Waldo Fresh CSA Survey Summary Report

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Introduction

Community Supported Agriculture (CSA) is a popular way for consumers to buy seasonal food directly from a local farmer. Typically, a farmer offers "shares" of the farm's produce for purchase, a share consists of a certain amount of vegetables, but other farm products may be included. Interested consumers who purchase a share (also known as a "membership" or a "subscription") receive the seasonal produce each week throughout the farming season.

Waldo Fresh, a project of Waldo General Hospital and the HOMEtowns Partnership project, conducted a survey to assess the use of and interest in CSA among residents in Waldo County, Maine. Other survey topics included the importance of various factors when purchasing food, recall of Waldo Fresh advertising, interest in farm or market shares, and reasons preventing residents from purchasing a CSA or farm share.

Methods

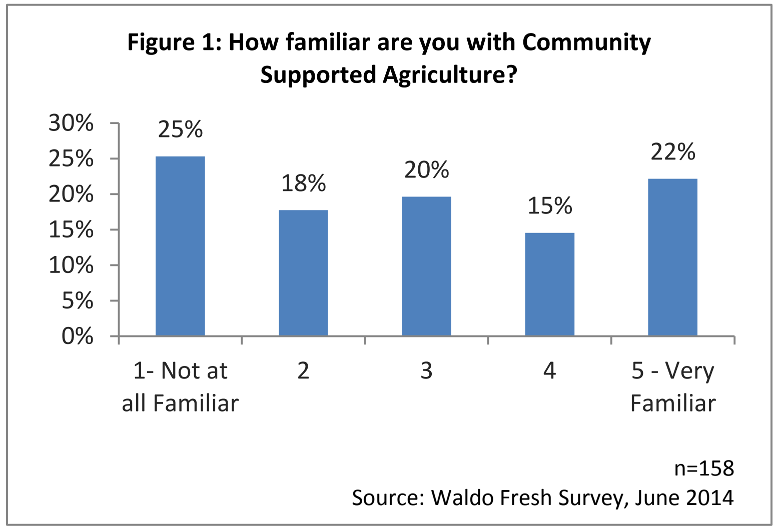
The CSA consumer survey was an online survey developed collaboratively by staff at Waldo General Hospital, MaineHealth, Hart Consulting, and Market Decisions. The survey was initially administered to residents of Waldo County in a two-step process. First residents received a postcard invitation to take the survey, then they accessed the survey via the weblink. The web survey took approximately 10 minutes to complete.

A random sample of 2,000 household addresses in Waldo County, Maine was developed using information available from the U.S Postal Service. Market Decisions sent a postcard to these addresses explaining the purpose of the survey, how to complete it online, and who to contact if they wanted more information about the survey. In addition, Waldo Fresh staff distributed 200 postcards at farmers' markets and other community events. The initial response to the survey invitation was low, so the survey was converted to a phone survey and residents were called at home and invited to answer the questions with a telephone interviewer.

Data collection ran from May 3rd to May 30th, 2014. A total of 158 surveys were completed, 113 by phone and 45 online. The final response rate for this survey was 7.9%. The margin of error for this survey is +/-7.8% at 95% confidence.

Findings

Residents in Waldo county have varying levels of familiarity with the CSA concept. A greater percentage of respondents had no familiarity (43%) compared to those with some familiarity (37%). One-quarter (25%) were not at all familiar with CSA, but a similar amount (22%) said that they were very familiar.



About one-quarter (26%) of respondents said that they have purchased a CSA in the past, while only 33% said they would be somewhat or very interested in purchasing a CSA in the future. When asked why they would or would not be interested in purchasing a CSA in the future, the most common reasons were that they do their own gardening or know someone who does (31%), they are concerned about the cost (11%), or that the CSA provides more food than they can use.

The most common reasons provided among those interested in purchasing a CSA in the future are that they generally support or have a CSA (12%), and that they want to support local farmers (11%).

Table 1: What are the reasons you are/are not interested in purchasing a CSA in the future?

Negative Responses (Will Not Purchase)

	% n=109
Does own gardening, gets produce from friends and relatives	31%
Concerned about cost	11%
CSA provides more food than I would find useful	11%
Don't know enough about CSA	7%
Prefer to shop myself, want to pick out own foods	7%
CSA doesn't seem useful to me (general negative)	3%
Not a priority, haven't thought about it	3%
CSA provides lower quality food	1%

Multiple responses allowed

Positive Responses (Will Purchase)

	% n=48
General support, already have a CSA	12%
Want to support local farmers	11%
Want more fresh, seasonal foods, high quality foods	8%
Easier than growing own	1%

Multiple responses allowed

Important Attributes When Purchasing Food

Respondents were asked a number of questions about their priorities when purchasing food in order to gauge what they consider most valuable and appealing. A one-to-five scale was used to determine importance, where one meant "not important" and five meant "very important." "Freshness and Quality" was given the highest priority by respondents, with 95% rating it as important. This was followed by "supporting your local economy" (89%) and "that it is grown locally" (84%). Notably, both of those factors were rated higher than variety, cost and convenience, so is clear that respondents in this survey think local foods and supporting the local economy are important .

Table 2: How important is the following to you when purchasing food? n=158

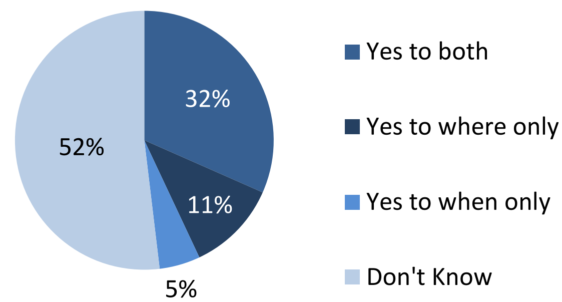
	1 - Not at all Important	**2**	**3**	**4**	**5 - Very Important**	**% Important**
Freshness and quality	1%	1%	4%	18%	77%	**95%**
Supporting your local economy	1%	2%	8%	28%	61%	**89%**
That it is locally grown	3%	3%	10%	30%	54%	**84%**
Have a variety of food to choose from	2%	2%	15%	35%	47%	**82%**
Cost	4%	5%	22%	23%	45%	**68%**
Convenience	3%	9%	25%	26%	37%	**63%**
That it is organic	10%	9%	22%	19%	39%	**58%**
Dietary/allergic concerns	20%	20%	19%	12%	28%	**40%**

At the bottom of the list, only 40% of respondents reported that dietary and allergic concerns were important to their food purchases. While food being designated as organic is considered very important to a sizable group of respondents (39%), it is also the only area other than dietary and allergic concerns to have more than 10% of respondents claiming it is not important to them at all: 19% reported that being organic is not at all important.

Additional Barriers to CSA Adoption

While large numbers of respondents report a definite interest in purchasing local foods and supporting their local economy with their food purchases, fewer actually choose to purchase a CSA. When asked if they knew where to purchase a CSA share and when to purchase a CSA share, only 32% of respondents answered yes to both questions. Without knowing both pieces of information, individuals are unlikely to be able to purchase a CSA. Additionally, only 11% of respondents were aware that some banks offer CSA savings accounts which could help them budget the relatively large up-front costs of a CSA.

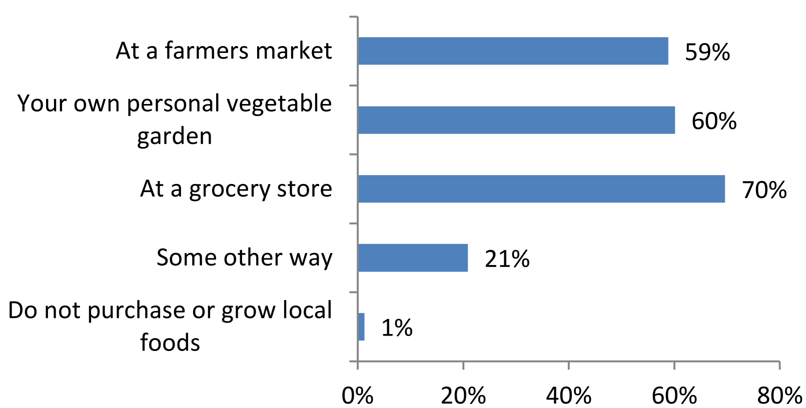
Figure 2: Do you know where and when to purchase a CSA? (Combined)



n=158
Source: Waldo Fresh Survey, June 2014

Another reason for the gap between CSA purchasing and interest in local agriculture could be alternate avenues of access; there are ways for individuals to get locally grown produce without turning to a CSA share. When asked about other ways they purchase local foods, 59% of respondents stated that they go to a farmer's market, 70% said they purchase local foods at a grocery store, and 60% responded that they had their own vegetable garden. Only 1% answered that they didn't purchase or grow local foods at all.

Figure 3: Other than a CSA, do you purchase or grow local foods in any other way? (Multiple responses accepted)



n=158
Source: Waldo Fresh Survey, June 2014

Where People are Spending their Money on Local Produce

When looking at how much money people spend on fresh fruits and vegetables on average in a week, the responses align with the place of purchase. Those who have their own garden, spend less on produce, those who purchase them at a grocery store spend more each week, and those that indicated they purchase their produce another way spent more on produce each week.

Table 3: Percentages of respondents who purchase or grow locals foods by amount of fresh produce purchased weekly

	Under $25	$25 or More
	n=70	n=69
At a farmer's market	61%	62%
Your own personal vegetable garden	66%	62%
At a grocery store	70%	75%
Some other way	16%	28%
Total	100%	100%

Percentage of respondent by segments; multiple responses allowed

"I have my own garden and there are farmers' markets."

"No need for us to, produce what we need here."

Farm Stand/Market Share Interest

The survey also explored the use of farm stands/market shares as a means to purchase local produce. Market shares are similar to CSAs, but offer more flexibility in the type and amount of foods that are provided. Pre-purchased shares represent a specific dollar value and members can use these pre-paid shares to pick out whatever items they wish at the farm or a farmer's market. This differs from CSAs, which provide a specific array of produce every week depending on what is currently being harvested.

Most notable was the extremely low level of awareness about farm stand/market share. More than half (52%) of respondents reported having no familiarity at all with farm stand/market shares, which is significantly higher than those who were not at all familiar with CSAs (25%).

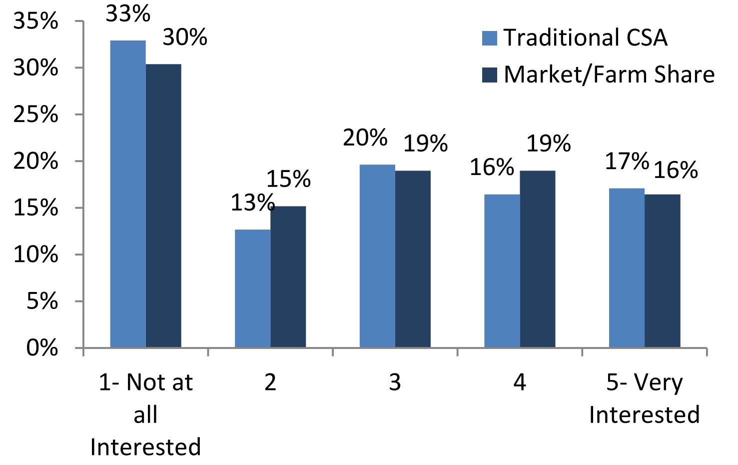
Comparing interest in CSA in general, and interest in farm stand/market shares, there is no significant difference at any reported level of interest (Figure 4).

Likewise, when asked about interest in a CSA that delivers produce to members at their worksites, 43% of respondents with an employed adult in the household reported that they would be interested. This is a modest increase over the percentage of all respondents who expressed some interest in purchasing a CSA in the future (34%), although it is still less than half of all respondents in the survey.

In an open ended question, respondents were given the opportunity to express why they were or were not interested in purchasing a farm stand/market share.

Most commonly, respondents were interested in market shares because they like being able to choose their own produce (13%), general support of the idea and supporting local foods (9%), and having the ability to vary the quantity of foods received (5%). The most common reasons expressed for not being interested included not wanting to change current shopping habits (20%), growing their own produce (17%), and cost (10%).

Figure 4: Interest in Purchasing a CSA or Farm Stand/Market Shares



n=158
Source: Waldo Fresh Survey, June 2014

Table 4: What are the reasons you are/are not interested in purchasing a market or farm stand share in the future?

Positive Responses (Will Purchase)

	%
I like being able to choose my own produce, supplement my normal produce	13%
General support	9%
I like the ability to vary the quantity of food I receive	5%
Desire to support local producers	4%
More affordable than CSA	2%
Fresher, higher quality foods	1%

Multiple responses allowed; n=48

"I think convenience is a big thing for me..."

"I don't want to have a set amount of food delivered, and I'd want the flexibility of choosing what I want."

Negative Responses (Will Not Purchase)

	%
Uninterested, prefer not to change my current shopping habits	20%
I grow my own produce	17%
Worried about the costs, too expensive	10%
This method sounds inconvenient, too complex	7%
Worry about wasting food, getting too much	6%
I do not get out of the house or do my own shopping	3%

Multiple responses allowed; n=80

"I don't want to get mixed up in it; I'd rather have my own garden and eat from that. If not possible, I'll go to the store and buy what I want"

"I'd just have to learn more about it"

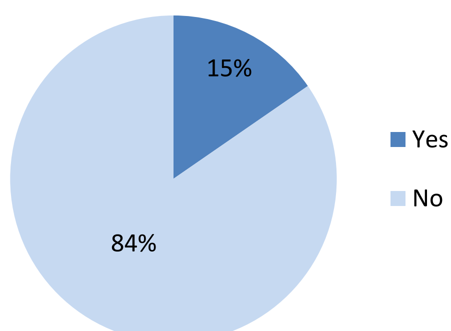
Awareness of Waldo Fresh and Advertisement

Not surprisingly, being a new organization, Waldo Fresh was known by relatively few respondents who participated in the survey. Only 15% of respondents reported having heard of Waldo Fresh. Among those that had heard of Waldo Fresh, over half (62%) had seen some combination of stickers (46%), flyers (42%), or the Waldo Fresh website (4%).

At the time of the survey, respondents associated the name Waldo Fresh with general terms. When asked what the name Waldo Fresh means to them, respondents most commonly answered that it related to fresh or organic foods (53%), and was from or related to Waldo County (51%), two things that happen to be in the name "Waldo Fresh."

When asked if they'd seen advertisements for a CSA, slightly less than half (44%) of respondents answered that they had. The format of the advertising and the location were highly varied. The most common format was a flyer or bulletin board (33%), followed by print publications (25%) and online information (24%). The most common location was at a farmer's market or co-op (22%).

Figure 5: Have you heard of Waldo Fresh?



n=158
Source: Waldo Fresh Survey, June 2014

Table 5: What does the name Waldo Fresh mean to you?

	%
Fresh, high quality, organic	53%
Comes from Waldo County	51%
Locally produced	27%
Produce or vegetables	11%
Farmers' market or co-op	2%
Some sort of organization	2%
Health, healthier	2%
Other	4%
Unsure	6%
Total	100%

Multiple responses allowed; n=127

"Grown in Waldo County, right out of the field."

"Getting food items fresh from the farm."

Demographics

The respondents in the survey were older and and more likely to be female when compared to the U.S. Census data for the county. While 22% of Waldo County adults are age 65+ (2012 American Community Survey), 36% of Waldo Fresh survey respondents were age 65+. Likewise, 22% of Waldo County adults are age 55-64 (2012 ACS); compared to 31% of Waldo Fresh respondents. Additionally, while 67% of Waldo Fresh survey respondents were female, only 51% of Waldo County as a whole are female (2012 ACS).

Limitations

The sample size for this survey (158) is relatively small, resulting in potentially large margins of error in the results, especially in cases where only a subset of respondents answered a question. In addition, the response rate for this survey was also low, so those who agreed to do this survey may be those most interested in local food, CSAs and related organizations in Waldo County. Therefore, it is important to use caution when generalizing the results to the Waldo County region.

Summary and Recommendations

Respondents who completed the Waldo County CSA survey show a strong preference for buying local foods and supporting the local economy. The results show that there are individuals within Waldo County who prioritize issues of locality and community over cost and convenience. Attempts to increase use of CSA programs should focus on the community aspect, which currently appears to be the strongest benefit of CSAs in the community.

However, there are significant issues that will be difficult for CSAs and even farm stand shares to overcome in order to grow and become a larger part of the local food economy. First, individuals desire the highest quality food they can get. Quality can mean many different things. It might refer to superior taste, color, lack of certain pesticides, good value, or many other attributes. The results of this survey suggest that people don't necessarily associate CSAs with higher quality food, and many are happy to grow their own produce in personal gardens or buy local produce from the grocery store. In fact, at least two people mentioned in open-ended comments that they felt the quality of food from CSAs was lower than what they could get elsewhere.

Other open ended responses showed several recurring themes preventing people from taking part in a CSA who otherwise might be interested. One of the most prevalent was a perceived gap between the cost of a CSA and the potential benefit. Many people found the up-front cost too high and didn’t consider the potential long term savings. This may have been due, in part, to another frequent theme in open ended comments: the perception that CSA shares provided too much food for a single individual or even a pair of people to consume. Alongside the fear of wastefulness was a concern that a CSA share would frequently include produce that they didn’t like or do not know how to prepare.

The issue of purchasing an unknown amount of produce in advance is likely well known to those who provide CSA shares already. The fear of unknown foods or the inconvenience of not being able to select the food you receive is a difficult issue to solve. However, the introduction of small changes, such as including a few related recipes along with the CSA produce would be an additional benefit to consumers at little additional cost to the producer. These recipes would provide CSA purchasers with information on how to cook the produce in question and would provide consumers with ideas on different ways to serve and eat the food.

Individuals who participated in this survey were in large part engaged with and interested in local agriculture; 60% reported having a home garden, 59% said they participate in farmers’ markets. These are local agriculture strategies that many in Waldo County already use. Yet, nearly half of respondents reported little or no familiarity with CSA. CSAs would either need to replace those strategies or be placed as a complement to them. Creating less bountiful CSA shares which could be positioned as a supplement to home gardening or farmers’ market visits could help, in addition to the use of more flexible farm stand shares as an alternative to the more restrictive CSAs.

References

U.S. Census Bureau, 2008-2012 American Community Survey