>7</td>
</tr>
<tr>
<td>Miscellaneous Positive Mentions</td>
<td>5</td>
</tr>
<tr>
<td>Want to try it/would give it a try</td>
<td>7</td>
</tr>
<tr>
<td>Good/great/wonderful/like/love/appealing/interesting/good product (unspecified)</td>
<td>6</td>
</tr>
<tr>
<td>Easy/efficient/convenient</td>
<td>6</td>
</tr>
<tr>
<td>Fair/comparable prices</td>
<td>10</td>
</tr>
<tr>
<td>Neutral (grand net)</td>
<td>22</td>
</tr>
<tr>
<td>Need More Information (net)</td>
<td>17</td>
</tr>
<tr>
<td>Need to know/depends on price/might be expensive</td>
<td>13</td>
</tr>
</tbody>
</table>

“*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.*"
**BEHAVIORAL PROFILE: DEFINITELY WOULD CONSIDER CSA (INDEX SCORES VS. OVERALL)**

### Grocery Shopping

**[CATEGOR Y NAME] [PERCENTAGE]**

- Shop For Produce
- Shop Rite (25%)
- Farmer's Markets (25%)
- Stop & Shop (24%)
- Hannaford (16%)
- Price Chopper (16%)
- Adams Fairacre Farms (16%)
- Walmart (13%)
- Trader Joes (13%)
- Whole Joes (11%)
- Aldi (10%)
- Fairway (5%)
- Local grocery stores (5%)
- Costco (5%)
- BJ's (3%)
- Target (2%)

**INDEX**

- Total Def. Would Consider (63)
- Shop Rite 80
- Farmer's Markets 125
- Stop & Shop 134
- Hannaford 95
- Price Chopper 103
- Adams Fairacre Farms 103
- Walmart 161
- Trader Joes 227
- Whole Joes 225
- Aldi 126
- Fairway 145
- Local grocery stores 111
- Costco 111
- BJ's 74
- Target 161

### Cooking

**[CATEGOR Y NAME] [PERCENTAGE]**

- Top Activities Participate In
- Cooking (76%)
- Reading (75%)
- Baking (54%)

**INDEX**

- I Tend To Buy Organic Food
  - Disagree completely (5)
  - Disagree somewhat (25)
  - Neither agree nor disagree (40)
  - Agree somewhat (52)
  - Agree completely (13)

### Average Weekly Grocery Spend

**108 ($153)**

**Base:** Total Definitely Would Consider CSA Membership (n=63)
**DEMOGRAPHICS: DEFINITELY WOULD CONSIDER CSA**  
*(INDEX SCORES VS. OVERALL)*

- **Married:** 96 (60%)
- **Single:** 108 (40%)

**Household Income**
- Under $100,000: 115 (62%)
- $100,000 or More: 82 (37%)
- **Mean = 96 ($105,000)**

**Mean Household Size = 101 (2.7)**

- Employed: 107 (79%)
- Not Employed: 79 (21%)

- Caucasian: 95 (81%)
- Hispanic: 193 (6%)
- Asian: 107 (3%)
- African American: 114 (6%)

- Male: 111 (37%)
- Female: 95 (63%)
- No Children: 89 (49%)
- Have Children: 115 (51%)

- Urban: 190 (17%)
- Suburban: 89 (59%)
- Rural: 95 (24%)

- 2 Year College or Greater: 100 (70%)
- Some College or Less: 100 (30%)

- 145 (10%) Vegetarian
- 193 (3%) Vegan
- 95 (87%) Neither
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.
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.
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.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Total Non-Members</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving the freshest food possible</td>
<td>(100)</td>
<td>79%</td>
<td>87%</td>
</tr>
<tr>
<td>Prices comparing favorably to farmers markets and grocery stores</td>
<td></td>
<td>74%</td>
<td>80%</td>
</tr>
<tr>
<td>Supports the local community</td>
<td></td>
<td>74%</td>
<td>75%</td>
</tr>
<tr>
<td>Encourages healthier eating habits</td>
<td></td>
<td>72%</td>
<td>79%</td>
</tr>
<tr>
<td>Receiving seasonal produce</td>
<td></td>
<td>70%</td>
<td>73%</td>
</tr>
<tr>
<td>Is a convenient option</td>
<td></td>
<td>68%</td>
<td>72%</td>
</tr>
<tr>
<td>Knowing exactly where my food comes from</td>
<td></td>
<td>67%</td>
<td>72%</td>
</tr>
<tr>
<td>Connects farmers with the local community</td>
<td></td>
<td>63%</td>
<td>67%</td>
</tr>
<tr>
<td>Reduces my carbon footprint</td>
<td></td>
<td>47%</td>
<td>48%</td>
</tr>
</tbody>
</table>

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.

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

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?
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.
 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.

<table>
<thead>
<tr>
<th>Source</th>
<th>25-44</th>
<th>45-65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website profiling CSA farms near you</td>
<td>56%</td>
<td>54%</td>
</tr>
<tr>
<td>Visiting a CSA farm</td>
<td>57%</td>
<td>53%</td>
</tr>
<tr>
<td>Conversations with CSA farmers</td>
<td>56%</td>
<td>47%</td>
</tr>
<tr>
<td>Conversations with CSA members</td>
<td>55%</td>
<td>42%</td>
</tr>
<tr>
<td>Community events (e.g., block parties, health fairs, farmer's markets)</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>YouTube video</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Facebook page</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Newspaper article</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Instagram account</td>
<td>12%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base: Total Non-Members (n=304)
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.
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.
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 though “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.

<table>
<thead>
<tr>
<th>Incentives/reimbursements</th>
<th>Payment plans</th>
<th>Debit account system</th>
<th>Working shares</th>
<th>Standard payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>56</td>
<td>50</td>
<td>43</td>
<td>35</td>
<td>29</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Incentives/reimbursements</th>
<th>Payment plans</th>
<th>Debit account system</th>
<th>Working shares</th>
<th>Standard payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male (100)</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>Female (204)</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>25-44 (105)</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>45-65 (199)</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>Under $100k (164)</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>$100k+ (135)</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
</tbody>
</table>

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.
IMPLICATIONS: CSA PRICE PERCEPTIONS & IMPACT

• Communicating share pricing using a **weekly cost** may prove advantageous as many overestimate 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.
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.

<table>
<thead>
<tr>
<th>Payment Option</th>
<th>Age</th>
<th>18-39</th>
<th>40+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incentives/reimbursements</td>
<td>Total Members</td>
<td>(102)</td>
<td>(198)</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>%</td>
<td></td>
</tr>
<tr>
<td>Payment plans</td>
<td>59%</td>
<td>71%</td>
<td>53%</td>
</tr>
<tr>
<td>Working shares</td>
<td>31%</td>
<td>40%</td>
<td>27%</td>
</tr>
<tr>
<td>Debit account system</td>
<td>23%</td>
<td>37%</td>
<td>16%</td>
</tr>
<tr>
<td>Standard payment</td>
<td>22%</td>
<td>26%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>18%</td>
<td>8%</td>
<td>22%</td>
</tr>
</tbody>
</table>

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?
THANK YOU!