2017

Consumer Insights to Support Messaging for Vermont Direct Markets

Northeast Organic Farming Association of Vermont

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Table of Contents

Introduction

This study examines responses from three focus groups and two online surveys of in-state and out-of-state food consumers in Vermont to determine the frequency, motivation, and barriers of shopping at direct markets. This examination of the demographic profile of food consumers indicates they are more likely to be female, married, and have completed college. The age levels, income levels, and employment status are similar between direct market shoppers and direct market non-shoppers. We then parsed the data further by each direct market: farmers markets, farm stands, and CSAs.

The objective of the research study was to determine how to increase awareness and purchases for each direct market channel. We analyzed the data and categorized it into three segments based on shopping frequency: true local consumers (TLCs), occasional local consumers (OLCs), and rare local consumers (RLCs). We then broke these down by generation (Millennials [18-34], Gen X [35-54], and Baby Boomers [55+]).

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Scope of Work

Key questions explored in the research include:

A. The frequency and motivations for shopping direct from farmers (via farmers markets, farm stands, and CSAs).
B. Barriers that prevent more direct purchasing.
C. Best communication channels to reach the target audiences.
D. Testing reactions to common assumptions about direct markets.

The research took place in different locations across the state of Vermont, representing a diverse mix of rural and urban participants.

This project employed a mix of primary and secondary research. Three focus groups were conducted in Chittenden County, Windsor County, and Rutland County. Two online surveys were distributed, one for in-state shoppers and one for out-of-state shoppers.

Executive Summary

We developed this report to determine the frequency, motivations, and barriers of shopping at direct markets in Vermont. To reach our goal, we conducted two surveys and three focus groups, and then segmented our data based on shopping patterns (true local consumers, occasional local consumers, and rare local consumers) and generation (millennials [18-34], Generation X [35-54], and baby boomers [55+]) to get a granular view of the shopping habits of Vermonters and Vermont tourists. However, after segmentation, we discovered trends across all age groups and shopping pattern when considering shopping at direct markets. Below we have included insights into the trends associated with each individual direct market channel.

Farmers Markets

Shopping patterns among farmers market shoppers created a bell curve, with occasional local consumers (OLCs) making up the majority and true local consumers (TLCs) and rare local consumers (RLCs) representing the minority.

Data showed the most common considerations for shopping at farmers markets across all age groups and shopping patterns were **quality**, **freshness**, and **supporting local farmers**. Motivations to shop more at farmers markets were focused on the **convenience** of the direct market. Respondents wanted **different and/or more hours of operation** and **easier accessibility (parking and location).** While these conditions may not be easily altered, respondents also noted that more competitive prices and greater variety were also significant motivators.

Common barriers that prevent shopping at farmers markets include **inconvenient hours** and the perceived **high cost of items**. A majority of respondents also grow their own food which proved to be a common barrier for shopping at farmers markets, as well as other direct market channels.

Farm Stands

Like farmers markets, shopping patterns among farm stand shoppers created a bell curve, with OLCs making up the majority and TLCs and RLCs making up the minority.

Data revealed the top considerations for shopping at farm stands include **quality**, **freshness**, **supporting the local farmer**, and **farming practices**. In this case, farming practices include organic-certification and sustainability of farms. Motivations to encourage shopping at farm stands were, again, focused on **convenience (location and**

hours of operation). Additional motivations included **supporting local farmers** and **increased product variety**.

Respondents stated that farm stands are **too far away** and **too expensive**, which prevent frequent shopping at farm stands. Additionally, a significant number of respondents grow their own produce which limits their desire to frequent farm stands.

CSAs

Unlike the other direct market channels, shopping patterns among CSA subscribers did not form a bell curve. Instead, RLCs made up the majority, with OLCs and TLCs making up the minority. Common considerations for subscribing to CSAs across all ages and shopping patterns include **quality**, **freshness**, and **supporting local farmers**.

While few regularly subscribe to CSAs, data showed that those who do subscribe listed very few factors that prevent them from subscribing or that motivate them to subscribe more often. We believe this shows that those who do subscribe to CSAs have a **high appreciation** for the direct market channel and have few suggestions to improve them.

However, the majority of respondents were not regular subscribers. For this majority, **more competitive prices** and **supporting local farmers** are significant motivators for increasing subscriptions. Significant barriers that prevent consumers from subscribing to CSAs include **they grow their own produce** and they view CSAs as being **too expensive** and **offering limited selection**.

Messaging

Despite granular segmentation of the data, we found common trends across age groups and shopping patterns that informed our recommended messaging. Our recommendations provide horizontal messaging we believe will resonate with a wide audience, while also providing messaging that speaks to specific personas based on the common lifestyles represented in the data:

- The Grower;
- The Organic Loyalist;
- The Value Shopper;
- The On-the-Go Shopper;
- The Tourist; and
- Families.

Horizontal Message

Awareness was an issue across the board with Vermonters. Repeatedly, survey and focus group respondents stated that **different/more hours of operation** and **different locations** would motivate them to shop at direct markets more often. While it may be difficult or impossible to change the location and hours of direct markets, it is critical to **increase Vermonters' awareness** of where and when specific direct markets are taking place. Efforts should be made to better advertise the location and hours of operation of all direct markets across Vermont.

As stated above, we found that the values of **freshness, quality, price, and supporting local farmers** are messages that resonated with Vermonters across all age groups and shopping patterns. Therefore, we recommend that all messaging to the below personas implement these messages to ensure resonation and encourage behavior change.

Grower

We found that a major barrier preventing Vermonters from shopping at direct markets is that they grow their own produce at home. These growers have the convenience of having their produce in their backyard, while also **knowing and trusting their own farming practices**. These consumers also believe their homegrown produce is cheaper than the produce available at direct markets.

Knowing these barriers, we recommend messaging targeted at growers should encourage them to shop at farm stands and CSAs. Farm stands allow consumers to **build trust** by speaking with farmers to learn about their farming practices, while also enabling them to avoid the crowds and parking issues associated with farmers markets. CSAs also offer a transparent relationship with farmers while also offering convenience with their flexible models.

Messaging should highlight how shopping at farm stands will support local farmers while also **supplementing growers' homegrown produce**. For example, if a grower's tomato supply was weak this year, they can visit the nearest farm stand to ensure they have plenty of produce to get the nutrients they need, while also supporting their local farmer.

Organic Loyalist

Another major trend we noticed in the focus groups and surveys is that Vermonters care about the farming practices associated with the produce they buy. Organic loyalists are not as concerned with price as much as they are concerned with how “organic” their produce is. Knowing that their food is **organic-certified, high-quality, and fresh** are significant motivators to increase their shopping at direct markets. Trust is their biggest barrier because often farmers’ practices are not displayed at direct markets, so they are unsure if food is organic-certified.

We recommend advertising all direct markets to organic loyalists because organic-certified outlets exist within each channel. Direct market channels that are organic-certified should make their farming practices clear, so that organic loyalists can rest-assured their food is meeting their standards.

Messaging targeted at organic loyalists should highlight the number of **organic-certified farms** in the area, while emphasizing the **quality** and **freshness** of local produce. To further convince organic-loyalists to choose direct markets over traditional grocery stores, messaging should also discuss how shopping at direct markets supports local farmers, as this is a message that resonates with shoppers across the board.

Value Shopper

Price was a concern for a majority of in-state survey respondents and focus group attendees. Therefore, it is important to develop messaging that speaks directly to the price-conscious value shopper. We recommend advertising farmers markets and farm stands directly to value shoppers because they may not be able to afford the high initial costs associated with CSAs.

With price being these shoppers’ biggest barrier, it is important to highlight the **value of the produce** they can purchase at direct markets. Messaging should aim to overcome the perception that farmers markets and farm stands are much more expensive than the traditional grocery store, while also explaining the value of purchasing local produce. Explain how local produce is **high quality and fresh** because it was grown nearby – shoppers can rest assured they are purchasing highly nutritious, fresh food for only a slightly higher price than what is available at their grocery store. Not to mention, they are also **supporting their local farmer** when they shop at direct markets.

On-the-Go Shopper

On-the-go shoppers often have little time to shop and are **looking for the quickest, easiest way to purchase groceries**. **Convenience** is the most significant factor that prevents these consumers from shopping at direct markets. We define convenience as time needed to get to and from the direct market channel, time needed to find parking, and the ability to shop during the market’s hours of operation.

We recommend advertising CSAs specifically to on-the-go shoppers. They will not have to deal with crowds or parking issues associated with farmers markets, and farm stands may not be close enough for these shoppers to quickly pick up needed items. CSAs have multiple options that might fit the hectic lifestyle of these consumers. Messaging should highlight the customization available with CSAs. Emphasize how some offer home delivery, while others issue debit cards that can be used at farm stands so they can shop whenever is most convenient for them.

Messaging can also explain product availability. Are shoppers able to add meat and dairy to the traditional produce baskets from their CSA? If so, let them know. These shoppers want shopping to be as easy as possible, so let them know their options and how simple it is for them to receive their groceries on their terms.

Tourists

Vermont tourists' greatest needs for direct markets revolved around purchasing food – both to prepare during their visit and to take back to their home state at the end of their trip. Their biggest **barrier was awareness** of when and where direct markets are taking place. When visiting, the majority of tourists stay at hotels/motels and inn/bed and breakfasts. To overcome awareness, we recommend targeting these establishments with messaging that provides information about the locations and hours of nearby farm stands and farmers markets.

Additional messaging should showcase how tourists can truly **experience Vermont** by purchasing the local products at farm stands and farmers markets. We know that the majority of tourists are cooking one meal per day throughout their stay, so messaging should highlight that while they are in Vermont, they should live like Vermonters and eat the local produce, while also explaining the **freshness** and **quality** of local produce. At the end of their trip, tourists can bring Vermont home with them by purchasing products at farm stands and farmers markets before they depart.

Families

When looking specifically at households with three or more members, we found the top barriers that prevent them from shopping at direct markets more frequently revolved around price, convenience, and growing their own produce. **Better/easy to access locations**, **more hours of operation,** and **competitive pricing** would motivate families to shop at direct markets more frequently.

Families are often rushed and are looking for a quick, cheap solution to purchasing produce. We recommend advertising CSAs and farm stands to families because these markets will allow them to quickly, conveniently shop for produce without the parking hassles and crowds associated with a farmers market.

For this group, it is critical to overcome the perception that direct markets are more expensive than grocery stores. Quality, freshness, and supporting local farmers are top considerations for this group as well, so messaging should highlight the value of purchasing goods at direct markets. It should explain how the slight difference in price is worth the difference in quality and freshness.

As for the convenience factor, messaging should also highlight the customization available with CSAs and emphasize how some offer home delivery, while others issue debit cards that can be used at farm stands so they can shop whenever is most convenient for them.

Focus Groups
Methodology

Primary data was collected through three focus groups (Chittenden County, Windsor County, and Rutland County) and administered through onsite interviews of 22 food shoppers in Vermont during August to October 2017.

Chittenden County

Demographics of Chittenden County

The demographics of Chittenden County are different from any other Vermont county. 84 percent of the population is under the age of 54, with the average age being 36 years old. Almost 50 percent of the population older than 25 has a bachelor's degree or higher, indicating its population is more educated than the rest of the state. It has the highest median income, $65,350, and the most CSAs per county. In addition, Chittenden county has a high number of farmers markets and a high concentration of supermarkets - direct markets' retail competitor.

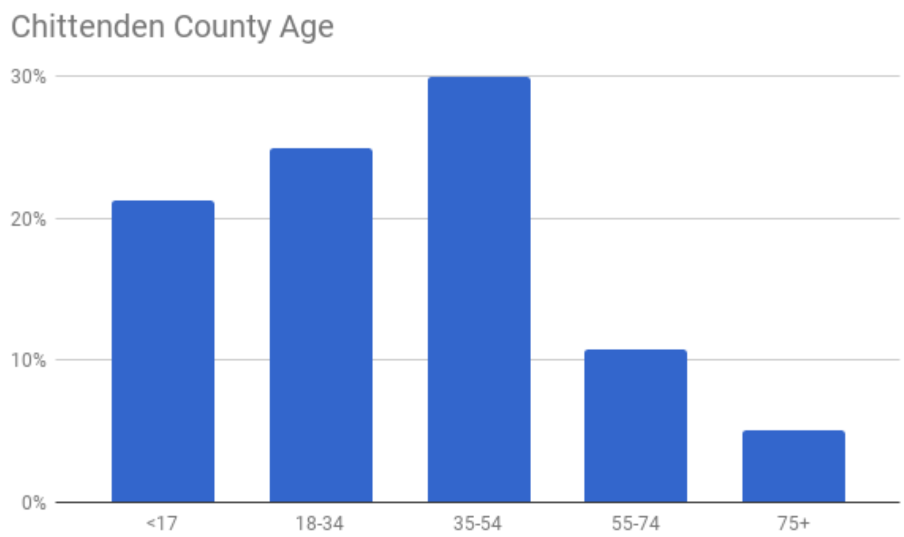
We recommended Chittenden County because of its unique demographic makeup compared to the rest of Vermont and its high number of CSAs. Burlington is easily accessible from I-89, I-189, Route 7, Route 2, and Route 127.

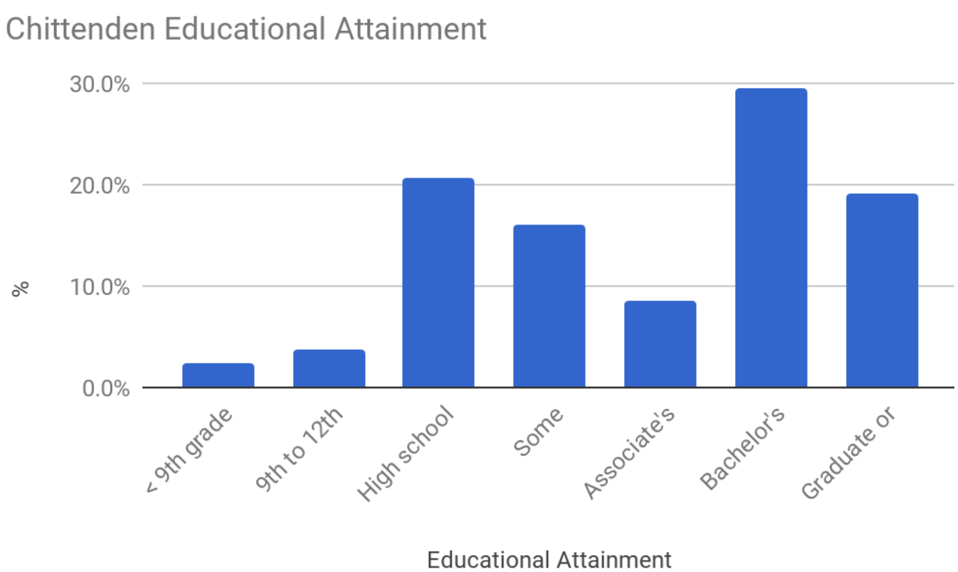
Farmers Markets: 8
CSAs: 18
Supermarkets: 14

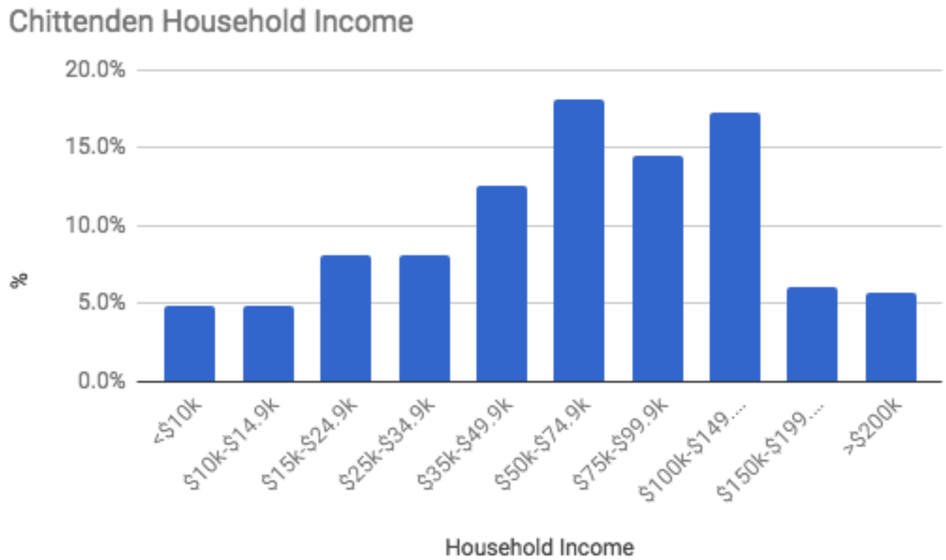
Demographic Data:
Population: 156,545 (25 percent of Vermont)
Median Income: $65,350

Major Towns:
Burlington - 42,000 (pop.)
Essex - 20,000
South Burlington - 19,000
Colchester - 17,000
Milton - 10,000

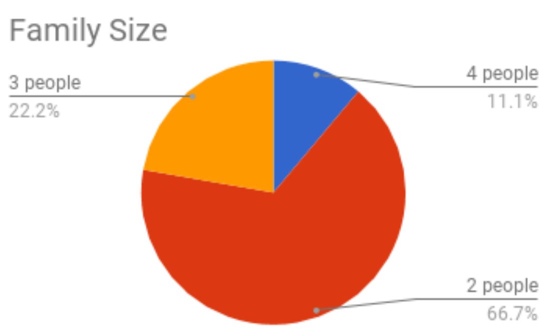
Demographic Makeup of Chittenden County as a Whole

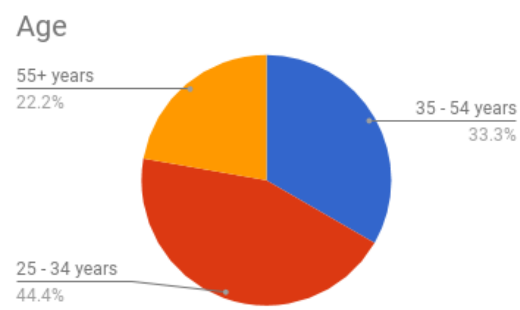


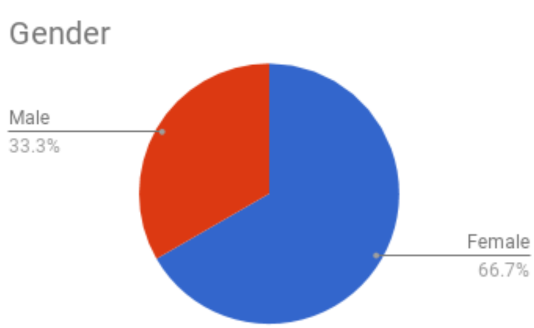


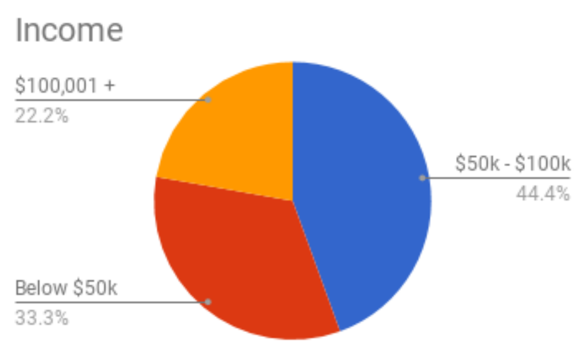


Demographic Makeup of Chittenden County Focus Group









Windsor County

Windsor County has the highest number of farmers markets and CSAs based on its population. This county has 11 farmers markets (the most of any county), 13 CSAs, and contains 9.1 percent of Vermont's population. Both major Vermont interstates, I-89 and I-91, run through Windsor County, which shares a border with New Hampshire. The median household income is just below average at $52,965. The county is also home to the Billings Farm and Museum, a source of agritourism. Windsor's demographics mirror other Vermont counties.

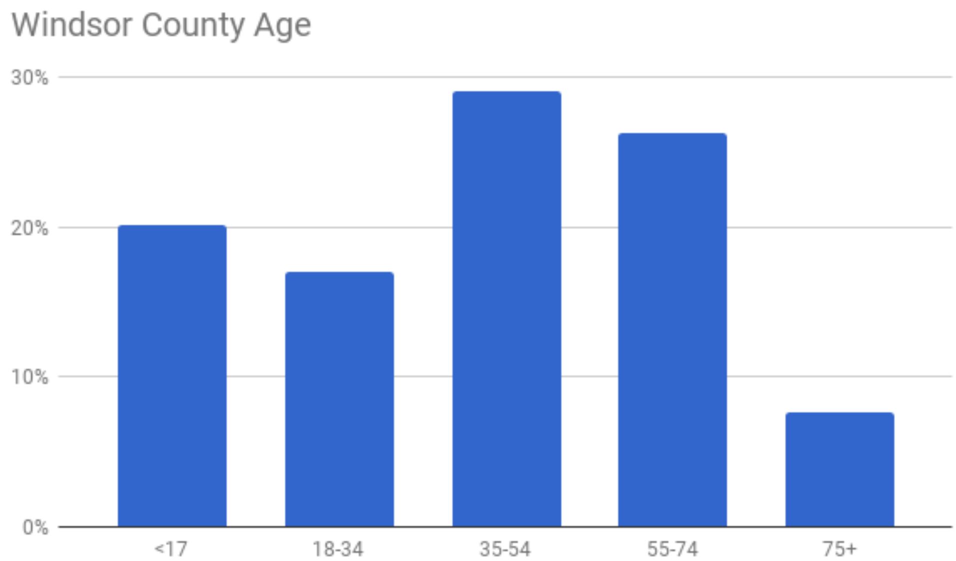
We recommended Windsor County because of its high concentration of direct market channels.

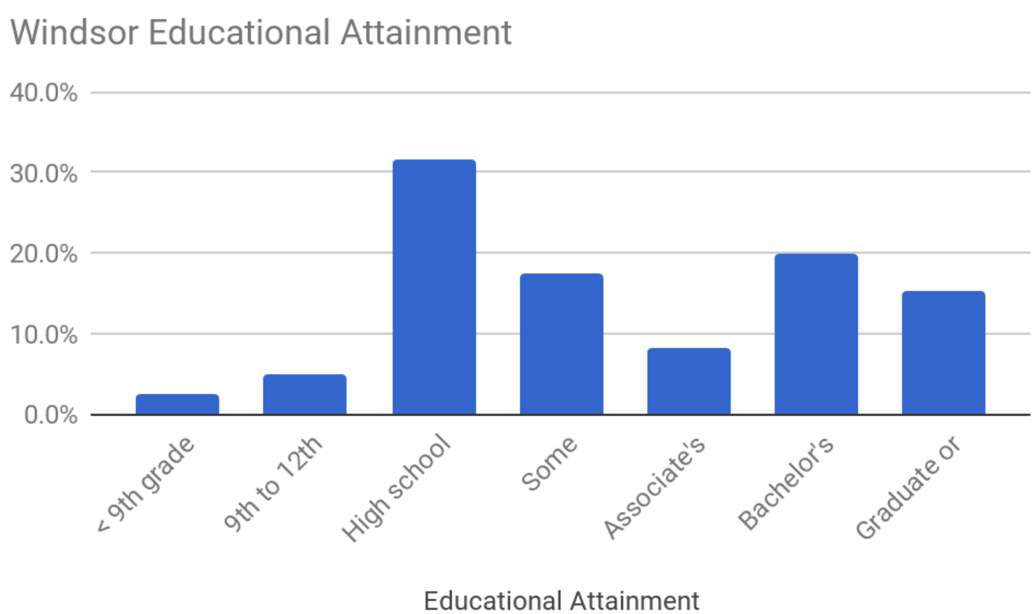
Farmers Markets: 11
CSAs: 13
Supermarkets: 11

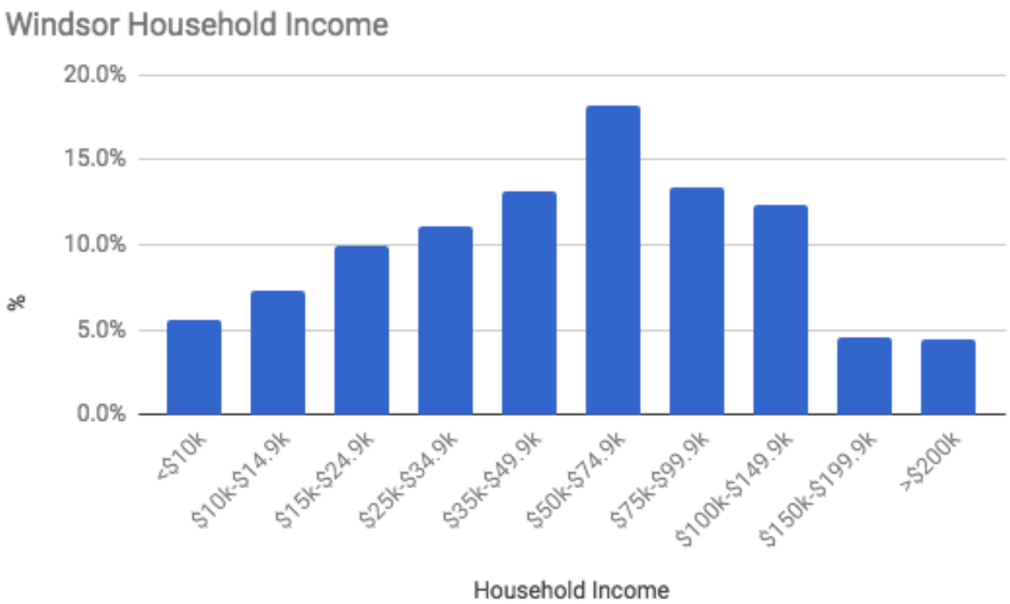
Demographic Data:
Population: 56,670 (9.1 percent of Vermont)
Median Income: $52,965

Major Towns:
Hartford - 10,000 (pop.)
Springfield - 9,400
Windsor - 3,600
Norwich - 3,400
Woodstock - 3,000

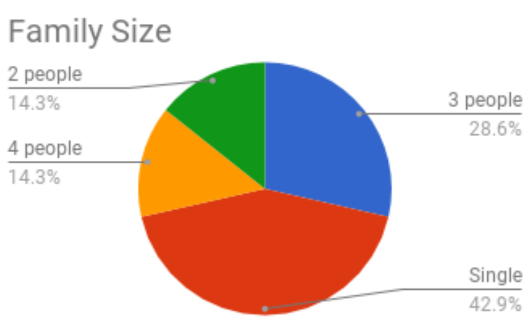
Demographic Makeup of Windsor County as a Whole

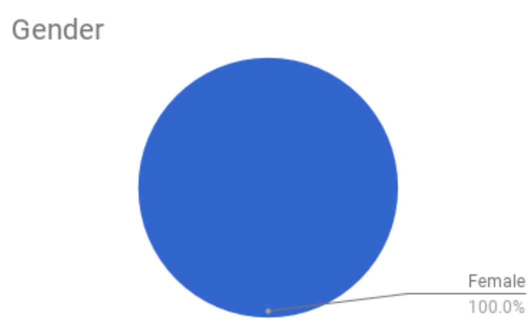


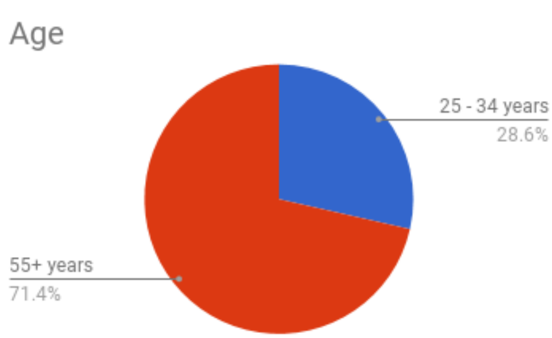


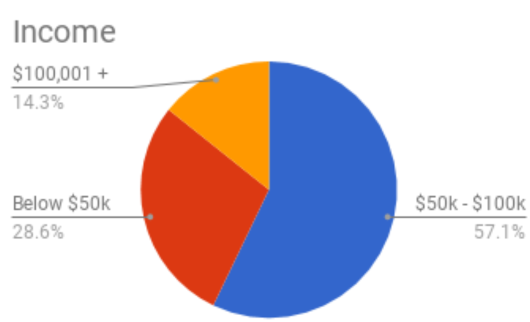


Demographic Makeup of Windsor County Focus Group









Rutland County

Rutland County is the second most populated county with 10 percent of the population of Vermont. Rutland County's demographics are similar to the average Vermonter, but the median income is slightly lower than average at $49,372. The county's established employers set it apart from others across the state. The primary industries are healthcare and social assistance, educational services, and manufacturing. Its two biggest employers, General Electric and Rutland Regional Medical Center, each employ more than 1,000 workers. With Killington and Pico Mountain Ski Resorts nearby, we expect there are many tourists and summer residents here as well.

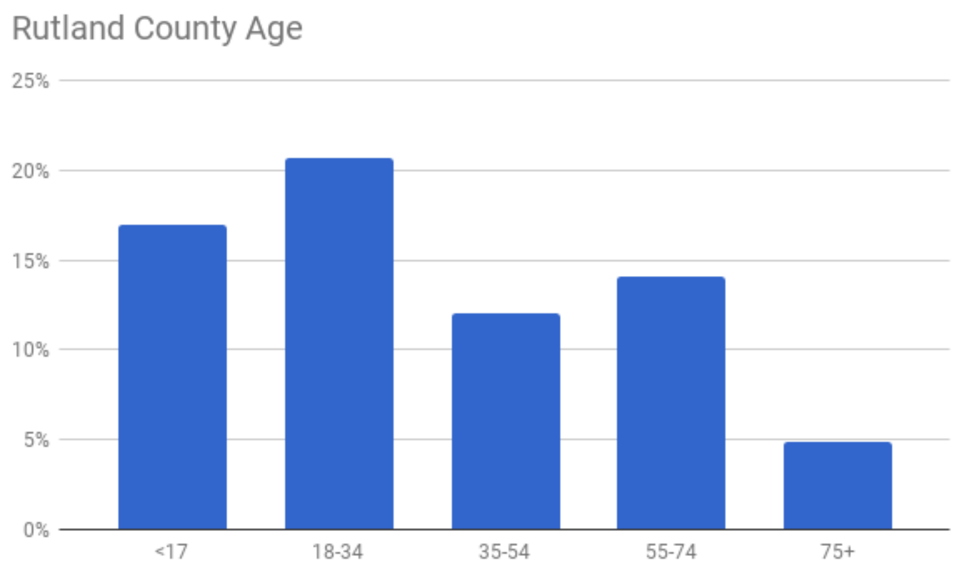
We recommended Rutland County because of its diverse employment base and current participation in direct markets. It ranks behind other counties in CSAs and farmers markets, even though it is the second highest populated Vermont county. Rutland City is easily accessible from Route 7, Route 4, and Route 3.

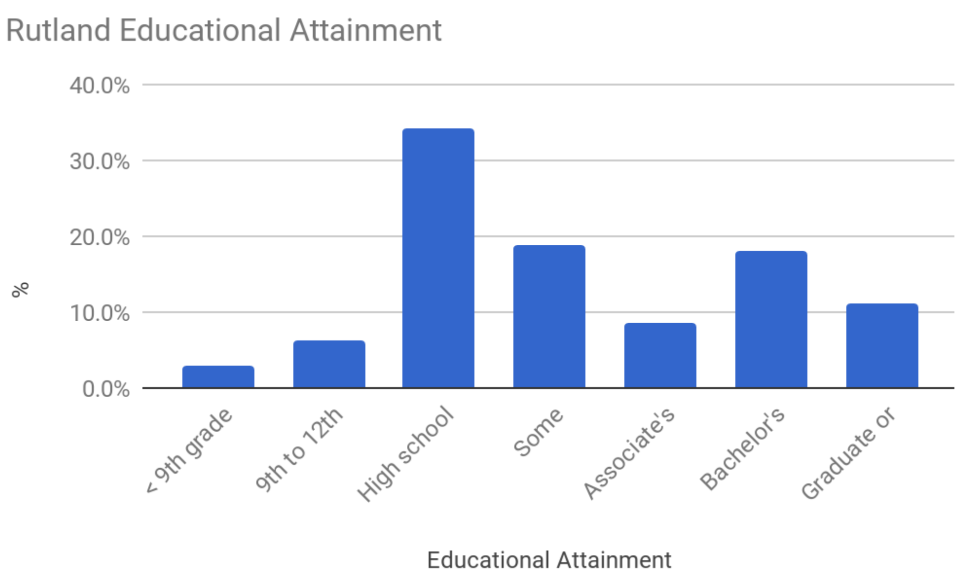
Farmers Markets: 6
CSAs: 9
Supermarkets: 7

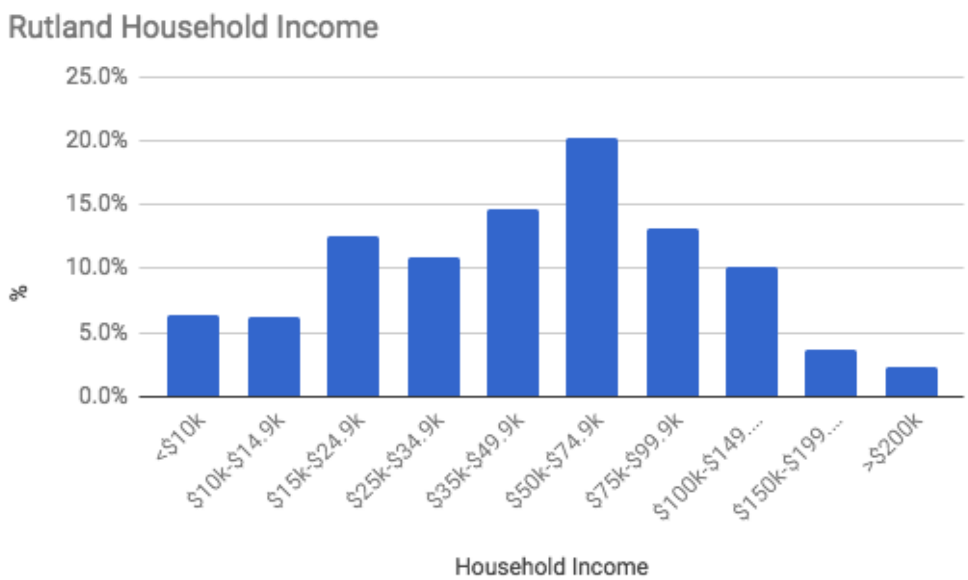
Demographic Data:
Population: 61,642 (10 percent of Vermont)
Median Income: $49,372

Major Towns:
Rutland City - 17,000 (pop.)
Rutland Town - 16,000
Castleton - 4,700
Pittsford - 3,000
Fair Haven - 2,700

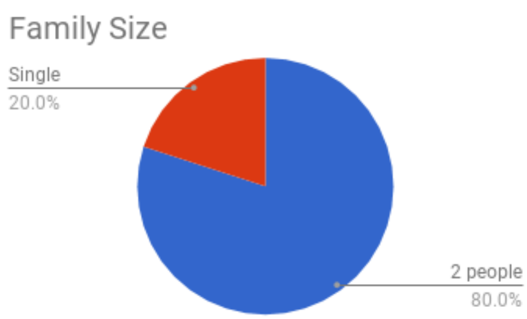
Demographic Makeup of Rutland County as a Whole

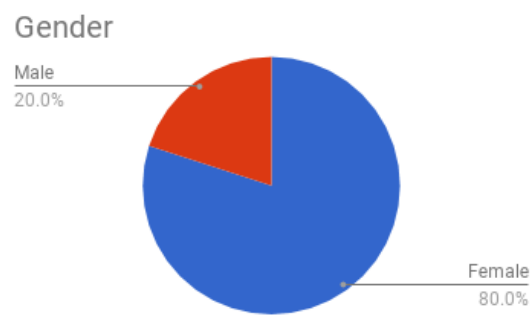


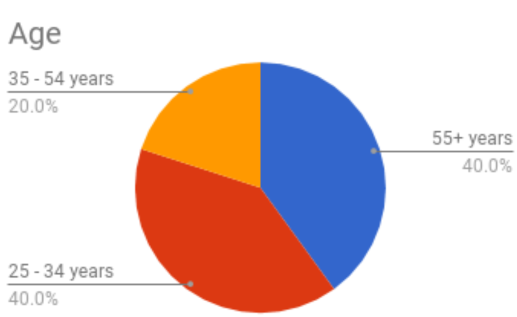


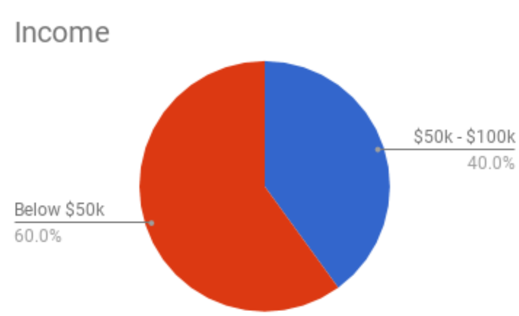


Demographic Makeup of Rutland County Focus Group









Results

Within this section, we will cover the following topics based on information received during the three focus groups:

A. The frequency and motivations for shopping direct from farmers (via farmers markets, farm stands, and CSAs).
B. Barriers that prevent more direct purchasing.
C. Testing reactions to common assumptions about direct markets.
D. Consumers Insight Quotes

For this section, TLC, OLC, and RLC can be defined as:

TLC: respondents that shop at direct markets weekly or more than weekly.
OLC: respondents that shop at direct markets several times per month, monthly, or several times throughout the season.
RLC: respondents that shop at direct markets rarely or never.

A. Frequency and Motivation

The table below shows the motivations for shopping at farmers markets:

Farmers Market Motivations	Frequency	Percentage
Freshness	11	25%
Variety	8	18%
The atmosphere	8	18%
To socialize	4	9%
To support local economy	3	7%
Samples	3	7%
To meet the farmer	3	7%
Something to do	3	7%
Prepared Food	1	2%

Total Motivations: 44
Total Unique Motivations: 9

The table below shows the motivations for shopping at farm stands:

Farm Stand Motivations	Frequency	Percentage
Freshness	7	30%
Talking to farmers	5	22%
It's cheaper	2	9%
Variety	2	9%
Convenience	2	9%
Atmosphere	2	9%
Personal Touch	2	9%

Buy direct from farmer	1	4%
Support local business	1	4%
Small scale	1	4%

Total Motivations: 23

Total Unique Motivations: 10

The table below shows the motivations for subscribing to CSAs:

CSA Motivations	Frequency	Percentage
Variety	4	22%
Convenience	3	17%
Fresh Produce	3	17%
Buy Direct from Farmer	3	17%
Support Local Business	2	11%
Try New Things	2	11%
Price	1	6%

Total Motivations: 18

Total Unique Motivations: 7

Other observations related to motivations to buy local Vermont food, no matter where it is sold:

- Support local economy/people
- Healthier
- Higher trust
- Lower carbon footprint/food mileage
- Environmental reasons (lower carbon footprint)
- Quality: Tastes better, fresher food
- Talking to farmer/grower
- Simple, smaller scale

Overwhelmingly, participants told us when faced with two comparable items, **they would almost always choose the Vermont-grown item**. The limiting factors here were price and convenience.

B. Barriers

Barriers that prevent farmers market purchases:

Farmers Market Barriers	Frequency	Percentage
Expensive	20	40%
Availability of produce	6	12%
Inconvenient hours	4	8%
Crowds	3	6%
Too much junk food/prepared food	3	6%

Not close by	3	6%
Parking	3	6%
Cash only	1	2%
Another shopping spot	1	2%
Low awareness	1	2%
A day event, not a grocery trip	1	2%
Farmers' practices	1	2%
Habits	1	2%
No car	1	2%

Total Barriers: 50

Total Unique Barriers: 15

Barriers that prevent farm stand purchases:

Farm Stand Barriers	Frequency	Percentage
Awareness	9	32%
Not close by	7	25%
Farmers' practices	5	18%
Expensive	5	18%
Cash only	1	4%
Availability of produce	1	4%

Total barriers: 28

Total Unique Barriers: 6

Barriers that prevent subscribing to a CSA:

CSA Barriers	Frequency	Percentage
Lack of choice	9	24%
Cost	8	22%
Lack of cooking knowledge	6	16%
Inconvenient pick up	5	14%
Worried about wasting uneaten food	5	14%
Very seasonal produce	2	5%
Logistics	1	3%
Risk of losing crops	1	3%

Total Barriers: 37

Total Unique Barriers: 9

Overall, participants agreed they would go to more direct markets if they had the information available to them. This included knowing the hours, days, prices, products being sold, how to get there, and knowing the farmers' practices. People said they would best utilize this information if it were in an email listserv (Vital Communities, Front Porch Forum) or in an app. In the Rutland focus group, a participant suggested including direct market information in the Rutland Area Farm and Food Link (RAFFL) Local Food Guide.

C. Testing Common Assumptions

Farmers Markets Assumptions	Overall	Chittenden County	Windsor County	Rutland County
Vermonters are not aware of their local farmers markets	False. Vermonters know where their farmers markets are and most of them attend them at least once a year.	On average, participants shopped at 1.56 different farmers markets in the past 12 months.	On average, participants shopped at 1 farmers markets in the past 12 months.	On average, participants shopped at 2.6 different farmers markets in the past 12 months.
Not convenient for weekly grocery shopping	True. Participants do not go to farmers markets with lists. Because of the hectic atmosphere (parking is a hassle, large crowds, too many vendors), shoppers think they would be overwhelmed if they went to farmers markets to shop for groceries.	Produce is not the primary reason for shopping at farmers markets. Cannot always be sure they will find what they are looking for.	A form of entertainment more than a shopping destination. Like to bring friends and family there. Notice that popular produce runs out quickly and some only take cash.	Go there intending to spend money, but hardly ever with the intention of a specific product.
Vermonters do not know the prices of food at farmers markets	True. People understood that prices change with supply and demand, but wanted to know how they compete with grocery stores.	Same as overall.	Same as overall.	Same as overall.
Vermonters perceive prices to be too high at farmers markets.	True. Almost everyone perceived prices to be higher.	See price perceptions table on next page.	See price perceptions table on next page.	See price perceptions table on next page.

We tested common assumptions related to price sensitivity of locally-grown food and organic food. Participants believe that prices at both farmers markets and farm stands are the same as, or more than, grocery store prices. Interestingly, participants perceive an item in a CSA basket to either be more or less expensive than grocery store prices.

In Chittenden County, participants said they would pay an average of 63 percent more on a locally grown cucumber and 127 percent more on a locally grown organic cucumber.

In Windsor County, participants said they would pay an average of 69 percent more on a locally grown cucumber and 137 percent more on a locally grown organic cucumber.

In Rutland County, participants said they would pay an average of 27 percent more on a locally grown cucumber and 57 percent more on a locally grown organic cucumber.

The table below shows participants' price perceptions of each direct market compared to prices at a grocery store.

Price perceptions compared to grocery stores	Farmers Market	Farm Stand	CSA
Less	0	3 responses	7 responses
Same	6 responses	4 responses	2 responses
More	13 responses	9 responses	9 responses

Farm Stands Assumptions	Overall	Chittenden County	Windsor County	Rutland County
Vermonters are not aware of their local farm stands	True. They are not aware of locations and hours.	Participants shop at farm stands if they are on the way.	Participants knew of the ones close to them.	Participants knew of the ones close to them, but not necessarily their names.
Not convenient for grocery shopping	True. Not accessible to everyone. Extremely convenient for those close by, but not those far away from them.	Same as overall.	Same as overall.	Same as overall.
Vermonters do not know the prices of food at farm stands	True. Some thought that prices were less, others more, others thought it was competitive with grocery stores.	Same as overall.	Same as overall.	Same as overall.

CSA Assumptions	Overall	Chittenden County	Windsor County	Rutland County
Vermonters know what CSAs are	Not true everywhere.	Most, but not all, knew. Some had had multiple CSAs, others had never heard of them before.	Some knew, others did not. Crossroads/Killdeer debit card model was well liked.	Almost no one knew what a CSA was.
Vermonters believe a lot of food goes to waste from CSA shares	True. Those who knew about CSAs often cited this as an excuse. The underlying motive here was lack of confidence in cooking or preserving the extra food.	Some tried to split the shares or got it for their family.	It is hard for some people to see hard-earned money wasted when they throw their extra food out.	Not enough people knew what a CSA was to answer truly.
Vermonters who are open to new experiences like CSAs	True. Confident cookers who want to be creative, try something new, and mix it up love CSAs for this reason.	Participants try new things based on recipes, Pinterest, and mixing new things together.	Participants liked the debit card CSA idea because it was simple and allowed the less creative cooks to participate in a CSA.	Not enough people knew what a CSA was to answer truly.
Vermonters believe CSAs do not fit their lifestyle	True. Although, many have found a way to make it a part of their lifestyle. In each group, families with young children liked the convenience. Less time spent shopping in stores. Getting kids excited about trying new foods.	Those with a CSA change their shopping, cooking, and eating habits. When pick up spots are inconvenient, that is a deal breaker.	Those with a CSA change their shopping, cooking, and eating habits.	Not enough people knew what a CSA was to answer truly.
Vermonters believe CSAs are too expensive	True and false. The upfront cost is a deal breaker for some, even if they know the reason. When asked about the price, participants perceived individual items in a CSA basket to be less expensive than the	Up front cost without control in deciding produce is a deal breaker for those who have not tried it.	Those who have not tried a CSA believe it is too expensive.	Not enough people knew what a CSA was to answer truly.

	comparable store item.			

General Direct Market Assumptions	Overall
Vermonters like to buy food that he/she knows how to cook	True. When Vermonters want to try new things, they look for recipes online, from their farmers.
Vermonters trust locally grown food over commercial food	True. Overwhelmingly more trust for local produce and meat than commercial produce and meat.
Vermonters' relationship with their farmer is important	Neutral. On a scale of 1-10, 1 being low and 10 being high, participants responded on average 6.1. This is because it was either important or not important at all for others. Not good for universal messaging, better for targeted messages. In Chittenden County, the average is 5; Windsor County 7.3; and Rutland County 6.4.
Appearance of produce matters to Vermonters	True. Appearance, how ripe a piece of produce looks, smells, feels matters. No differences across the board.

D. Consumer Insight Quotes

Below we have included quotes from focus group attendees to provide insight into actual consumer perception. Additional quotes can be found in the Appendix (p. 84-130).

"Vermont has really excellent local food infrastructure and I wanted to support that."
"I go [to the farmers market] just to go. I know I'm going to spend $40 either way. 2 hours later, I'm leaving with something else I didn't know I needed."

"[My CSA] is a fun way to get my little boy excited about fresh healthy food you know when we get something new in the CSA we haven't tried before, he's a much more adventurous eater."

Q: Why do you buy local food?
A: "I think it's partly environmental. Just having to transport things long distances is a huge energy cost. With some exceptions, like I have to have avocados and things like that."

"Being rigid in what I wanted wasn't as helpful as learning what was in season and changing what I was going to cook."

"Killdeer CSA made it a lot easier because I could incorporate it into menu planning. I won't go back to a farm CSA because I just felt terrible about what I wasted."

Discussion

Farmers Markets

Vermonters like farmers markets for the experience. Their main motivation for attending is the variety of quality products and fresh produce. TLCs see farmers markets as a place to get groceries and would love it if farmers' practices were more clearly known. OLCs love the experience. The atmosphere, variety of samples and products, and delicious prepared foods draw them to farmers markets. They are more price conscious and wish they knew more about the prices of produce and meat because they assume these items are more expensive at farmers markets than at grocery stores. If they believe prices are competitive, they would shop at direct markets more often for their food. RLCs occasionally come to the farmers markets to socialize. This destination is a place to catch up with friends, let the kids run around, and get a meal.

There are several barriers keeping Vermonters from buying groceries at farmers markets. Across the board, parking is a hassle; there is an overwhelming amount of choice; and the crowds are too big. The thought of grocery shopping at farmers markets is seen as an inconvenience to many Vermonters. OLCs and RLCs believe the produce is too expensive. The inconsistent availability of produce at farmers markets frustrates people who try to shop with a plan. It is harder to shop with a more conventional 'shopping list' at farmers markets. Typically, shoppers like the farmers market to find and try new things rather than buying staple grocery items. Some TLCs dislike the crowds associated with the prepared food and entertainment because it gets in their way of shopping.

Farm Stands

Farm stands are either extremely convenient for those who live close by or inconvenient for those who live far away. They are a more regular shopping spot for TLCs who live close by. OLCs and RLCs see farm stands as an opportunistic shopping spot – they are likely to go if they are passing by and need something there. The main motivation for shopping at farm stands is to get fresh produce and quality products.

TLCs love talking to the farmer, who they see as an expert for recommendations on food choices. The feeling of supporting the farmer, decreasing food mileage, and the convenience of fresh food are major factors for those who live close by and love buying at farm stands. It is not convenient for people who do not live near farm stands to go to them.

The main barrier for not going to farm stands is awareness. This includes awareness of business hours, prices, whether or not it is cash only, product availability, directions to get there, and knowing the farmer's practices or story.

CSAs

Vermonters like and dislike CSAs for many of the same reasons. Those who subscribe or who have subscribed in the past are motivated to subscribe by the variety of food they get from CSAs, the convenience of CSA pickups, and the opportunity to try new things.

The main barrier for those who have never subscribed is the perceived lack of choice. This relates to lack of choice in the types and amount of produce received each week and the restrictive upfront cost of the subscription. TLCs did not subscribe or re-subscribe because of inconvenience of the pickup location, the share was too big, or the cost became too much. OLCs were worried about not knowing how to cook everything, the perceived inability to plan meals, and the large upfront cost. RLCs disliked the logistics of the CSA – a large upfront cost with risk and no choice in where their money goes. These people are not only price sensitive, but also are not confident in their ability to cook or place much value on the quality of their food.

In-State Survey

Methodology

Primary data was collected using an online survey software which administered questions to an online portal of 451 food shoppers in Vermont from September to October 2017. The sample size covered every corner of the state of Vermont, from Brattleboro to Newport, from Alburgh to Bennington, and everything in between. See Appendix (p. 131) for distribution map.

We conducted the in-state online survey to gather data from a diverse cross-section of Vermonters who currently shop at direct markets. These individuals have at least a baseline understanding of farmers markets, farm stands, and CSAs. The survey outcome was used to determine considerations, motivations, and barriers when shopping at direct markets and what messaging could be used to increase attendance frequency.

The demographic profile was made up largely of 55+ in age (45.7 percent), female (75.6 percent), two in household (45.2 percent), income range of $50,000 - $100,000 (39.3 percent), and a bachelor degree level of education (45.2 percent). Of the female respondents, 81.6 percent indicated they were the primary shopper in their household. While the survey's household income matched the results of the most recent Vermont census data, the number of respondents with an advanced degree was higher than the state's average.

The questions were split into four categories, which were created to identify the primary shopper, establish baseline buying patterns, pinpoint ways to increase the frequency of visits, and understand the preferred communication channels to promote messaging. Further, each market was broken out into total local consumers (TLCs), occasional local consumers (OLCs), and rare local consumers (RLCs) based on consumer shopping patterns. This data provides the insight needed to develop a marketing strategy that targets the right audience, builds the right content, and distributes it through the optimal marketing channels.

This data was gathered through multiple channels. They consisted of, but were not limited to:

E. Regional listservs (i.e. Front Porch Forum, Vital Communities)
F. NOFA Newsletter
G. NOFA Direct Market Partners
H. KBH Newsletter
I. Facebook & Twitter

The Primary Shopper Recap

Demographics of the In-State Survey – **Farmers Market**

By Farmers Market Frequency	Total sample (N = 451)	TLC (N = 92)	OLC (N = 220)	RLC (N = 139)
Age				
Under 18	0.00%	0.00%	0.00%	0.00%
18 – 24	2.88%	4.35%	2.73%	2.16%

25 – 34	15.52%	13.04%	18.64%	12.23%
35 – 54	35.92%	32.61%	35.00%	39.57%
55+	45.68%	50.00%	43.64%	46.04%
Gender				
Female	75.61%	76.09%	75.91%	74.82%
Male	22.62%	22.83%	22.73%	22.30%
Prefer not to say	1.77%	1.09%	1.36%	2.88%
Household Size				
1	21.51%	13.04%	25.91%	20.14%
2	45.23%	53.26%	46.36%	38.13%
3	14.19%	18.48%	12.27%	14.39%
4+	19.07%	15.22%	15.45%	27.34%
Household Income				
Below $50,000 / year	37.92%	40.22%	34.09%	42.45%
$50,000 - $100,000 / year	39.25%	39.13%	38.18%	41.01%
$100,001+ / year	22.84%	20.65%	27.73%	16.55%
Education Level				
Partial High School	0.00%	0.00%	0.00%	0.00%
High School	2.00%	0.00%	2.27%	2.88%
Trade School	0.67%	1.09%	0.45%	0.72%
Partial College	12.86%	18.48%	9.55%	14.39%
Bachelor Degree	45.23%	46.74%	44.09%	46.04%
Advanced Degree	39.25%	33.70%	43.64%	35.97%

Demographics of the In-State Survey - **Farm Stand**

By Farm Stand Frequency	Total sample (N = 451)	TLC (N = 76)	OLC (N = 211)	RLC (N = 164)
Age				
Under 18	0.00%	0.00%	0.00%	0.00%
18 – 24	2.88%	0.00%	2.84%	4.27%
25 – 34	15.52%	13.16%	15.64%	16.46%
35 – 54	35.92%	32.89%	36.02%	37.20%
55+	45.68%	53.95%	45.50%	42.07%
Gender				
Female	75.61%	84.21%	70.62%	78.05%
Male	22.62%	11.84%	27.49%	21.34%
Prefer not to say	1.77%	3.95%	1.89%	0.61%
Household Size				

1 2 3 4+	21.51% 45.23% 14.19% 19.07%	19.74% 51.32% 13.16% 15.79%	20.85% 45.50% 13.74% 19.91%	23.17% 42.07% 15.24% 19.51%
Household Income Below $50,000 / year $50,000 - $100,000 / year $100,001+ / year	 37.92% 39.25% 22.84%	 34.21% 43.42% 22.37%	 35.07% 42.18% 22.75%	 43.29% 33.54% 23.17%
Education Level Partial High School High School Trade School Partial College Bachelor Degree Advanced Degree	 0.00% 2.00% 0.67% 12.86% 45.23% 39.25%	 0.00% 1.32% 1.32% 14.47% 44.74% 38.16%	 0.00% 1.90% 0.47% 10.90% 45.97% 40.76%	 0.00% 2.44% 0.61% 14.63% 44.51% 37.80%

Demographics of the In-State Survey - **CSA**

By CSA Frequency	Total sample (N = 451)	TLC (n = 33)	OLC (n = 103)	RLC (n = 315)
Age Under 18 18 – 24 25 – 34 35 – 54 55+	 0.00% 2.88% 15.52% 35.92% 45.68%	 0.00% 0.00% 12.12% 42.42% 45.45%	 0.00% 2.91% 23.30% 36.89% 36.89%	 0.00% 3.17% 13.33% 34.92% 48.57%
Gender Female Male Prefer not to say	 75.61% 22.62% 1.77%	 90.91% 9.09% 0.00%	 82.52% 12.62% 4.85%	 71.75% 27.30% 0.95%
Household Size 1 2 3 4+	 21.51% 45.23% 14.19% 19.07%	 27.27% 45.45% 9.09% 18.18%	 16.50% 42.72% 17.48% 23.30%	 22.54% 46.03% 13.65% 17.78%
Household Income Below $50,000 / year $50,000 - $100,000 / year $100,001+ / year	 37.92% 39.25% 22.84%	 36.36% 30.30% 33.33%	 33.98% 41.75% 24.27%	 39.37% 39.37% 21.27%

Education Level				
Partial High School	0.00%	0.00%	0.00%	0.00%
High School	2.00%	0.00%	1.94%	2.22%
Trade School	0.67%	0.00%	0.97%	0.63%
Partial College	12.86%	18.18%	3.88%	15.24%
Bachelor Degree	45.23%	33.33%	49.51%	45.08%
Advanced Degree	39.25%	48.48%	43.69%	36.83%

Results

Segmentation

To provide an in-depth view of the survey results, the results within this section have been segmented in multiple ways. Overall market results are the results for all survey respondents before any segmentation occurred.

Within each direct market, we have segmented the results twice: once by shopping pattern (TLC, OLC, RLC) and once by age and shopping pattern (millennial, Gen X, baby boomer and TLC, OLC, RLC). Segmentation allowed us to review varying factors that might affect how respondents choose to shop.

Segmentation by shopping pattern reveals the trends among those who frequently shop (TLCs) at direct markets versus those who occasionally (OLCs) or rarely shop (RLCs) at direct markets. Segmentation by age and shopping pattern reveal shopping trends among those at different life stages.

See Appendix (p. 132) for a visual representation of the data segmentation.

Question Structure

When determining their top considerations for buying produce, respondents were asked, “When buying local produce, I consider the following variables…” The variable choices were then listed with a scale ranging from strongly agree to strongly disagree. Top considerations were determined by combining the number of respondents who chose strongly agree or agree for each individual variable. For each market, we determined the top considerations by looking at the answers chosen by respondents who had specifically shopped at that direct market in the past 12 months.

Top motivations were determined by asking respondents what would encourage them to shop at each direct market more frequently, and top barriers were determined by asking respondents what prevents them from shopping at each direct market more frequently.

For all questions concerning considerations, motivations, and barriers, respondents were able to choose more than one answer.

Shopping Channel Preferences

Overall Shopping Channel Preferences (non-segmented results)

Respondents were asked to rank their shopping preferences on a scale from one to five, with one being the most preferred and five being the least preferred. We determined the overall ranking of the markets by taking the weighted average of each market's ranked scores.

Weights were applied in reverse. In other words, the respondent's most preferred choice (which they rank as #1) had the largest weight of five, and their least preferred choice (which they rank in the last position) had a weight of one. Therefore, the most preferred choice was the market with the largest weighted average.

See the Appendix (p.133-136) for charts illustrating each channel's individual ranking from respondents.

The results showed that overall co-ops ranked as the most preferred market with a weighted average of 3.43, and CSAs were ranked as the least preferred market with a weighted average of 2.48.

In the table below, the markets are listed in order of most preferred to least preferred for the data as a whole.

Overall Shopping Channel Preference

Choices (Rank)	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred	Weighted Average
Co-op (1)	27.5% (124)	24.6% (111)	20.2% (91)	18.6% (84)	9.1% (41)	**3.43**
Farmers Market (2)	21.3% (96)	25.5% (115)	26.2% (118)	20.4% (92)	6.6% (30)	**3.34**
Farm Stand (3)	14.2% (64)	27.1% (122)	26.8% (121)	22.4% (101)	9.5% (43)	**3.14**

Grocery Store (4)	17.7% (80)	12.6% (57)	16.9% (76)	19.1% (86)	33.7% (152)	**2.62**
CSA (5)	19.7% (89)	10.2% (46)	9.8% (44)	19.3% (87)	41% (185)	**2.48**

Shopping Channel Preference Segmented by Age

We also segmented the data by age (millennials, Generation X, and baby boomers) to determine if age impacted the order of preference. The results showed that market preference was the same for the overall dataset, Gen X shoppers, and baby boomers. However, the preference ranking changed for millennials with CSAs jumping to the third most preferred market and farm stands and grocery stores becoming the fourth and fifth most preferred, respectively.

In the tables below, the markets are listed in order of most preferred to least preferred for each age group.

Millennial Shopping Channel Preferences (N=83)

Choices (Rank)	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred	Weighted Average
Co-op (1)	25.3% (21)	26.5% (22)	16.9% (14)	19.3% (16)	12.1% (10)	**3.34**
Farmers Market (2)	21.7% (18)	21.7% (18)	30.1% (25)	18.1% (15)	8.4% (7)	**3.30**
CSA (3)	26.5% (22)	13.3% (11)	12.1% (10)	16.9% (14)	31.3% (26)	**2.87**
Farm Stand (4)	6% (5)	22.9% (19)	27.7% (23)	31.3% (26)	12.1% (10)	**2.80**
Grocery Store (5)	20.5% (17)	15.7% (13)	13.3% (11)	14.5% (12)	36.1% (30)	**2.70**

Gen X Shopping Channel Preferences (N=162)

Choices (Rank)	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred	Weighted Average
Co-op (1)	29% (47)	17.9% (29)	21% (34)	19.8% (32)	12.4% (20)	**3.31**
Farmers Market (2)	16.1% (26)	32.7% (53)	22.8% (37)	19.8% (32)	8.6% (14)	**3.28**
Farm Stand (3)	16.1% (26)	27.8% (45)	24.1% (39)	21% (34)	11.1% (18)	**3.17**
Grocery Store (4)	21% (34)	11.1% (18)	21% (34)	16.7% (27)	30.3% (49)	**2.76**
CSA (5)	17.9% (29)	10.5% (17)	11.1% (18)	22.8% (37)	37.7% (61)	**2.48**

Baby Boomer Shopping Channel Preferences (N=206)

Choices (Rank)	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred	Weighted Average
Co-op (1)	27.2% (56)	29.1% (60)	20.9% (43)	17.5% (36)	5.3% (11)	**3.55**
Farmers Market (2)	25.2% (52)	21.4% (44)	27.2% (56)	21.8% (45)	4.4% (9)	**3.41**
Farm Stand (3)	16% (33)	28.2% (58)	28.6% (59)	19.9% (41)	7.3% (15)	**3.26**
Grocery Store (4)	14.1% (29)	12.6% (26)	15.1% (31)	22.8% (47)	35.4% (73)	**2.47**
CSA (5)	17.5% (36)	8.7% (18)	8.3% (17)	18% (37)	47.6% (98)	**2.31**

Overall Direct Market Results

Direct Markets Shopping Patterns (non-segmented results)

While only 6.7 percent of respondents hadn't shopped at a direct market within the past year, the overall frequency of attendance at direct markets was lower than expected. Only 49.9 percent of respondents stated they had attended a summer farmers market once per month or more, and that drops to 24.6 percent during the winter season.

The most preferred channel of direct market shopping was summer farmers markets, and farm stands were the second most preferred channel, with 42.4 percent of respondents visiting once per month or more. CSAs were the least preferred with 69.8 percent of respondents stating they did not subscribe at all. During the peak summer season, only 20.6 percent had a CSA subscription.

Question	Response	Percentage
How many times have you shopped at a direct market in the past 12 months?	None	6.7%
How often do you attend a farmers market during the summer?	Monthly or more	49.9%
How often do you attend a farmers market during the winter?	Monthly or more	24.6%
How often do you shop at a farmer stand during the summer?	Monthly or more	42.4%
When do you subscribe to a CSA?	I did not subscribe	69.8%

Direct Market Considerations (non-segmented results)

The top considerations when buying produce across all direct markets were quality of food (98.7 percent), freshness (98.5 percent), and supporting the farmer (94.2 percent). Whether or not a product is labeled as organic had the lowest consideration, with 7.4 percent either marking disagree or strongly disagree for organic label.

Results for question: When buying local produce, I consider the following variables:

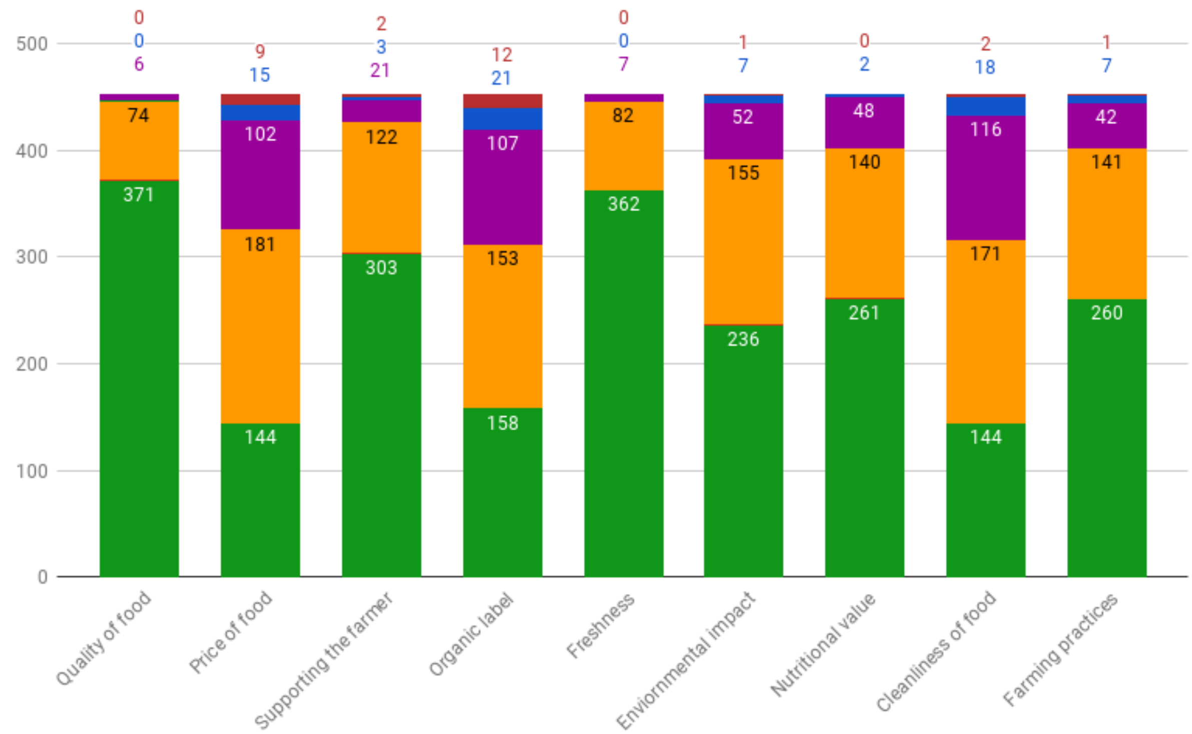


Chart Key	
Green	Strongly Agree
Orange	Agree
Purple	Neutral
Blue	Disagree
Red	Strongly Disagree

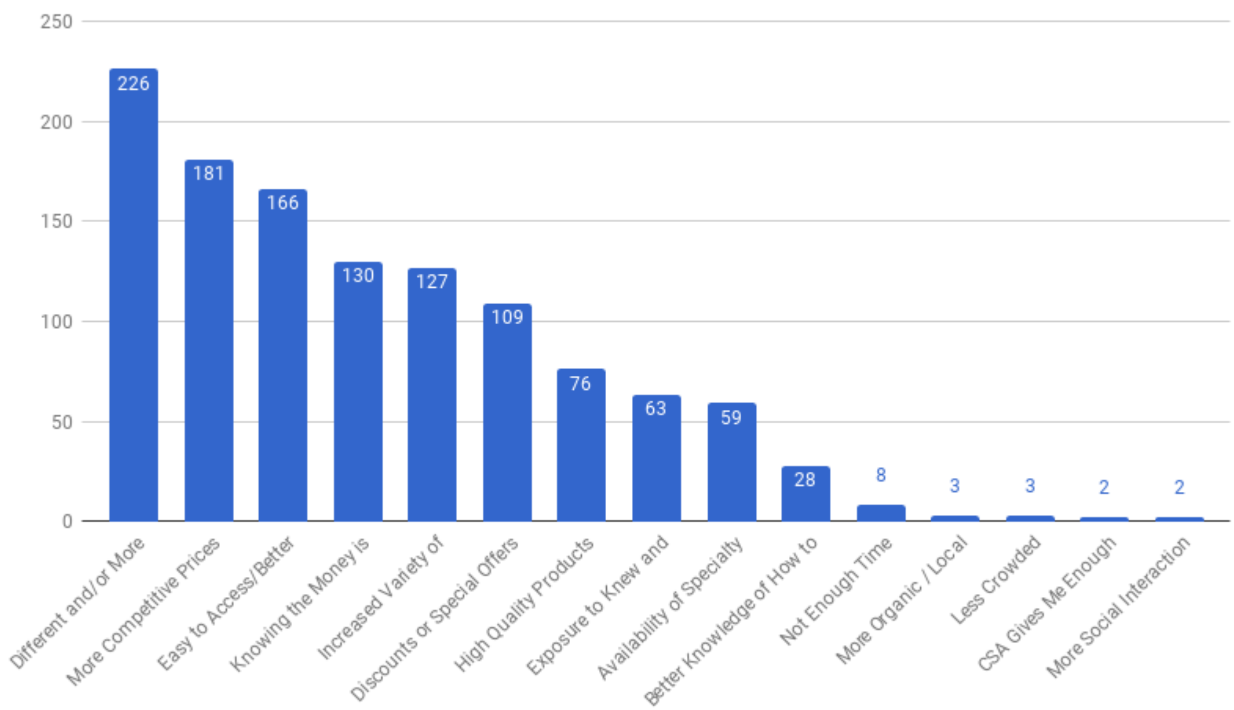
*Numbers in chart indicate number of respondents – not percentages.
**See tables in the Appendix (p. 137-140) for the complete list of considerations.

Direct Market Motivations (non-segmented results)

We looked at each market separately and as a whole. When asked why they shop at direct markets over other locations like grocery stores, respondents chose that they know they are helping farmers (83.8 percent), the 'high-quality' products [available at direct markets] (74.7 percent), and they trust farmers more [than traditional grocery stores] (48.6 percent).

These attributes shift to price and convenience when respondents were specifically questioned about what encourages them to shop at farmers markets. Slightly more than half (50.1 percent) of respondents would be motivated to shop more if there were different and/or more hours, 40.1 percent would be motivated by more competitive prices, and 36.8 percent would shop more if farmers markets were at easy to access/better locations.

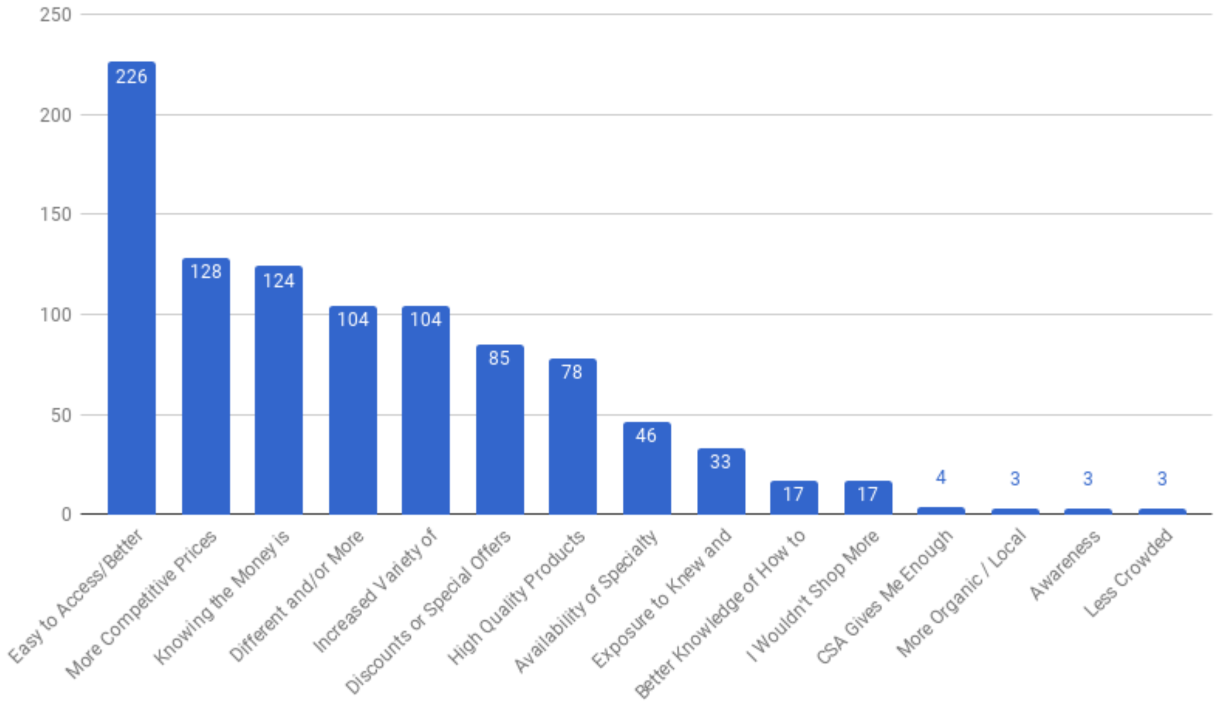
Results for question: What would encourage you to shop at a farmers market more frequently?



*Numbers in chart indicate number of respondents – not percentages.

Farm stands mostly followed suit, with 50.1 percent indicating the importance of an easier to access/better location and 28.4 percent wanting more competitive pricing. Additionally, 27.5 percent of respondents would be motivated to shop more frequently if they knew they were supporting their local farmers.

Results for question: What would encourage you to shop at a farm stands more frequently?

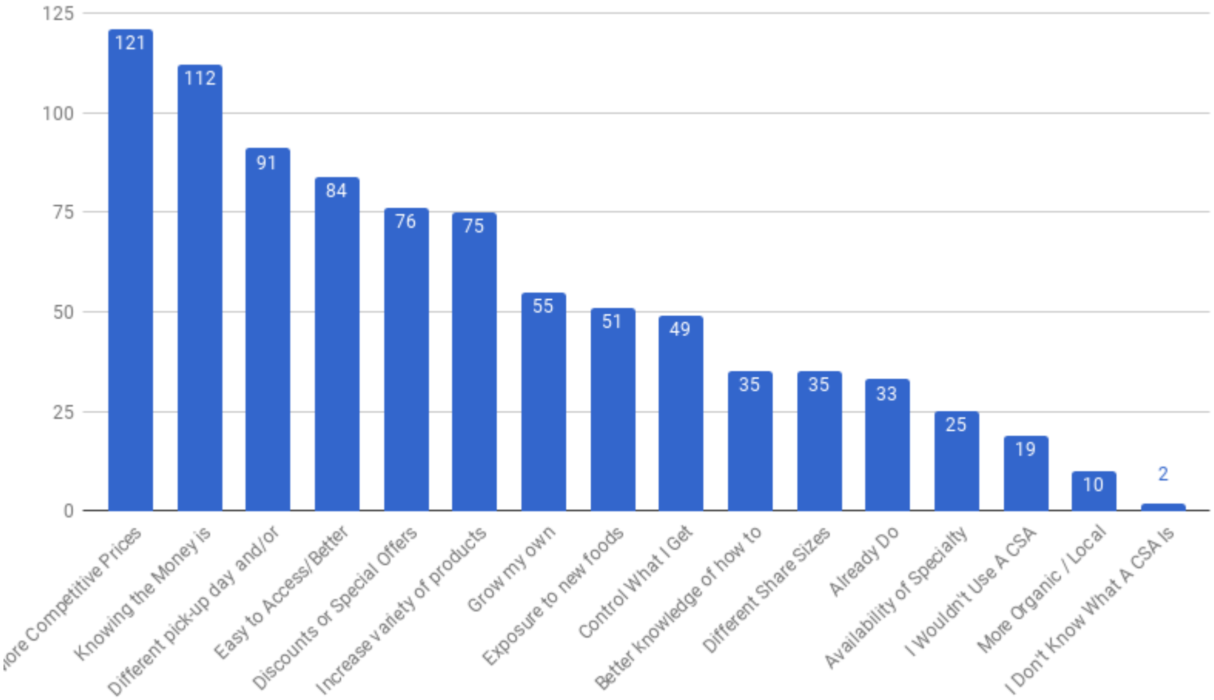


*Numbers in chart indicate number of respondents – not percentages.

Most interestingly, though, were CSAs. For the other two direct markets (farmers markets and farm stands), the majority of respondents filled out the survey using the provided answer choices, while 23.5 percent of the CSA responses were a written form of 'other.' These written responses mostly aligned with answers that were given, yet people felt the need to express their opinion – good and bad - in much more detail. It is our assumption that CSAs elicit a much stronger emotional response.

The top motivations for shopping at CSAs included more competitive prices (26.8 percent), knowing the money is supporting local farmers (24.8 percent), and different pick-up days and/or more hours of operation (20.2 percent). Many of the written-in 'other' answers focused on lack of choice, lack of share sizes or flexibility, and expressed interest in a delivery option.

Results for question: What would encourage you to shop at a CSAs more frequently?



*Numbers in chart indicate number of respondents – not percentages.

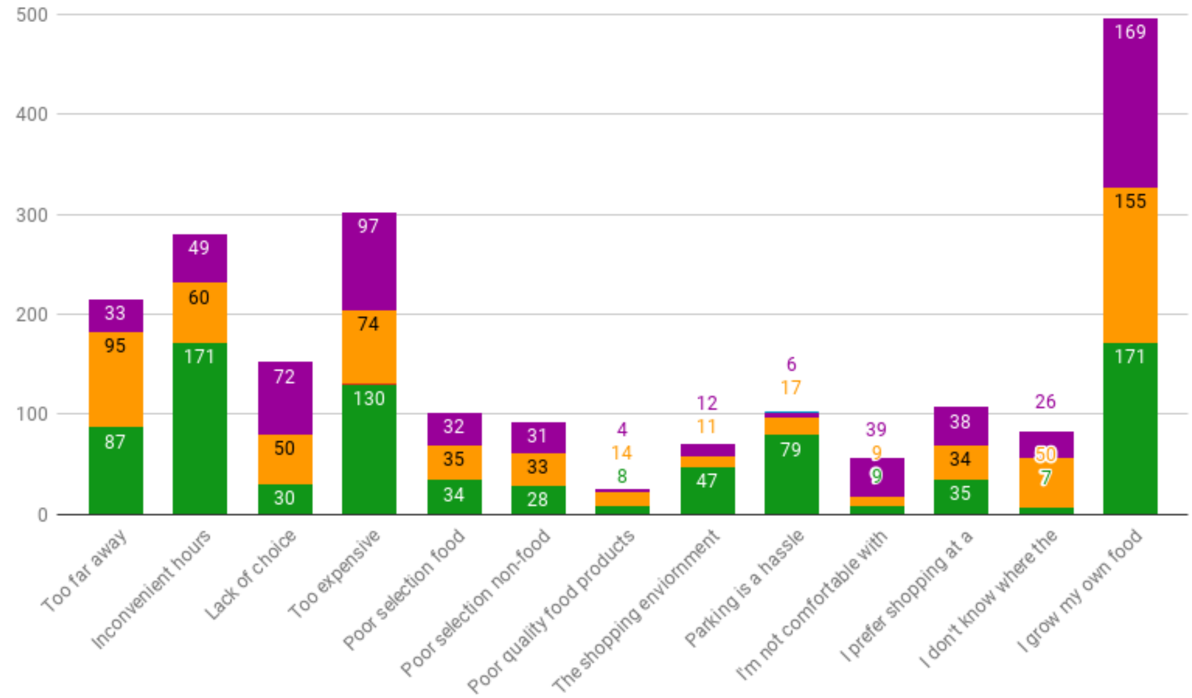
Direct Market Barriers (non-segmented results)

The survey revealed the largest factors preventing consumers from shopping at farmers markets included inconvenient event hours (37.9 percent), they grow their own food (37.9 percent), and it's too expensive (28.8 percent).

The top inhibiting factors for farm stands included "I grow my own food" (34.4% percent), it's too far away (21.1 percent), and too expensive (16.4 percent). These issues are convenience and awareness related.

When asked what prevents them from shopping at CSAs, 37.5 percent of respondents didn't subscribe because they grew their own food, and 21.5 percent said it was too expensive, and 16 percent felt that CSAs did not offer enough choices.

Results for question: What prevents you from shopping more frequently at farmers markets, farm stands, and CSAs?



Key	
Green	Farmers Market
Orange	Farm Stand
Purple	CSA

*Number in chart indicates number of respondents – not percentages.

Farmers Market Segmented Results

Farmers Market Segmented Results by Shopping Pattern

The below results list the considerations, motivations, and barriers respondents experience when shopping at farmers markets in Vermont. The results within this section of the report were determined using the entire dataset of respondents (N=451). The results were then segmented based on respondents' shopping patterns - true local consumers (TLC), occasional local consumers (OLC), and rare local consumers (RLC).

For this section, TLC, OLC, and RLC can be defined as:

TLC: respondents that shop at farmers markets weekly or more than weekly.

OLC: respondents that shop at farmers markets several times per month, monthly, or several times throughout the season.
RLC: respondents that shop at farmers markets rarely or never.

Considerations When Shopping at Farmers Markets

Shopping Pattern Considerations	TLC (N=92)	OLC (N=220)	RLC (N=139)
Quality	100% [92]	98.6% [217]	97.8% [136]
Price	69.8% [64]	71.4% [157]	74.8% [104]
Supporting local farmer	98.9% [91]	95.9% [211]	88.5% [123]
Organic label	67.4% [62]	70.5% [155]	67.6% [94]
Freshness	100% [92]	98.2% [216]	97.8% [136]
Environmental impact	92.4% [85]	88.6% [195]	79.9% [111]
Nutritional value	92.4% [85]	90.5% [199]	84.2% [117]
Cleanliness	76.1% [70]	66.8% [147]	70.5% [98]
Farm practices	93.5% [86]	88.6% [195]	86.3% [120]

- **TLC top considerations:** quality (100 percent), freshness (100 percent), supporting local farmers (98.9 percent)
- **OLC top considerations:** quality (98.6 percent), freshness (98.2 percent), supporting local farmers (95.9 percent)
- **RLC top considerations:** quality (97.8 percent), freshness (97.8 percent), and supporting the local farmers (88.5 percent)

Motivations to Shop at Farmers Markets More Frequently

Shopping Pattern Motivations	TLC (N=92)	OLC (N=220)	RLC (N=139)
Less crowded	0% [0]	0.5% [1]	1.4% [2]
Not enough time	1.1% [1]	3.6% [8]	0.7% [1]
Better knowledge on how to cook the food	5.4% [5]	6.4% [14]	7.2% [10]
High quality	23.9% [22]	16.4% [36]	14.4% [20]
Exposure to new foods	21.7% [20]	15.5% [34]	6.5% [9]
Availability of Specialty Products	17.4% [16]	15.5% [34]	6.5% [9]
Knowing the Money is Supporting a Local Farmer	43.5% [40]	27.7% [61]	21.6% [30]
Discounts or Special Offers	17.4% [16]	29.6% [65]	20.1% [28]
Easy to Access/Better Location	22.8% [21]	34.6% [76]	47.5% [66]
Increased Variety of Products	33.7% [31]	30.5% [67]	17.3% [24]
More Competitive Prices	34.8% [32]	41.4% [91]	40.3% [56]

Different and/or More Hours of Operation	47.8% [44]	55.5% [122]	43.2% [60]

- **TLC top motivations:** different and/or more hours of operation (47.8 percent), knowing the money is supporting local farmers (43.5 percent), more competitive prices (34.8 percent)
- **OLC top motivations:** different and/or more hours of operation (55.5 percent), more competitive prices (41.4 percent), and easy to access/better location (34.6 percent)
- **RLC top motivations:** easy to access/better location (47.5 percent), different and/or more hours of operation (43.2 percent), and more competitive prices (40.3 percent)

Barriers that Prevent Shopping at Farmers Markets More Frequently

Shopping Pattern Barriers	TLC (N=92)	OLC (N=220)	RLC (N=139)
I don't know where the closest one is	0% [0]	0.9% [2]	3.6% [5]
I grow my own food	37.5% [6]	36.2% [17]	18.2% [2]
I prefer shopping at a grocery store	1.1% [1]	3.6% [8]	18.7% [26]
I'm not comfortable with how they work	0% [0]	1.4% [3]	4.3% [6]
Inconvenient hours	19.6% [18]	40.5% [89]	46% [64]
Lack of choice	1.1% [1]	6.8% [15]	10.1% [14]
Parking is a hassle	8.7% [8]	15.5% [34]	26.6% [37]
Poor quality food products	1.1% [1]	0.5% [1]	4.3% [6]
Poor selection food products	3.3% [3]	5.9% [13]	13% [18]
Poor selection non-food products	6.5% [6]	7.3% [16]	4.3% [6]
The shopping environment is not comfortable	2.2% [2]	7.7% [17]	20.1% [28]
Too expensive	13% [12]	28.6% [63]	39.6% [55]
Too far away	7.6% [7]	16.8% [37]	30.9% [43]

- **TLC top barriers:** I grow my own food (37.5 percent), inconvenient hours (19.6 percent), too expensive (13 percent)
- **OLC top barriers:** Inconvenient hours (40.5 percent), I grow my own food (36.2 percent), too expensive (28.6 percent)
- **RLC top barriers:** Inconvenient hours (46 percent), too expensive (39.6 percent), too far away (30.9 percent)

Farmers Markets Segmented Results by Age and Shopping Pattern

The below results list the considerations, motivations, and barriers respondents experience when shopping at farmers markets in Vermont. The results within this section of the report were determined using a dataset of respondents (N=373) who indicated they had shopped at a farmers market within the past 12 months. The results were then segmented based on respondents' age (millennials, generation X, and baby boomers) and shopping patterns - true local consumers (TLC), occasional local consumers (OLC), and rare local consumers (RLC).

For this section, TLC, OLC, and RLC can be defined as:

TLC: respondents that shop at farmers markets weekly or more than weekly.
OLC: respondents that shop at farmers markets several times per month, monthly, or several times throughout the season.
RLC: respondents that shop at farmers markets rarely.

Millennials (Age range: 18-35)

Considerations When Shopping at Farmers Markets

Millennial Considerations	TLC (N=16)	OLC (N=47)	RLC (N=11)
Quality	100% [16]	97.9% [46]	100% [11]
Price	50% [8]	85.1% [40]	81.8% [9]
Supporting local farmer	100% [4]	91.5% [20]	90.9% [10]
Organic label	62.5% [10]	63.8% [30]	81.8% [9]
Freshness	100% [16]	93.6% [44]	100% [11]
Environmental impact	100% [16]	87.3% [41]	72.7% [8]
Nutritional value	93.8% [15]	87.2% [41]	63.6% [7]
Cleanliness	68.8% [11]	66% [31]	54.5% [6]
Farm practices	100% [16]	87.2% [41]	90.9% [10]

- **TLC top considerations:** quality (100 percent), supporting local farmers (100 percent), freshness (100 percent), environmental impact (100 percent), and farming practices (100 percent)
- **OLC top considerations:** quality (97.9 percent), freshness (93.6 percent), and supporting local farmers (91.5 percent)
- **RLC top considerations:** quality (100 percent), freshness (100 percent), supporting the local farmers (90.9 percent), and farming practices (90.9 percent)

Motivations to Shop at Farmers Markets More Frequently

Millennial Motivations	TLC (N=16)	OLC (N=47)	RLC (N=11)
Less crowded	0% [0]	2.1% [1]	0% [0]
Not enough time	0% [0]	6.4% [3]	0% [0]
Better knowledge on how to cook the food	12.5% [2]	6.4% [3]	9.1% [1]
High quality	18.8% [3]	12.8% [6]	0% [0]
Exposure to new foods	37.5% [6]	10.6% [5]	9.1% [1]

Availability of Specialty Products	18.8% [3]	17% [8]	9.1% [1]
Knowing the Money is Supporting a Local Farmer	50% [8]	19.2% [9]	18.2% [2]
Discounts or Special Offers	25% [4]	29.8% [14]	36.4% [4]
Easy to Access/Better Location	43.8% [7]	31.9% [15]	36.4% [4]
Increased Variety of Products	37.5% [6]	31.9% [15]	18.2% [2]
More Competitive Prices	37.5% [6]	38.3% [18]	54.6% [6]
Different and/or More Hours of Operation	37.5% [6]	51.1% [24]	45.5% [5]

- **TLC top motivations:** Knowing the money is supporting a local farmer (50 percent), easy to access/better location (43.8 percent), increased variety of products (37.5 percent), more competitive prices (37.5 percent), and different/more hours of operation (37.5 percent)
- **OLC top motivations:** Different and/or more hours of operations (51.1 percent), more competitive prices (38.3 percent), easy to access/better location (31.9 percent), and increased variety of product (31.9 percent)
- **RLC top motivations:** more competitive prices (54.6 percent), different and/or more hours of operation (45.5 percent), discounts or special offers (36.4 percent), and easy to access/better location (36.4 percent)

Barriers that Prevent Shopping at Farmers Markets More Frequently

Millennial Barriers	TLC (N=16)	OLC (N=47)	RLC (N=11)
I don't know where the closest one is	0% [0]	4.3% [2]	27.3% [3]
I grow my own food	37.5% [6]	36.2% [17]	18.2% [2]
I prefer shopping at a grocery store	0% [0]	10.6% [5]	18.2% [2]
I'm not comfortable with how they work	0% [0]	6.4% [3]	9.1% [1]
Inconvenient hours	18.8% [3]	40.4% [19]	63.6% [7]
Lack of choice	0% [0]	10.6% [5]	0% [0]
Parking is a hassle	6.3% [1]	25.5% [12]	18.2% [2]
Poor quality food products	0% [0]	0% [0]	9.1% [1]
Poor selection food products	0% [0]	12.8% [6]	9.1% [1]
Poor selection non-food products	0% [0]	8.5% [4]	0% [0]
The shopping environment is not comfortable	6.3% [1]	10.6% [5]	27.3% [3]
Too expensive	25% [4]	34% [16]	27.3% [3]
Too far away	12.5% [2]	14.9% [7]	37.4% [4]

- **TLC top barriers:** I grow my own food (37.5 percent), too expensive (25 percent), inconvenient hours (18.8 percent)
- **OLC top barriers:** Inconvenient hours (40.4 percent), I grow my own food (36.2 percent), too expensive (34 percent)

- **RLC top barriers:** Inconvenient hours (63.6 percent), too far away (37.4 percent) shopping environment is uncomfortable (27.3 percent), I don't know where the closest one is (27.3 percent), too expensive (27.3 percent)

Gen X (Age range: 36-54)

Considerations When Shopping at Farmers Markets

Gen X Considerations	TLC (N=28)	OLC (N=75)	RLC (N=34)
Quality	100% [28]	100% [75]	97.1% [33]
Price	78.6% [22]	68% [51]	82.4% [28]
Supporting local farmer	96.4% [27]	97.3% [73]	97.1% [33]
Organic label	71.4% [20]	62.7% [47]	58.8% [20]
Freshness	100% [28]	100% [75]	97.1% [33]
Environmental impact	92.9% [26]	86.7% [65]	76.5% [26]
Nutritional value	89.3% [25]	89.3% [67]	76.5% [26]
Cleanliness	82.1% [23]	60% [55]	76.5% [26]
Farm practices	92.9% [26]	86.7% [65]	88.2% [30]

- **TLC top considerations:** quality (100 percent), freshness (100 percent), and supporting the local farmer (96.4 percent)
- **OLC top considerations:** quality (100 percent), freshness (100 percent), and supporting the local farmer (97.3 percent)
- **RLC top considerations:** quality (97.1 percent), supporting the local farmer (97.1 percent), and freshness (97.1 percent)

Motivations to Shop at Farmers Markets More Frequently

Gen X Motivations	TLC (N=28)	OLC (N=75)	RLC (N=34)
Less crowded	0% [0]	1.3% [1]	2.9% [1]
Not enough time	3.6% [1]	8% [6]	0% [0]
Better knowledge on how to cook the food	7.1% [2]	9.3% [7]	8.8% [3]
High quality	17.9% [5]	8% [6]	8.9% [3]
Exposure to new foods	25% [7]	18.7% [14]	11.8% [4]
Availability of specialty products	14.3% [4]	18.7% [14]	0% [0]
Knowing the money is supporting a local farmer	42.9% [12]	26.7% [20]	11.8% [4]
Discounts or special offers	25% [7]	32% [24]	17.7% [6]
Easy to access/better location	14.3% [4]	29.3% [22]	58.8% [20]
Increased variety of products	35.7% [10]	32% [24]	26.5% [9]
More competitive prices	46.4% [13]	42.7% [32]	35.3% [12]
Different and/or more hours of operation	39.3% [11]	58.7% [44]	70.6% [24]

- **TLC top motivations:** more competitive prices (46.4 percent), knowing the money is supporting a local farmer (42.9 percent), and different and/or more hours of operation (39.3 percent)
- **OLC top motivations:** different and/or more hours of operation (58.7 percent), more competitive prices (42.7 percent), and discounts or special offers (32 percent)
- **RLC top motivations:** different and/or more hours of operation (70.6 percent), easy to access/better location (58.8 percent), and more competitive prices (35.3 percent)

Barriers that Prevent Shopping at Farmers Markets More Frequently

Gen X Barriers	TLC (N=28)	OLC (N=75)	RLC (N=34)
I don't know where the closest one is	0% [0]	0% [0]	2.9% [1]
I grow my own food	32.1% [9]	28% [21]	29.4% [10]
I prefer shopping at a grocery store	3.6% [1]	4% [3]	11.8% [4]
I'm not comfortable with how they work	0% [0]	4% [3]	0% [0]
Inconvenient hours	10.7% [3]	52% [39]	41.2% [14]
Lack of choice	0% [0]	6.7% [5]	11.8% [4]
Parking is a hassle	3.6% [1]	16% [12]	23.5% [8]
Poor quality food products	0% [0]	0% [0]	2.9% [1]
Poor selection food products	3.6% [1]	5.3% [4]	14.7% [5]
Poor selection non-food products	7.1% [2]	9.3% [7]	8.8% [3]
The shopping environment is not comfortable	0% [0]	13.3% [10]	14.7% [5]
Too expensive	14.3% [4]	33.3% [25]	29.4% [10]
Too far away	10.7% [3]	18.7% [14]	38.2% [13]

- **TLC top barriers:** I grow my own food (32.1 percent), too expensive (14.3 percent), inconvenient hours (10.7 percent), and too far away (10.7 percent)
- **OLC top barriers:** inconvenient hours (52 percent), too expensive (33.3 percent), and I grow my own food (28 percent)
- **RLC top barriers:** inconvenient hours (41.2 percent), too far away (38.2 percent), too expensive (29.4 percent), and I grow my own food (29.4 percent)

Baby Boomers (Age range: 55+)

Considerations When Shopping at Farmers Markets

Baby Boomer Considerations	TLC (N=45)	OLC (N=94)	RLC (N=23)
Quality	100% [45]	97.9% [92]	100% [23]
Price	71.1% [32]	66% [62]	56.5% [13]

Supporting local farmer	100% [45]	97.9% [92]	95.7% [22]
Organic label	64.5% [29]	80.9% [76]	82.6% [19]
Freshness	100% [45]	98.9% [93]	100% [23]
Environmental impact	88.9% [40]	91.5% [86]	95.7% [22]
Nutritional value	93.3% [42]	92.6% [87]	95.7% [22]
Cleanliness	75.6% [34]	71.3% [67]	60.9% [14]
Farm practices	91.1% [41]	91.5% [86]	100% [23]

- **TLC top considerations:** quality (100 percent), supporting the local farmer (100 percent), and freshness (100 percent)
- **OLC top considerations:** freshness (98.9 percent), quality (97.9 percent), and supporting the local farmer (97.9 percent)
- **RLC top considerations:** quality (100 percent), freshness (100 percent), farming practices (100 percent)

Motivations to Shop at Farmers Markets More Frequently

Baby Boomer Motivations	TLC (N=45)	OLC (N=94)	RLC (N=23)
Less crowded	0% [0]	1.1% [1]	4.4% [1]
Not enough time	2.2% [1]	1.1% [1]	0% [0]
Better knowledge on how to cook the food	2.2% [1]	4.3% [4]	4.4% [1]
High quality	28.9% [13]	25.5% [24]	17.4% [4]
Exposure to new foods	13.3% [6]	16% [15]	8.7% [2]
Availability of specialty Products	20% [9]	14.9% [14]	4.4% [1]
Knowing the Money is Supporting a Local Farmer	46.7% [21]	34% [32]	30.4% [7]
Discounts or special Offers	15.6% [7]	24.5% [23]	26.1% [6]
Easy to Access/Better Location	20% [9]	39.4% [37]	47.8% [11]
Increased Variety of Products	35.6% [16]	27.7% [26]	17.4% [4]
More competitive prices	35.6% [16]	41.5% [39]	39.1% [9]
Different and/or more hours of operation	56.8% [26]	50% [46]	43.5% [10]

- **TLC top motivations:** different and/or more hours of operation (56.8 percent), knowing the money is supporting a local farmer (46.7 percent), increased variety of product (35.6 percent), and more competitive prices (35.6 percent)
- **OLC top motivations:** different and/or more hours of operation (50 percent), more competitive prices (41.5 percent), and easy to access/better location (39.4 percent)
- **RLC top motivations:** easy to access/better location (47.8 percent), different and/or more hours of operation (43.5 percent), more competitive prices (39.1 percent)

Barriers that Prevent Shopping at Farmers Markets More Frequently

Baby Boomer Barriers	TLC (N=45)	OLC (N=94)	RLC (N=23)
I don't know where the closest one is	0% [0]	2.1% [2]	0% [0]
I grow my own food	37.8% [17]	41.5% [39]	60.9% [14]
I prefer shopping at a grocery store	0% [0]	0% [0]	4.4% [1]
I'm not comfortable with how they work	0% [0]	0% [0]	0% [0]
Inconvenient hours	22.2% [10]	34% [32]	13% [3]
Lack of choice	2.2% [1]	5.3% [5]	4.3% [1]
Parking is a hassle	13.3% [6]	9.6% [9]	26.1% [6]
Poor quality food products	2.2% [1]	1.1% [1]	0% [0]
Poor selection food products	4.4% [2]	3.2% [3]	8.7% [2]
Poor selection non-food products	6.7% [3]	4.3% [4]	0% [0]
The shopping environment is not comfortable	0% [0]	2.1% [2]	13% [3]
Too expensive	8.9% [4]	19.2% [18]	30.4% [7]
Too far away	2.2% [1]	17% [16]	26.1% [6]

- **TLC top barriers:** I grow my own food (37.8 percent), inconvenient hours (22.2 percent), and parking is a hassle (13.3 percent)
- **OLC top barriers:** I grow my own food (41.5 percent), inconvenient hours (34 percent), and too expensive (19.2 percent)
- **RLC top barriers:** I grow my own food (60.9 percent), too expensive (30.4 percent), parking is a hassle (26.1 percent), and too far away (26.1 percent)

Farm Stands Segmented Results

Farm Stands Segmented Results by Shopping Pattern

The below results list the considerations, motivations, and barriers respondents experience when shopping at farm stands in Vermont. The results within this section of the report were determined using the entire dataset of respondents (N=451). The results were then segmented based on respondents' shopping patterns - true local consumers (TLC), occasional local consumers (OLC), and rare local consumers (RLC).

For this section, TLC, OLC, and RLC can be defined as:

TLC: respondents that shop at farm stands weekly or more than weekly.
OLC: respondents that shop at farm stands several times per month, monthly, or several times throughout the season.
RLC: respondents that shop at farm stands rarely or never.

Considerations When Shopping at Farm Stands

Shopping Pattern Considerations	TLC (N=76)	OLC (N=211)	RLC (N=164)
Quality	100% [76]	99.1% [209]	97.6% [160]
Price	57.9% [44]	73.9% [156]	76.2% [125]
Supporting local farmer	98.7% [75]	95.7% [202]	90.2% [148]
Organic label	77.6% [59]	70.1% [148]	63.4% [104]
Freshness	100% [76]	99.1% [209]	97% [159]
Environmental impact	89.5% [68]	87.7% [185]	84.2% [138]
Nutritional value	93.4% [71]	88.2% [186]	87.8% [144]
Cleanliness	79% [60]	68.7% [145]	67.1% [110]
Farm practices	93.4% [71]	91% [192]	84.2% [138]

- **TLC top considerations:** quality (100 percent), freshness (100 percent), and supporting local farmers (98.7percent)
- **OLC top considerations:** quality (99.1 percent), freshness (99.1 percent), and supporting local farmer (95.7 percent)
- **RLC top considerations:** quality (97.6 percent), freshness (97 percent), and supporting local farmers (90.2 percent)

Motivations to Shop at Farm Stands More Frequently

Shopping Pattern Motivations	TLC (N=76)	OLC (N=211)	RLC (N=164)
Less crowded	0% [0]	0% [0]	0% [0]
Not enough time	0% [0]	1% [2]	0.6% [1]
Better knowledge on how to cook the food	4% [3]	2.4% [5]	5.5% [9]
High quality	22.4% [17]	16.6% [35]	15.2% [25]
Exposure to new foods	13.2% [10]	7.1% [15]	4.9% [8]
Availability of Specialty Products	11.8% [9]	12.8% [27]	6.1% [10]
Knowing the Money is Supporting a Local Farmer	36.8% [28]	29.9% [63]	20.1% [33]
Discounts or Special Offers	19.7% [15]	19% [40]	18.3% [30]
Easy to Access/Better Location	32.9% [25]	48.8% [103]	56.1% [92]
Increased Variety of Products	25% [19]	29.4% [62]	12.8% [21]
More Competitive Prices	29% [22]	26.1% [55]	30.5% [50]
Different and/or More Hours of Operation	34.2% [26]	24.2% [51]	17.1% [28]

- **TLC top motivations:** knowing the money is supporting a local farmer (36.8 percent), different and/or more hours of operation (34.2 percent), and easy to access/better location (32.9 percent)
- **OLC top motivations:** easy to access/better location (48.8 percent), knowing the money is supporting a local farmer (29.9 percent), and increased variety of products (29.4 percent)
- **RLC top motivations:** easy to access/better location (56.1 percent), more competitive prices (30.5 percent), knowing the money is supporting a local farmer (20.1 percent)

Barriers that Prevent Shopping at Farm Stands More Frequently

Farm Stand Barriers	TLC (n = 76)	OLC (n = 211)	RLC (n = 164)
Too Far Away	6.6% [5]	19.4% [41]	29.9% [49]
Inconvenient Hours	11.8% [9]	12.3% [26]	15.2% [25]
Lack of Choice	7.9% [6]	9% [19]	15.2% [25]
Too Expensive	14.5% [11]	11.9% [25]	23.2% [38]
Poor Selection of Food Products	7.9% [6]	4.7% [10]	11.6% [19]
Poor Selection of Non-Food Products	11.8% [9]	6.2% [13]	6.7% [11]
Poor Quality of Food Products	1.3% [1]	1.9% [4]	5.5% [9]
The Shopping Environment Isn't Comfortable	0% [0]	1% [2]	5.5% [9]
Parking Is a Hassle	2.6% [2]	2.4% [5]	6.1% [10]
I'm Not Comfortable with How They Work	0% [0]	1.4% [3]	3.7% [6]
I Prefer Grocery Stores	1.3% [1]	5.7% [12]	12.8% [21]
I Don't Know Where the Closest One Is	1.3% [1]	6.6% [14]	21.3% [35]
I Grow My Own Food	34.2% [26]	34.1% [72]	34.8% [57]

- **TLC top barriers:** I grow my own food (34.2 percent), too expensive (14.5 percent), inconvenient hours (11.8 percent), and poor selection of non-food products (11.8 percent)
- **OLC top barriers:** I grow my own food (34.1 percent), too far away (19.4 percent), and inconvenient hours (12.3 percent)
- **RLC top barriers:** I grow my own food (34.8 percent), too far away (29.9 percent), and too expensive (23.2 percent)

Farm Stands Segmented Results by Age and Shopping Pattern

The below results list the considerations, motivations, and barriers respondents experience when shopping at farm stands in Vermont. The results within this section of the report were determined using a dataset of respondents (N=324) who indicated they had shopped at a farm stand within the past 12 months. The results were then segmented based on respondents' age (millennials, generation X, and baby boomers) and shopping patterns - true local consumers (TLC), occasional local consumers (OLC), and rare local consumers (RLC).

For this section, TLC, OLC, and RLC can be defined as:

TLC: respondents that shop at farm stands weekly or more than weekly.
OLC: respondents that shop at farm stands several times per month, monthly, or several times throughout the season.
RLC: respondents that shop at farm stands rarely.

Millennials (Age range: 18-34)

Considerations When Shopping at Farm Stands

Millennial Considerations	TLC (N=9)	OLC (N=37)	RLC (N=9)
Quality	100% [9]	97.3% [36]	100% [9]
Price	77.8% [7]	78.4% [29]	77.8% [7]
Supporting local farmer	100% [9]	94.6% [35]	77.8% [7]
Organic label	44.4% [4]	64.9% [24]	66.7% [6]
Freshness	100% [9]	97.3% [36]	77.8% [7]
Environmental impact	88.9% [8]	83.8% [31]	88.9% [8]
Nutritional value	100% [9]	83.8% [31]	66.7% [6]
Cleanliness	55.6% [5]	70.3% [26]	66.7% [6]
Farm practices	100% [9]	86.5% [32]	100% [9]

- **TLC top considerations:** quality (100 percent), supporting the local farmers (100 percent), freshness (100 percent), nutritional value (100 percent), and farming practices (100 percent)
- **OLC top considerations:** quality (97.3 percent), freshness (97.3 percent), and supporting the local farmer (94.6 percent)
- **RLC top considerations:** quality (100 percent), farming practices (100 percent), and environmental impact (88.9 percent)

Motivations to Shop at Farm Stands More Frequently

Millennial Motivations	TLC (N=9)	OLC (N=37)	RLC (N=9)
Less crowded	0% [0]	0% [0]	0% [0]
Not enough time	0% [0]	2.7% [1]	0% [0]
Better knowledge on how to cook the food	0% [0]	10.8% [4]	11.1% [1]
High quality	0% [0]	13.5% [5]	0% [0]
Exposure to new foods	0% [0]	8.1% [3]	0% [0]
Availability of Specialty Products	0% [0]	16.2% [6]	0% [0]
Knowing the Money is Supporting a Local Farmer	11.1% [1]	21.6% [8]	0% [0]
Discounts or Special Offers	11.1% [1]	29.7% [11]	22.2% [2]
Easy to Access/Better Location	22.2% [2]	54.1% [20]	55.6% [5]
Increased Variety of Products	44.4% [4]	29.7% [11]	22.2% [2]
More Competitive Prices	44.4% [4]	18.9% [7]	22.2% [2]
Different and/or More Hours of Operation	44.4% [4]	37.8% [14]	22.2% [2]

- **TLC top motivations:** Increased variety of product (44.4 percent), more competitive prices (44.4 percent), and different and/or more hours of operation (44.4 percent)
- **OLC top motivations:** easy to access/better location (54.1 percent), different and/or more hours of operation (37.8 percent), discounts or special offers (29.7 percent), and increased variety of product (29.7 percent)
- **RLC top motivations:** easy to access/better location (55.6 percent), discounts or special offers (22.2 percent), increased variety of product (22.2 percent), more competitive prices (22.2 percent), and different/more hours of operation (22.2 percent)

Barriers that Prevent Shopping at Farm Stands More Frequently

Millennial Barriers	TLC (N=9)	OLC (N=37)	RLC (N=9)
I don't know where the closest one is	0% [0]	16.2% [6]	33.3% [3]
I grow my own food	44.4% [4]	32.4% [12]	55.6% [5]
I prefer shopping at a grocery store	11.1% [1]	5.4% [2]	22.2% [2]
I'm not comfortable with how they work	0% [0]	5.4% [2]	0% [0]
Inconvenient hours	44.4% [4]	21.6% [8]	22.2% [2]
Lack of choice	22.2% [2]	10.8% [4]	22.2% [2]
Parking is a hassle	0% [0]	8.1% [3]	22.2% [2]
Poor quality food products	0% [0]	0% [0]	0% [0]
Poor selection food products	0% [0]	5.4% [2]	11.1% [1]
Poor selection non-food products	11.1% [1]	13.5% [5]	11.1% [1]
The shopping environment is not comfortable	0% [0]	0% [0]	22.2% [2]
Too expensive	33.3% [3]	13.5% [5]	33.3% [3]

Too far away	11.1% [1]	24.3% [9]	44.4% [4]

- **TLC top barriers:** I grow my own food (44.4 percent), inconvenient hours (44.4 percent), and too expensive (33.3 percent)
- **OLC top barriers:** I grow my own food (32.4 percent), too far away (24.3 percent), and inconvenient hours (21.6 percent)
- **RLC top barriers:** I grow my own food (55.6 percent), too far away (44.4 percent), I don't know where the closest one is (33.3 percent), and too expensive (33.3 percent)

Gen X (Age range: 35-54)

Considerations When Shopping at Farm Stands

Gen X Considerations	TLC (N=24)	OLC (N=72)	RLC (N=18)
Quality	100% [24]	98.6% [71]	100% [28]
Price	62.5% [15]	75% [54]	83.3% [15]
Supporting local farmer	95.8% [23]	98.6% [71]	100% [18]
Organic label	83.3% [20]	62.5% [45]	50% [9]
Freshness	100% [24]	98.6% [71]	100% [18]
Environmental impact	87.5% [21]	88.9% [64]	88.9% [16]
Nutritional value	91.7% [22]	86.1% [62]	83.3% [15]
Cleanliness	79.2% [19]	61.1% [44]	72.2% [13]
Farm practices	95.8% [23]	91.7% [66]	88.9% [16]

- **TLC top considerations:** quality (100 percent), freshness (100 percent), supporting the local farmer (95.8 percent), and farming practices (95.8 percent)
- **OLC top considerations:** quality (98.6 percent), supporting the local farmer (98.6 percent), and freshness (98.6 percent)
- **RLC top considerations:** quality (100 percent), supporting the local farmer (100 percent), and freshness (100 percent)

Motivations to Shop at Farm Stands More Frequently

Gen X Motivations	TLC (N=24)	OLC (N=72)	RLC (N=18)
Less crowded	0% [0]	0% [0]	0% [0]
Not enough time	4.2% [1]	4.2% [3]	5.6% [1]
Better knowledge on how to cook the food	0% [0]	1.4% [1]	0% [0]
High quality	29.2% [7]	11.1% [8]	11.1% [2]
Exposure to new foods	20.8% [5]	8.3% [6]	5.6% [1]
Availability of Specialty Products	16.7% [4]	13.9% [10]	5.6% [1]
Knowing the Money is Supporting a Local Farmer	41.7% [10]	23.6% [17]	27.8% [5]
Discounts or Special Offers	25% [6]	16.7% [12]	22.2% [4]
Easy to Access/Better Location	45.8% [11]	48.6% [35]	66.7% [12]

Increased Variety of Products	37.5% [9]	36.1% [26]	38.9% [7]
More Competitive Prices	33.3% [8]	25% [18]	22.2% [4]
Different and/or More Hours of Operation	50% [12]	25% [18]	5.6% [1]

- **TLC top motivations:** different and/or more hours of operation (50 percent), easy to access/better location (45.8 percent), and knowing the money is supporting a local farmer (41.7 percent)
- **OLC top motivations:** easy to access/better location (48.6 percent), increased variety of product (36.1 percent), more competitive prices (25 percent), and different and/or more hours of operations (25 percent)
- **RLC top motivations:** easy to access/better location (66.7 percent), increased variety of product (38.9 percent), and knowing the money is supporting a local farmer (27.8 percent)

Barriers that Prevent Shopping at Farm Stands More Frequently

Gen X Barriers	TLC (N=24)	OLC (N=72)	RLC (N=18)
I don't know where the closest one is	0% [0]	4.2% [3]	16.7% [3]
I grow my own food	33.3% [8]	33.3% [24]	50% [9]
I prefer shopping at a grocery store	0% [0]	6.9% [5]	5.6% [1]
I'm not comfortable with how they work	0% [0]	1.4% [1]	0% [0]
Inconvenient hours	12.5% [3]	13.9% [10]	11.1% [2]
Lack of choice	12.5% [3]	11.1% [8]	22.2% [4]
Parking is a hassle	4.2% [1]	1.4% [1]	0% [0]
Poor quality food products	4.2% [1]	4.2% [3]	5.6% [1]
Poor selection food products	20.8% [5]	2.8% [2]	11.1% [2]
Poor selection non-food products	12.5% [3]	4.2% [3]	5.6% [1]
The shopping environment is not comfortable	0% [0]	1.4% [1]	5.6% [1]
Too expensive	12.5% [3]	13.9% [10]	22.2% [4]
Too far away	8.3% [2]	23.6% [17]	27.8% [5]

- **TLC top barriers:** I grow my own food (33.3 percent) and poor selection of food products (20.8 percent)
- **OLC top barriers:** I grow my own food (33.3 percent), too far away (23.6 percent), inconvenient hours (13.9 percent), and too expensive (13.9 percent)
- **RLC top barriers:** I grow my own food (50 percent), too far away (27.8 percent), too expensive (22.2 percent), and lack of choice (22.2 percent)

Baby Boomers (55+)

Considerations When Shopping at Farm Stands

Baby Boomer Considerations	TLC (N=39)	OLC (N=88)	RLC (N=28)
Quality	100% [39]	100% [88]	96.4% [27]
Price	48.7% [19]	73.9% [65]	71.4% [20]
Supporting local farmer	100% [39]	94.3% [83]	92.9% [26]
Organic label	82.1% [33]	77.3% [68]	75% [21]
Freshness	100% [39]	100% [88]	100% [28]
Environmental impact	92.3% [36]	88.6% [78]	96.4% [27]
Nutritional value	94.9% [37]	89.8% [79]	100% [28]
Cleanliness	82.1% [32]	64.8% [63]	64.3% [18]
Farm practices	92.3% [36]	93.2% [82]	100% [28]

- **TLC top considerations:** quality (100 percent), supporting the local farmer (100 percent), and freshness (100 percent)
- **OLC top considerations:** quality (100 percent), freshness (100 percent), and supporting the local farmer (94.3 percent)
- **RLC top considerations:** freshness (100 percent), nutritional value (100 percent), and farming practices (100 percent)

Motivations to Shop at Farm Stands More Frequently

Baby Boomer Motivations	TLC (N=39)	OLC (N=88)	RLC (N=28)
Less crowded	0% [0]	0% [0]	0% [0]
Not enough time	2.6% [1]	0% [0]	0% [0]
Better knowledge on how to cook the food	7.7% [3]	1.1% [1]	10.7% [3]
High quality	30.8% [12]	25% [22]	21.4% [6]
Exposure to new foods	12.8% [5]	5.7% [5]	7.1% [2]
Availability of Specialty Products	12.8% [5]	10.2% [9]	7.1% [2]
Knowing the Money is Supporting a Local Farmer	41% [16]	38.6% [34]	35.7% [10]
Discounts or Special Offers	18% [7]	17.1% [15]	7.1% [2]
Easy to Access/Better Location	23.1% [9]	47.7% [42]	64.3% [18]
Increased Variety of Products	23.1% [9]	31.8% [28]	0% [0]
More Competitive Prices	23.1% [9]	28.4% [25]	32.1% [9]
Different and/or More Hours of Operation	25.6% [10]	15.9% [14]	10.7% [3]

- **TLC top motivations:** knowing the money is supporting a local farmer (41 percent), high quality (30.8 percent), and different and/or more hours of operation (25.6 percent)
- **OLC top motivations:** easy to access/better location (47.7 percent), knowing the money is supporting a local farmer (38.6 percent), and increased variety of products (31.8 percent)

- **RLC top motivations:** easy to access/better location (64.3 percent), knowing the money is supporting a local farmer (35.7 percent), and more competitive prices (32.1 percent)

Barriers that Prevent Shopping at Farm Stands More Frequently

Baby Boomer Barriers	TLC (N=39)	OLC (N=88)	RLC (N=28)
I don't know where the closest one is	0% [0]	4.6% [4]	14.3% [4]
I grow my own food	33.3% [13]	39.8% [35]	50% [14]
I prefer shopping at a grocery store	0% [0]	3.4% [3]	7.1% [2]
I'm not comfortable with how they work	0% [0]	0% [0]	0% [0]
Inconvenient hours	5.1% [2]	6.8% [6]	3.6% [1]
Lack of choice	0% [0]	6.8% [6]	3.6% [1]
Parking is a hassle	0% [0]	1.1% [1]	7.1% [2]
Poor quality food products	0% [0]	0% [0]	3.6% [1]
Poor selection food products	2.6% [1]	5.7% [5]	7.1% [2]
Poor selection non-food products	12.8% [5]	3.4% [3]	3.6% [1]
The shopping environment is not comfortable	0% [0]	1.1% [1]	0% [0]
Too expensive	10.3% [4]	8% [7]	21.4% [6]
Too far away	2.6% [1]	13.6% [12]	35.7% [10]

- **TLC top barriers:** I grow my own food (33.3 percent), poor selection of nonfood products (12.8 percent), and too expensive (10.3 percent)
- **OLC top barriers:** I grow my own food (39.8 percent), too far away (13.6 percent), and too expensive (8 percent)
- **RLC top barriers:** I grow my own food (50 percent), too far away (35.7 percent), and too expensive (21.4 percent)

CSA Segmented Results

CSA Segmented Results by Shopping Pattern

The below results list the considerations, motivations, and barriers respondents experience when subscribing to CSAs in Vermont. The results within this section of the report were determined using the entire dataset of respondents (N=451). The results were then segmented based on respondents' shopping patterns - true local consumers (TLC), occasional local consumers (OLC), and rare local consumers (RLC).

For this section, TLC, OLC, and RLC can be defined as:

TLC: respondents that purchased three or more CSA shares.

OLC: respondents that purchased one to two CSA shares.
RLC: respondents that have not purchased any CSA shares.

Considerations When Subscribing to CSAs

CSA Considerations	TLC (N=33)	OLC (N=103)	RLC (N=315)
Quality	100% [33]	99% [102]	98.4% [310]
Price	66.7% [22]	74.8% [77]	71.8% [226]
Supporting local farmer	100% [33]	96.1% [99]	93% [293]
Organic label	81.8% [27]	69.9% [72]	67.3% [212]
Freshness	100% [33]	100% [103]	97.8% [308]
Environmental impact	100% [33]	88.4% [91]	84.8% [267]
Nutritional value	87.9% [29]	92.2% [95]	87.9% [277]
Cleanliness	57.6% [19]	67% [69]	72.1% [227]
Farm practices	93.9% [31]	94.2% [97]	86.7% [273]

- **TLC top considerations:** quality (100 percent), supporting the local farmer (100 percent), freshness (100 percent), and environmental impact (100 percent)
- **OLC top considerations:** freshness (100 percent), quality (99 percent), supporting the local farmer (96.1 percent)
- **RLC top considerations:** quality (98.4 percent), freshness (97.8 percent), supporting the local farmer (93 percent)

Motivations to Subscribe to CSAs

CSA Motivations	TLC (N=33)	OLC (N=103)	RLC (N=315)
I don't know what a CSA is	0% [0]	0% [0]	0.6% [2]
More organic / local options	3% [1]	1.9% [2]	0.6% [2]
I wouldn't use a CSA	0% [0]	1.9% [2]	2.5% [8]
Availability of Specialty Products	12.1% [4]	7.8% [8]	3.8% [12]
I already subscribe	36.4% [12]	15.5% [16]	0.6% [2]
Better knowledge of how to cook foods	9.1% [3]	5.8% [6]	8.6% [27]
Different share sizes	0% [0]	1% [1]	7.6% [24]
Control what I get	0% [0]	6.8% [7]	6.4% [20]
Exposure to new foods	15.2% [5]	13.6% [14]	8.9% [28]
I grow my own food	6.1% [2]	1.9% [2]	8.6% [27]
Increased Variety of Products	18.2% [6]	28.2% [29]	13.7% [43]
Discounts or Special Offers	12.1% [4]	15.5% [16]	14% [44]

Easy to Access/Better Location	21.2% [7]	17.5% [18]	17.5% [55]
Different pick-up day / More Hours of Operation	21.2% [7]	12.6% [13]	14.6% [46]
Knowing the Money is Supporting a Local Farmer	33.3% [11]	31.1% [32]	19.1% [60]
More Competitive Prices	12.1% [4]	34% [35]	26% [82]

- **TLC top motivations:** already subscribe (36.4 percent), knowing the money is supporting a local farmer (33.3 percent), easy to access/better location (21.2 percent), different pick-up day/more hours of operation (21.2 percent)
- **OLC top motivations:** more competitive prices (34 percent), knowing the money is supporting the local farmer (31.1 percent), and increased variety of products (28.2 percent)
- **RLC top motivations:** more competitive prices (26 percent), knowing the money is supporting a local farmer (19.1 percent), and easy to access/better location (17.5 percent)

Barriers that Prevent Subscribing to CSAs

CSA Barriers	TLC (n = 33)	OLC (n = 103)	RLC (n = 315)
Too Far Away	0% [0]	5.8% [6]	8.6% [27]
Inconvenient Hours	6.1% [2]	13.6% [14]	10.5% [33]
Lack of Choice	0% [0]	11.7% [12]	19.1% [60]
Too Expensive	3% [1]	18.5% [19]	24.4% [77]
Poor Selection of Food Products	0% [0]	3.9% [4]	8.9% [28]
Poor Selection of Non-Food Products	6.1% [2]	6.8% [7]	7% [22]
Poor Quality of Food Products	0% [0]	1% [1]	1% [3]
The Shopping Environment Isn't Comfortable	0% [0]	1% [1]	3.5% [11]
Parking Is a Hassle	3% [1]	0% [0]	1.6% [5]
I'm Not Comfortable With How They Work	0% [0]	4.9% [5]	10.8% [34]
I Prefer Grocery Stores	0% [0]	1.9% [2]	11.4% [36]
I Don't Know Where The Closest One Is	0% [0]	0% [0]	8.3% [26]
I Grow My Own Food	6.1% [2]	30.1% [31]	43.2% [136]

- **TLC top barriers:** I grow my own food (6.1 percent), poor selection of non-food products (6.1 percent), and inconvenient hours (6.1 percent)
- **OLC top barriers:** I grow my own food (30.1 percent), too expensive (18.5 percent), and inconvenient hours (13.6 percent)

- **RLC top barriers:** I grow my own food (43.2 percent), too expensive (24.4 percent), lack of choice (19.1 percent)

CSA Segmented Results by Age and Shopping Pattern

The below results list the considerations, motivations, and barriers respondents experience when subscribing to CSAs in Vermont. The results within this section of the report were determined using the entire dataset of respondents (N=451) to include the insights of the 316 respondents who indicated they did not subscribe to a CSA within the past 12 months. The results were then segmented based on respondents' age (millennials, generation X, and baby boomers) and shopping patterns - true local consumers (TLC), occasional local consumers (OLC), and rare local consumers (RLC).

For this section, TLC, OLC, and RLC can be defined as:

TLC: respondents that purchased three or more CSA shares.
OLC: respondents that purchased one to two CSA shares.
RLC: respondents that have not purchased any CSA shares.

Millennials (Age range: 18-34)

Considerations When Subscribing to CSAs

Millennial Considerations	TLC (N=4)	OLC (N=27)	RLC (N=52)
Quality	100% [4]	96.3% [26]	98.1% [52]
Price	100% [4]	77.8% [21]	76.9% [40]
Supporting local farmer	100% [4]	92.6% [25]	92.3% [48]
Organic label	75% [3]	70.4% [19]	63.5% [33]
Freshness	100% [4]	100% [27]	94.2% [49]
Environmental impact	100% [4]	88.9% [24]	88.5% [46]
Nutritional value	75% [3]	92.6% [25]	84.6% [44]
Cleanliness	0% [0]	66.7% [18]	67.3% [35]
Farm practices	100% [4]	96.3% [26]	88.5% [46]

- **TLC top considerations:** quality (100 percent), price (100 percent), supporting the local farmer (100 percent), freshness (100 percent), environmental impact (100 percent), farming practices (100 percent)
- **OLC top considerations:** freshness (100 percent), quality (96.3 percent), farming practices (96.3 percent)
- **RLC top considerations:** quality (98.1 percent), freshness (94.2 percent), supporting the local farmer (92.3 percent)

Motivations to Subscribe to CSAs

Millennial Motivations	TLC (N=4)	OLC (N=27)	RLC (N=52)
Already do	50% [2]	14.8% [4]	0% [0]
Availability of Specialty Products	0% [0]	14.8% [4]	9.6% [5]
Better knowledge of how to cook foods	0% [0]	18.5% [5]	13.5% [7]
Control what I get	0% [0]	7.4% [2]	9.6% [5]
Different pick-up day and/or more hours of operation	50% [2]	33.3% [9]	23.1% [12]
Different Share Sizes	0% [0]	0% [0]	7.7% [4]
Discounts or Special Offers	25% [1]	18.5% [5]	21.2% [11]
Easy to Access/Better Location	50% [2]	29.6% [8]	26.9% [14]
Exposure to new foods	0% [0]	33.3% [9]	7.7% [4]
Grow my own	0% [0]	0% [0]	5.8% [3]
I don't know what a CSA is	0% [0]	0% [0]	1.9% [1]
I wouldn't use a CSA	0% [0]	0% [0]	5.8% [3]
Increase variety of products	25% [1]	3.7% [1]	15.4% [8]
Knowing the money is support a local farmer	25% [1]	40.7% [11]	13.5% [7]
More Competitive Prices	0% [0]	29.6% [8]	38.5% [20]
More organic/local options	0% [0]	0% [0]	0% [0]

- **TLC top motivations:** already subscribed (50 percent), different pick-up day and/or more hours of operation (50 percent), easy to access/better location (50 percent)
- **OLC top motivations:** knowing the money is supporting the local farmer (40.7 percent), different pick-up day and/or more hours of operation (33.3 percent), exposure to new foods (33.3 percent)
- **RLC top motivations:** more competitive prices (38.5 percent), easy to access/better location (26.9 percent), different pick-up day and/or more hours of operation (23.1 percent)

Barriers that Prevent Subscribing to CSAs

Millennial Barriers	TLC (N=4)	OLC (N=27)	RLC (N=52)
I don't know where the closest one is	0% [0]	0% [0]	7.7% [4]
I grow my own food	0% [0]	29.6% [8]	40.4% [21]
I prefer shopping at a grocery store	0% [0]	7.4% [2]	15.4% [8]
I'm not comfortable with how they work	0% [0]	7.4% [2]	17.3% [9]
Inconvenient hours	0% [0]	25.9% [7]	13.5% [7]
Lack of choice	0% [0]	7.4% [2]	28.9% [15]
Parking is a hassle	0% [0]	0% [0]	5.8% [3]
Poor quality food products	0% [0]	3.7% [1]	0% [0]
Poor selection food products	0% [0]	3.7% [1]	9.6% [5]

Poor selection non-food products	0% [0]	7.4% [2]	9.6% [5]
The shopping environment is not comfortable	0% [0]	0% [0]	1.9% [1]
Too expensive	25% [1]	11.1% [3]	38.5% [20]
Too far away	0% [0]	7.4% [2]	9.6% [5]

- **TLC top barriers:** too expensive (25 percent)
- **OLC top barriers:** I grow my own food (29.6 percent), inconvenient hours (25.9 percent)
- **RLC top barriers:** I grow my own food (40.4 percent), too expensive (38.5 percent), lack of choice (28.9 percent)

Gen X (Age range: 35-54)

Considerations When Subscribing to CSAs

Gen X Considerations	TLC (N=22)	OLC (N=28)	RLC (N=112)
Quality	100% [22]	100% [28]	99.1% [111]
Price	72.7% [16]	64.3% [18]	75.9% [85]
Supporting local farmer	100% [22]	96.4% [27]	93.8% [105]
Organic label	72.7% [16]	64.3% [18]	58.9% [66]
Freshness	100% [22]	100% [28]	98.2% [110]
Environmental impact	86.4% [19]	89.4% [25]	82.1% [92]
Nutritional value	81.8% [18]	85.7% [24]	85.7% [96]
Cleanliness	68.2% [15]	64.3% [18]	72.3% [82]
Farm practices	86.4% [19]	92.9% [26]	83.9% [94]

- **TLC top considerations:** quality (100 percent), supporting the local farmer (100 percent), freshness (100 percent)
- **OLC top considerations:** quality (100 percent), freshness (100 percent), supporting the local farmer (96.4 percent)
- **RLC top considerations:** quality (99.1 percent), freshness (98.2 percent), supporting the local farmer (93.8 percent)

Motivations to Subscribe to CSAs

Gen X Motivations	TLC (N=22)	OLC (N=28)	RLC (N=112)
Already do	31.8% [7]	21.4% [6]	0% [0]
Availability of Specialty Products	9.1% [2]	7.1% [2]	1.8% [2]
Better knowledge of how to cook foods	4.6% [1]	7.1% [2]	11.6% [13]
Control what I get	0% [0]	17.9% [5]	8% [9]
Different pick-up day and/or more hours of operation	9.1% [2]	28.6% [8]	19.6% [22]
Different Share Sizes	0% [0]	3.6% [1]	9.8% [11]

Discounts or Special Offers	9.1% [2]	35.7% [10]	8.9% [10]
Easy to Access/Better Location	9.1% [2]	28.6% [8]	0% [0]
Exposure to new foods	9.1% [2]	3.6% [1]	8% [9]
Grow my own	4.6% [1]	3.6% [1]	18.8% [21]
I don't know what a CSA is	0% [0]	0% [0]	17% [19]
I wouldn't use a CSA	0% [0]	0% [0]	33% [37]
Increase variety of products	13.6% [3]	46.4% [13]	18.8% [21]
Knowing the money is support a local farmer	9.1% [2]	46.4% [13]	17% [19]
More Competitive Prices	9.1% [2]	42.9% [12]	33% [37]
More organic/local options	0% [0]	7.1% [2]	.9% [1]

- **TLC top motivations:** already subscribed (31.8 percent), increase variety of product (13.6 percent)
- **OLC top motivations:** increased variety of products (46.4 percent), knowing the money is supporting a local farmer (46.4 percent), more competitive prices (42.9 percent)
- **RLC top motivations:** more competitive prices (33 percent), I wouldn't use a CSA (33 percent), different pick-up day and/or more hours of operation (19.6 percent)

Barriers that Prevent Subscribing to CSAs

Gen X Barriers	TLC (N=22)	OLC (N=28)	RLC (N=112)
I don't know where the closest one is	0% [0]	0% [0]	10.7% [12]
I grow my own food	4.6% [1]	32.1% [9]	35.7% [40]
I prefer shopping at a grocery store	0% [0]	0% [0]	14.3% [16]
I'm not comfortable with how they work	0% [0]	7.1% [2]	11.6% [13]
Inconvenient hours	4.6% [1]	14.3% [4]	14.3% [16]
Lack of choice	0% [0]	28.6% [8]	23.2% [26]
Parking is a hassle	4.6% [1]	0% [0]	0% [0]
Poor quality food products	0% [0]	0% [0]	1.8% [2]
Poor selection food products	0% [0]	7.1% [2]	11.6% [13]
Poor selection non-food products	9.1% [2]	17.9% [5]	9.8% [11]
The shopping environment is not comfortable	0% [0]	3.6% [1]	3.6% [4]
Too expensive	0% [0]	32.1% [9]	29.5% [33]
Too far away	0% [0]	3.6% [1]	9.8% [11]

- **TLC top barriers:** poor selection non-food products (9.1 percent), I grow my own food, inconvenient hours, and parking is a hassle (4.6 percent)
- **OLC top barriers:** too expensive (32.1 percent), I grow my own food (32.1 percent), lack of choice (28.6 percent)
- **RLC top barriers:** I grow my own food (35.7 percent), too expensive (29.5 percent), lack of choice (23.2 percent)

Baby Boomers (55+)

Considerations When Subscribing to CSAs

Baby Boomer Considerations	TLC (N=14)	OLC (N=36)	RLC (N=154)
Quality	100% [14]	100% [36]	98.1% [151]
Price	57.2% [8]	75% [27]	65.6% [101]
Supporting local farmer	100% [14]	97.2% [35]	92.9% [143]
Organic label	78.6% [11]	80.6% [29]	74.7% [115]
Freshness	100% [14]	100% [36]	98.7% [152]
Environmental impact	100% [14]	94.4% [34]	85.7% [132]
Nutritional value	100% [14]	97.2% [35]	90.9% [140]
Cleanliness	71.4% [10]	63.9% [23]	74% [114]
Farm practices	100% [14]	97.2% [35]	88.3% [136]

- **TLC top considerations:** quality (100 percent), supporting local farmer (100 percent), freshness (100 percent), environmental impact (100 percent), nutritional value (100 percent), farming practices (100 percent).
- **OLC top considerations:** quality (100 percent), freshness (100 percent), supporting the local farmer (97.2 percent), nutritional value (97.2 percent), farming practices (97.2 percent)
- **RLC top considerations:** freshness (98.8 percent), quality (98.1 percent), supporting the local farmer (92.9 percent)

Motivations to Subscribe to CSAs

Baby Boomer Motivations	TLC (N=14)	OLC (N=36)	RLC (N=154)
Already do	14.3% [2]	11.1% [4]	0.65% [1]
Availability of Specialty Products	7.1% [1]	8.3% [3]	3.9% [6]
Better knowledge of how to cook foods	0% [0]	2.8% [1]	2% [3]
Control what I get	0% [0]	5.6% [2]	5.2% [8]
Different pick-up day and/or more hours of operation	21.4% [3]	16.7% [6]	11% [17]
Different Share Sizes	0% [0]	0% [0]	12.3% [19]
Discounts or Special Offers	0% [0]	19.4% [7]	10.4% [16]
Easy to Access/Better Location	14.3% [2]	19.4% [7]	14.3% [22]
Exposure to new foods	14.3% [2]	8.3% [3]	9.1% [14]
Grow my own	14.3% [2]	0% [0]	23.4% [36]
I don’t know what a CSA is	0% [0]	0% [0]	0% [0]
I wouldn’t use a CSA	14.3% [2]	5.6% [2]	12.3% [19]
Increase variety of products	0% [0]	19.4% [7]	13% [20]
Knowing the money is support a local farmer	42.9% [6]	47.2% [17]	22.1% [34]
More Competitive Prices	14.3% [2]	38.9% [14]	20.1% [31]
More organic/local options	7.1% [1]	2.8% [1]	0.65% [1]

- **TLC top motivations:** knowing the money is supporting a local farmer (42.9 percent), different pick-up day and/or more hours of operation (21.4 percent)
- **OLC top motivations:** knowing the money is supporting a local farmer (47.2 percent), more competitive prices (38.9 percent), discounts or special offers (19.4 percent), easy to access/better location (19.4 percent), increase variety of product (19.4 percent).
- **RLC top motivations:** grow my own (23.4 percent), knowing the money is supporting a local farmer (22.1 percent), more competitive prices (20.1 percent)

Barriers that Prevent Subscribing to CSAs

Baby Boomer Barriers	TLC (N=14)	OLC (N=36)	RLC (N=154)
I don't know where the closest one is	0% [0]	0% [0]	6.5% [10]
I grow my own food	7.1% [1]	36.1% [13]	49.4% [76]
I prefer shopping at a grocery store	0% [0]	0% [0]	7.8% [12]
I'm not comfortable with how they work	0% [0]	2.8% [1]	8.4% [13]
Inconvenient hours	0% [0]	8.3% [3]	7.1% [11]
Lack of choice	0% [0]	5.6% [2]	12.3% [19]
Parking is a hassle	0% [0]	0% [0]	1.3% [2]
Poor quality food products	0% [0]	0% [0]	0.65% [1]
Poor selection food products	0% [0]	2.8% [1]	6.5% [10]
Poor selection non-food products	0% [0]	5.6% [2]	4.6% [7]
The shopping environment is not comfortable	0% [0]	0% [0]	3.9% [6]
Too expensive	0% [0]	16.7% [6]	16.2% [25]
Too far away	0% [0]	5.6% [2]	7.8% [12]

- **TLC top barriers:** I grow my own food (7.1 percent)
- **OLC top barriers:** I grow my own food (36.1 percent), too expensive (16.7 percent), inconvenient hours (8.3 percent)
- **RLC top barriers:** I grow my own food (49.4 percent), too expensive (16.2 percent), lack of choice (12.3 percent)

Regularly-Used Communication Channels

As a whole, the most frequently used communication channels among respondents were Google search (66.1 percent), Facebook (60.5 percent), Front Porch Forum (57.9 percent), and VPR (57.7 percent). See the table below for the overall list of communication channel usage for the survey respondents as a whole.

Overall Communication Channel Use (non-segmented)

Media Platforms	Response (N=451)
Google Search	**66.1% (298)**
Facebook	**60.5% (273)**
Front Porch Forum	**57.9% (261)**
VPR	**57.7% (260)**
Email Lists	50.6% (228)
Local Newspapers	43.2% (195)
Seven Days	40.4% (182)
Instagram	25.1% (113)
Online Directories	22.2% (100)
Food & Community Blogs	18.6% (84)
Yelp/TripAdvisor	12% (54)
Twitter	10.6% (48)
QR Codes	0.7% (3)
Word of mouth	0.4% (2)

*Respondents were able to choose more than one answer.

Although the above communication channels were the most popular channels overall, communication preferences are significantly different among age groups. Because the in-state survey was skewed toward older generations, the above communication channels may also be skewed. Therefore, we have broken out communication preferences below based on age and direct market. In the tables below, respondents were segmented by direct market (if they had shopped there within the past 12 months) and then by age.

Communication Channel Usage by Direct Market and Age (segmented)

Farmers Markets (N=373)		
Millennials	Gen X	Baby Boomers
Google Search (79.7%)	Google Search (71.5%)	VPR (65.4%)
Facebook (78.4%)	Facebook (67.2 %)	Front Porch Forum (64.8%)
Instagram (71.6%)	Email Lists (56.2%)	Local Newspapers (58.6%)

*Respondents were able to choose more than one answer.

Farm Stands (N=324)		
Millennials	Gen X	Baby Boomers
Google Search (83.6%)	Google Search (50.3%)	Front Porch Forum (61.9%)
Facebook (78.2%)	VPR (46.5%)	VPR (59.4%)
Instagram (72.7%)	Facebook (45.2%)	Google Search (57.4%)

*Respondents were able to choose more than one answer.

CSAs (N=451)		
Millennials	Gen X	Baby Boomers
Google Search (80.7%)	Google Search (72.2%)	Front Porch Forum (61.6%)
Facebook (75.9%)	Facebook (65.4%)	VPR (60.2%)
Instagram (69.9%)	VPR (54.9%)	Google Search (56.3%)

*Respondents were able to choose more than one answer.
**See Appendix (p. 144) for full list of communication channel usage for each direct market.

Across all markets, millennials had the same communication preferences with Google Search, Facebook, and Instagram being the most commonly-used communication channels.

Although there were slight variations in communication preferences among Gen X shoppers, Google Search and Facebook were both listed as a top-three communication channel across all direct market channels. VPR and email lists were also included as top communication channels for this age group.

Baby boomers chose Front Porch Forum and VPR as their top communication channels across all direct market channels. Google Search and the local newspaper were also popular among this age group.

Discussion/Recommendations

Through this survey, we were able to identify primary shoppers, baseline purchasing patterns, how to increase direct market attendance frequency, and how the target audience consumes content.

The results showed these consumers are typically middle-class families, have a high level of education, are middle-aged, and are shopping for a family size of two. They currently frequent farmers markets and farm stands during the summer months, but drop off during the winter months and consistently avoid CSAs.

Farmers markets and farm stands face challenges with providing shoppers greater convenience in time and location, and pricing their goods competitively. Whether this is perception or reality matters little, as this is how consumers are currently feeling. If moving locations or offering additional times is not realistic, messaging can be created and circulated to alter the perception that direct markets lack these qualities.

CSAs have a high potential for improvement by adding flexibility to their model. While adding more choice and creating share size options were not top answers, a significant number of people manually wrote in these suggestions.

By far, CSAs elicited the most emotional response on this survey compared to any other direct market. People feel strongly about CSAs, and it, for the most part, was a 'bad' feeling. Respondents felt compelled to expand on the provided answer choices by typing custom responses into the "Other" section. Lack of choice and flexibility were common written answers that should be addressed.

Below we have discussed the trends among age groups and shopping patterns to draw conclusions on how messaging can be used to encourage consumers to shop locally and to overcome perceptions surrounding individual direct market channels.

Farmers Market Findings

Farmers Market Considerations

Despite being segmented by age and shopping pattern, most consumers who shop at farmers markets all consider quality, freshness, and supporting the local farmers a top priority. Therefore, to increase spending or to encourage more frequent farmers market attendance, it's important to emphasize the quality and freshness of the local produce at farmers markets, while also showing how shopping locally better supports local farmers than shopping at traditional grocery stores.

Farmers Market Motivations

When comparing the answers across age groups and shopping patterns, the results show that most farmers market shoppers would be encouraged to shop more if there were more or different hours of operation and if the markets were more easily accessible. Competitive pricing and greater product variety are also significant motivators among farmers market shoppers. While hours and location may not be easily altered, it is possible that shoppers are unaware of all current locations and hours of operations. Messaging should advertise when and where farmers markets are occurring and also address the perception that farmers market prices are higher than those of traditional grocery stores.

Farmers Market Barriers

Across all age groups and shopping patterns, the major barriers that prevent shopping at farmers markets include consumers growing their own food, inconvenient hours, and the expense of items. To help consumers overcome these barriers, messaging should explain how produce at farmers markets can help to supplement homegrown produce, while also addressing the perception that farmers markets are much more expensive than grocery stores.

Farm Stand Findings

Farm Stand Considerations

Across all age groups and most shopping patterns, quality, freshness, and supporting local farmers are major considerations when shopping at farm stands. Farming practices were also listed multiple times as a top consideration. Therefore, messaging should focus on the quality and freshness of produce at farm stands, while also emphasizing how patronizing farm stands will support local farmers. Because farming practices are also considered, organic-certified and sustainable farmers should advertise their practices to ensure consumers are well-informed. When consumers are unsure of a farmers' practices, they are less likely to shop at that farm stand.

Farm Stand Motivations

Across all age groups and shopping patterns, shoppers would be motivated to shop at farm stands more if it were more convenient (better location, more/different hours). Because of the nature of farm stands, these cannot be easily changed, but farm stands can make an effort to better advertise their current location and hours to ensure consumers are well-informed. Another top motivator was knowing the money is supporting a local farmer and an increased variety of products. Messaging should highlight how shopping at a local farm stand supports your local farmer. Because of the perceived lack of variety at farm stands, messaging should also show how shopping at farm stands can supplement what you buy elsewhere, or if possible, overcome the perception that farm stands do not offer a variety of products.

Farm Stand Barriers

Across all ages and shopping patterns, consumers are growing their own food at home. These consumers also believe that farm stands are too far away and too expensive to provide the products they need. Therefore, messaging should highlight how farm stand produce can supplement homegrown produce. While farmers cannot change their location, they should better advertise their location to ensure consumers are well-informed, and efforts should be made to overcome the perception that farm stands are much more expensive than traditional grocery stores.

CSA Findings

CSA Considerations

Across all age groups and shopping patterns, quality, freshness, and supporting local farmers are top considerations when deciding whether or not to subscribe to a CSA. Farming practices were also a significant consideration. Therefore, it's important that messaging for CSAs highlights the high-quality, fresh produce available through their service and how subscribing will help to support your local farmer. Additionally, if farmers are organic-certified and use sustainable practices, they should advertise their farming practices to build trust with consumers by increasing awareness of practices.

CSA Motivations

To motivate consumers to subscribe to CSAs, messaging should highlight the variety of produce available through CSA shares, as well as the value of purchasing shares. Convenience also appeared to be a motivator, so messaging should inform consumers on all the ways they can pick up their CSA shares. If at home delivery or multiple drop-off stations are available, it should be highlighted in messaging to ensure consumers are well-informed.

CSA Barriers

A major barrier, across all age groups and shopping patterns, that prevents shoppers from subscribing to a CSA, is that consumers grow their own food. Consumers also perceive CSAs to be expensive and have too few choices. Therefore, messaging to overcome barriers should highlight how CSAs can help to supplement homegrown produce or how it differs from homegrown produce. It should also aim to overcome the perception that CSAs are expensive and have a limited selection, or it should explain the value that comes with the high cost of a CSA subscription.

It should also be noted that across all age groups, TLCs that shop at CSAs chose very few barriers that would prevent them from subscribing to a CSA. For the millennial and baby boomer shopping groups, only one barrier was chosen by one person. (Millennial TLC chose too expensive and baby boomer TLC chose I grow my own food). All other TLC respondents did not list any barriers. This indicates that while many consumers do not subscribe to CSAs, those who do subscribe, love their CSA and do not perceive many (if any) barriers that would prevent them from subscribing again. Because of TLCs' strong appreciation for CSAs, these trends may also show that many of the negative perceptions felt among OLCs and RLCs are misguided. If perceptions are false, messaging should aim to inform direct market shoppers to overcome negative perceptions.

Out-of-State Survey

Methodology

Primary data was collected using an online survey software which administered questions to an online portal of 290 food shoppers in Vermont from September through October 2017.

The goal was to create an out-of-state survey that targeted tourists in the Northeast United States and neighboring Canadian provinces that take frequent vacations to Vermont. These individuals included current direct market shoppers and shoppers who only have a passing interest in buying local direct. The survey outcome was to determine why current tourists visit Vermont and how to raise their awareness of local direct market shopping options.

The questions were divided into four categories and determined the differences between Total Local Shoppers (TLC), Occasional Local Shoppers (OLC), and Rare Local Shoppers (RLC). The groups were created to identify the primary shopper, establish baseline traveling patterns, pinpoint ways to increase the frequency of visits, and understand which marketing channels are the most effective.

These categories of questions will help build the follow-up messaging and positioning that will specifically target Vermont tourists. This data will be the backbone to finding the correct audience, creating the right content, and distributing that content through the best-suited marketing channels.

This data was gathered through multiple channels. They consisted of, but were not limited to:

- Vital Communities - Upper Valley
- Vermont Department of Tourism Marketing Newsletter
- NOFA-VT Newsletter
- NOFA partners from MA, NH, and NY
- Facebook & Twitter
- Paid audience geo-targeted to New England
- TripAdvisor forum
- Question & Answer forums

The sample size covered every state in New England (excluding Vermont) and multiple Canadian cities close to the border. See Appendix (p.146) for distribution map. The tourist survey had a sample size of 290 responses. Through our survey, we developed a unique set of observations to be applied to each category of questions. We targeted tourists by using disqualifying logic on an introduction question. If a respondent indicated they lived in Vermont, they were immediately disqualified from the tourist survey and redirected to the NOFA-VT in-state survey.

Much like the in-state survey, the majority of respondents were female, coming in at a slightly lower 64.5 percent. At 34.1 percent, a bachelor's degree was the most common level of education, and 38.9 percent of respondents said their yearly household income was below $50,000. These statistics show a lower education level and household income level compared to the in-state survey.

The age of tourist direct market shoppers was distributed across the survey's age brackets. While the highest amount of people said they were between the ages of 25 - 34 (32.4 percent), there was a close split between 35 - 54 and 55+ (28.6 percent and 22.4 percent respectively). The most common household sizes consisted of two or four+ residents. When it came to respondents' weighted mean travel party size, they visited with only two adults and one child.

The Primary Shopper Recap

Question	Response	Percentage
Gender	Female	64.5%
Household Income	Below $50,000	38.9%
Education	Bachelor's degree	34.1%
Travel Party Size	Adults / Kids	Weighted Mean 2.08 adults, and 0.94 kids
Age	24 - 35	32.4%
Household Size	2 or 4+	31.4% and 33.8%

**See Appendix (p. 146) for the complete out-of-state demographics table.*

Results

Visiting Patterns

Tourists are visiting the state predominantly in the summer and fall months. They are most likely to visit once per year (41 percent), are apt to stay for two nights (29.3 percent), and typically seek out hotel rooms for their lodging needs (37.9 percent).

While only 11.7 percent visited Vermont with the intention of attending or shopping at a local direct market, the majority of respondents said they came to sightsee and visit family members. Yet, on average 73.9 percent of respondents stated they have occasionally been to a direct market during one of their visits.

Question	Response	Percentage
How frequently do you visit Vermont? Once per year	Once a year	41%
How many nights do you stay when you visit?	Two nights	29.3%
What is your primary reason for visiting?	Direct market shopping	11.7%
No matter what your reason for visiting Vermont, have you been to a direct market	Occasionally or more	73.9%

*See Appendix (p. 147) for complete list of out-of-state survey visiting patterns.

Frequency and Motivation

Tourist target audiences and their baseline shopping habits tell a different story from the average in-state direct market consumer. Therefore, it is important to pinpoint the messaging that is unique to these buyers for any future marketing campaigns.

This designation can be categorized between two issues: consumers' perceived value of Vermont's direct markets and which values they hold the most important for each market. Gauging these two categories will show us the gap between what content is currently being used to drive awareness and how it should be modified in the future.

We decided to look at direct markets as a whole and each market separately. Visitors' perceptions and reasons for visiting Vermont farmers markets, farm stands, and farms were tested.

When looking at direct markets as a whole, respondents associated Vermont food and farms as being affordable (72.7 percent) and delicious (80 percent).

When asked if they visit direct markets in their home state, 65.9 percent of respondents either agreed or strongly agreed they visit farmers market; 62.8 percent visit farm stands; and 45.5 percent visit farms.

Respondents' intentions when visiting farmers markets are heavily food-centric. They are either interested in purchasing prepared foods (42.8 percent), buying food to cook with during their stay (46.9 percent), or stocking up on food to bring back home (55.2 percent). Other traits like entertainment, tours, and taking pictures were not as common for farmers market shoppers.

Farm stands mostly followed the same trend with a slight difference. 49.3 percent indicated they were attending to purchase food to cook during their stay, and 50.3 percent were looking for food to bring home, while purchasing prepared foods dropped significantly (25.5 percent). Both of these direct markets seem to draw consumers of convenience, looking to fulfill a need to prepare or eat meals while on vacation.

Vermont farms were the outlier in the tourist survey. With farmers markets and farm stands, many of the shopping choices revolved around convenient food purchases, while farm tended to be planned entertainment destinations. Respondents attend farms to take pictures (42.4 percent), take tours (41.4 percent), and pick their own produce (39.7 percent).

Results Recap

Question	Response	Percentage
Think about Vermont food and farms. Please respond accordingly:	Local Vermont food is affordable and delicious	72.7%, and 80%
Think about the reasons that you visit a farmers market. Consider the following:	Prepared food	42.8%
Think about the reasons that you visit a farm stand. Consider the following:	Food to cook with	49.3%
Think about the reasons that you visit a farm. Consider the following:	To take pictures	42.4%

*See Appendix (p. 148-150) for complete list of considerations for out-of-state survey respondents.

Regularly-Used Communication Channels

When asked how they get information on where to get/eat food during their stay, respondents listed family and friends (49.3 percent), online search (33.1 percent), and visitors centers (28.3 percent) as their top three resources. These results should be considered when determining the most effective channels to reach tourists.

See the table below for the most frequently used communication channels. We have also included the most common types of lodging as this may be an effective way to communicate with tourists during their stay.

Question	Response	Percentage
What type of lodging do you typically stay at when you visit Vermont?	Hotel/Motel Inn/Bed & Breakfast	37.9% 24.8%
Where do you get information about where to eat/get food when you're visiting Vermont?	Family & Friends	49.3%
Where do you get information about where to eat/get food when you're visiting Vermont?	Online Search	33.1%
Where do you get information about where to eat/get food when you're visiting Vermont?	Visitor Centers	28.3%

*See Appendix (p. 151) for full list of communication channel usage among tourists.

Discussion

Through this survey, we were able to identify primary shoppers, baseline purchasing patterns, how to increase direct market attendance frequency, and how the target audience consumes content.

The results showed these consumers are typically middle-class families, have a bachelor's degree level of education, are between 35 - 54, and are shopping for a group of two adults and one child. They currently frequent farmers markets and farm stands to buy either prepared food, food to cook during their trip, or food to bring home. However, their intent changes when it comes to farm visits. Here, they tend to plan it as an entertainment event with less emphasis on food purchases.

Trip Logistics

According to the out-of-state survey, the majority of tourists visit once or twice per year for two to three nights during the fall and summer seasons. The average tourist group contains approximately two adults and one child and the majority of respondents had an income below $50,000 per year. Hotel/Motel (37.9 percent) and Inn/Bed and Breakfast (24.8 percent) were the most popular lodging choices for tourists visiting Vermont.

When asked how long they typically stay in Vermont, nearly one third (29.3 percent) stay for two nights, and approximately one out of five stay for three nights (21.7 percent) or four nights to one week (21.4 percent). These findings show the general visit to Vermont is often short, which may point to a high concentration of weekend visits. Therefore, direct markets may be more popular with tourists if they take place between Friday and Sunday. Respondents also were within the lower income category which suggests they may be more price conscious and come to Vermont because it presents a cheaper option than traveling out of the Northeast region.

Reasons for Visiting Vermont

Sightseeing (32.1 percent) and visiting family (24.8 percent) are the two main reasons for visiting Vermont, with only 11.7 percent of tourists stating they come to shop at direct markets. However, the data also revealed 54 percent of tourists visit farmers markets during all or most visits, 44.8 percent visit farm stands during all or most visits, and 41.7 percent visit farms during all or most visits. This shows us that although traveling to direct markets is the main tourists' main motivation for traveling to Vermont, a significant number of them are attending direct markets during their stay. Direct market shopping behavior is not planned by tourists, but it is a common, spontaneous act. This is a critical indicator for future messaging and awareness initiatives.

Eating & Shopping Habits

Nearly half of respondents (47.2 percent) prepare one meal per day during their trip. When shopping for food to prepare, grocery stores (43.5 percent), farmers markets (42.1 percent), and farm stands (38.3 percent) were the most common options among tourists.

Although tourists are often staying in hotels, motels, inns, and bed and breakfasts, they are still preparing meal during their visits, and they view farmers markets and farm stands as a nearly equal option for shopping as the traditional grocery store.

Motivations for Shopping at Direct Markets

Farmers Markets

When considering their reasons for shopping at farmers markets, tourists primarily view it as a way to purchase food (both pre-prepared and unprepared), with 55.2 percent saying they visit to stock up on foods to take home, 46.9 percent to buy foods to cook during their stay, and 42.8 percent to buy prepared foods, such as breakfast or lunch. Farmers markets should emphasize food options, including the variety of both fresh and prepared choices.

Farm Stands

The major reasons for visiting farm stands were to purchase food to cook during their stay (49.3 percent) and to stock up on foods to take home (50.3 percent). These values demonstrate that, like farmers markets, farm stands are viewed as a place for purchasing food rather than for an experience with high entertainment value. Knowing this, farm stands should advertise how their fresh, local produce is perfect for cooking during tourists' visits, while also emphasizing how tourists can bring Vermont produce back to their home state.

Farms

Unlike the other two direct markets, farms were viewed more as a source of entertainment rather than as a place to purchase food items. Tourists' motivations for visiting farms included taking pictures (42.4 percent), take a tour (41.4 percent), and to pick their own produce (39.7 percent). These values indicate that visits to farms are based more on experiences gained and family entertainment over the need for purchasing food; therefore, messaging should focus on being a planned destination that highlights sightseeing, tours, and "pick your own" style options.

Recommended Messaging

When developing the messaging for direct markets, we developed personas based on the trends we realized in the data. Across all age groups and shopping patterns, we found that all direct market shoppers consider quality, freshness, price, and supporting local farmers as top priorities. Therefore, we recommend in all future development of messaging, that NOFA focus on these aspects of direct markets, both as a whole and individually.

With that in mind, we developed the below table to guide future messaging. Explanations of each persona are included below the table.

Persona	Motivation	Barrier	Recommended Channel	Benefit
Grower	• Farming Practices • Quality • Freshness	• Price • Convenience • Trust of farming practices	• Farm Stand • CSA	• Support local farmers • Supplement food supply
Organic Loyalist	• Organic-Certified • Nutrition • Quality • Freshness	• Trust of farming practices	• Farmers Market • Farm Stand • CSA	• Support local farmer • Freshness • Quality
Value Shopper	• Discounts/Special offers • Quality • Freshness	• Price	• Farmers Market • Farm Stand	• Support local farmer • Value (what they get for their money)
On-the-Go Shopper	• Better Convenience • Quality • Freshness	• Time • Parking • Location • Hours of operation	• CSA	• Convenient • Quality • Freshness
Tourist	• Food access • Quality • Freshness • Experience VT	• Awareness	• Farmers Market • Farm Stand	• Quality • Freshness • Experience VT food
Families	• Convenience • Price • Quality • Freshness	• Price • Homegrown produce • Time	• CSA • Farm Stand	• Support local farmer • Quality • Freshness

		• Parking • Location		• Convenience • Value

Horizontal Message

Awareness was an issue across the board with Vermonters. Repeatedly, survey and focus group respondents stated that different/more hours of operation and different locations would motivate them to shop at direct markets more often. While it may be difficult or impossible to change the location and hours of direct markets, it is critical to increase Vermonters' awareness of where and when specific direct markets are taking place. Efforts should be made to better advertise the location and hours of operation of all direct markets across Vermont.

As stated above, we found that the values of **freshness, quality, price, and supporting local farmers** are messages that resonated with Vermonters across all age groups and shopping patterns. Therefore, we recommend that all messaging to the below personas implement these messages to ensure resonation and encourage behavior change.

Grower

We found that a major barrier preventing Vermonters from shopping at direct markets is that they grow their own produce at home. These growers have the convenience of having their produce in their backyard, while also **knowing and trusting their own farming practices**. These consumers also believe their homegrown produce is cheaper than the produce available at direct markets.

Knowing these barriers, we recommend messaging targeted at growers should encourage them to shop at farm stands and CSAs. Farm stands allow consumers to **build trust** by speaking with farmers to learn about their farming practices, while also enabling them to avoid the crowds and parking issues associated with farmers markets. CSAs also offer a transparent relationship with farmers while also offering convenience with their flexible models.

Messaging should highlight how shopping at farm stands will support local farmers while also **supplementing growers' homegrown produce**. For example, if a grower's tomato supply was weak this year, they can visit the nearest farm stand to ensure they have plenty of produce to get the nutrients they need, while also supporting their local farmer.

Organic Loyalist

Another major trend that we noticed in the focus groups and surveys is that Vermonters care about the farming practices associated with the produce they buy. Organic loyalists are not as concerned with price as much as they are concerned with how "organic" their produce is. Knowing that their food is **organic-certified, high-quality, and fresh** are significant motivators to increase their shopping at direct markets. Trust is their biggest barrier because often farmers' practices are not displayed at direct markets, so they are unsure if food is organic-certified.

We recommend advertising all direct markets to organic loyalists because organic-certified outlets exist within each channel. Direct market channels that are organic-certified should make their farming practices clear, so that organic loyalists can rest-assured their food is meeting their standards.

Messaging targeted at organic loyalists should highlight the number of **organic-certified farms** in the area, while emphasizing the **quality** and **freshness** of local produce. To further convince organic-loyalists to choose direct markets over traditional grocery stores, messaging should also discuss how shopping at direct markets supports local farmers, as this is a message that resonates with shoppers across the board.

Value Shopper

Price was a concern for a majority of in-state survey respondents and focus group attendees. Therefore, it is important to develop messaging that speaks directly to the price-conscious value shopper. We recommend advertising farmers markets and farm stands directly to value shoppers because they may not be able to afford the high initial costs associated with CSAs.

With price being these shoppers' biggest barrier, it is important to highlight the **value of the produce** they can purchase at direct markets. Messaging should aim to overcome the perception that farmers markets and farm stands are much more expensive than the traditional grocery store, while also explaining the value of purchasing local produce. Explain how local produce is **high quality and fresh** because it was grown nearby – shoppers can rest assured they are purchasing highly nutritious, fresh food for only a slightly higher price than what is available at their grocery store. Not to mention, they are also **supporting their local farmer** when they shop at direct markets.

On-the-Go Shopper

On-the-go shoppers often have little time to shop and are **looking for the quickest, easiest way to purchase groceries**. **Convenience** is the most significant factor that prevents these consumers from shopping at direct markets. We define convenience as time needed to get to and from the direct market channel, time needed to find parking, and the ability to shop during the market's hours of operation.

We recommend advertising CSAs specifically to on-the-go shoppers. They will not have to deal with crowds or parking issues associated with farmers markets, and farm stands may not be close enough for these shoppers to quickly pick up needed items. CSAs have multiple options that might fit the hectic lifestyle of these consumers. Messaging should highlight the customization available with CSAs. Emphasize how some offer home delivery, while others issue debit cards that can be used at farm stands so they can shop whenever is most convenient for them.

Messaging can also explain product availability. Are shoppers able to add meat and dairy to the traditional produce baskets from their CSA? If so, let them know. These shoppers want shopping to be as easy as possible, so let them know their options and how simple it is for them to receive their groceries on their terms.

Tourists

Vermont tourists' greatest needs for direct markets revolved around purchasing food – both to prepare during their visit and to take back to their home state at the end of their trip. Their biggest **barrier was awareness** of when and where direct markets are taking place. When visiting, the majority of tourists stay at hotels/motels and inn/bed and breakfasts. To overcome awareness, we recommend targeting these establishments with messaging that provides information about the locations and hours of nearby farm stands and farmers markets.

Additional messaging should showcase how tourists can truly **experience Vermont** by purchasing the local products at farm stands and farmers markets. We know that the majority of tourists are cooking one meal per day throughout their stay, so messaging should highlight that while they are in Vermont, they should live like Vermonters and eat the local produce, while also explaining the **freshness** and **quality** of local produce. At the end of their trip, tourists can bring Vermont home with them by purchasing products at farm stands and farmers markets before they depart.

Families

When looking specifically at households with three or more members, we found the top barriers that prevent them from shopping at direct markets more frequently revolved around price, convenience, and growing their own produce. **Better/easy to access locations**, **more hours of operation,** and **competitive pricing** would motivate families to shop at direct markets more frequently.

Families are often rushed and are looking for a quick, cheap solution to purchasing produce. We recommend advertising CSAs and farm stands to families because these markets will allow them to quickly, conveniently shop for produce without the parking hassles and crowds associated with a farmers market.

For this group, it is critical to overcome the perception that direct markets are more expensive than grocery stores. Quality, freshness, and supporting local farmers are top considerations for this group as well, so messaging should highlight the value of purchasing goods at direct markets. It should explain how the slight difference in price is worth the difference in quality and freshness.

As for the convenience factor, messaging should also highlight the customization available with CSAs and emphasize how some offer home delivery, while others issue debit cards that can be used at farm stands so they can shop whenever is most convenient for them.

Appendix

Focus Group Notes

Chittenden County Focus Group

Date: August 19, 2017
Location: Healthy Living Learning Center
Time: 10:30 AM - 12:00 PM (90 minutes)

Roles
Moderator: George Schildge
Assistant Moderator: Katie Lukes
Observer: Lyn Severance

Introduction (15 minutes)

Welcome
- Introduce moderator and assistants.
- Invite participants to eat the food and drinks.
- Be warm and inviting in tone. Purposeful small talk.

Overview of Topic
- Northeast Organic Farmers Association of Vermont
- Locally-grown food sold at direct markets. For the purpose of today's discussion, direct markets are Farmers Markets, Farm Stands, and CSAs.
- You were all selected to be here because you live in the same county, and you all shop for someone in addition to yourself.

Ground Rules
- No wrong answers, only differing points of view.
- We are tape recording; please speak one person at a time.
- We are on a first name basis.
- You do not need to agree with others, but you must listen respectfully as others share their views.
- Feel free to write things down to gather your thoughts before talking.
- Cell phones: We ask that you turn your cellphones off. If you cannot and you must take a call, please do so quietly and as quickly as you can.
- My role as moderator will be to guide the discussion.
- Talk to each other.

First Question

Round Table - everyone in circle answers.

1. Tell us your name and where you are from originally? How long have you lived in Vermont?

Key Questions (50-60 minutes)

<u>Vermont Locally-Grown Food Messaging Questions:</u>

A. Written Down - 15 seconds for each question

Directions: *"Write 'A' in the upper right-hand corner of your card. For this first question, write number 1. Leave room to answer 4 questions. You may go onto the back of your card if you need to."*

1. *What comes to mind when I say locally-grown food?*
    - I'm a bit blank
    - Veggies
    - Farmers, farm stands, CSAs, sustainability, community
    - Local VT farms and farmers
    - Small community oriented farms
    - Healthy, fresh, better for the environment
    - In season, limited selection food, healthy
    - My garden

2. *What comes to mind when I say farm fresh food?*
    - Overused slogan
    - Veggies again
    - Freshly harvested, farmers, "fresh" doesn't mean much
    - Food that is harvested and brought to market without storage or processing
    - Food grown on farms shortly before sale
    - Better quality and flavor
    - Somewhat expensive restaurants, farmers markets
    - Good chickens as opposed to Tyson industry raised chicken
    - Farm stand

3. *What comes to mind when I say organic food?*

- Mixed feelings
- Buyable veggies and fruit
- Sustainable, healthy, environmentally sustainable
- No chemicals, sustainable farming
- No pesticides, etc.
- Overpriced, fancy, not necessarily more healthy
- More expensive food, have questions about how it got that label and if it's a real indication of higher quality
- Healthy and expensive
- Expensive

4. Are you more likely to buy something if it was grown in Vermont? Why or why not?
    - Yes. Supporting local people
    - Yes - less travel so tastes better. Tends to be low in pesticides and antibiotics
    - Yes - support local economy and community; more environmentally friendly; high quality
    - Yes, healthier for all! Less pollution from transportation and processing
    - Slightly more likely to want to support local farms and businesses
    - Yes - I like to minimize my food's carbon footprint when I can
    - It really depends on the price and what the product is so it varies
    - 50/50 expense
    - Yes. I have been committed to eating locally for most of my adult life

<u>Shopping Patterns Questions:</u>

Open-Ended Question

1. *Where do you buy fresh produce?*
    - Summer time farmers markets…drive way out to Richmond. Driving a half hour each way. Old North End Farmers Market
    - Shaws, Hannafords, Sweet Clover, 95% of shopping at City Market
    - Produce outside of Scout Coffee
    - Big garden – freezing and canning
    - Reluctantly buy produce at City Market
    - Village Market, Mac's, "Mazza's because it's on the way."
    - Intervale CSA, Costco
    - Trader Joe's

- Winooski
- Full Moon Farm…pick up right at work…100% of veggies 20 weeks out of the year. Berry Picking

2. *Where do you shop for locally-grown produce?*
    - Major accomplishment if we finish all our CSA food…do not seek out locally grown produce. Selling point if they have it at the store I'm shopping at
    - Don't pay particular attention…whatever looks good or affordable
    - Got locally grown food from City Market
    - Regardless of where I shop, I try to purchase something locally grown
    - Won't buy if farmers do not have best practices
    - Not something I seek out in terms of produce…so focused on what I usually get at the grocery story
    - Transitioning to eating more healthy

3. *For what reasons you buy local food?*
    - Watching television and seeing all the chemicals and not know what is in my food. A lot of dangerous stuff you need to protect yourself from. My protection is to seek out things that have not been changed for money's sake. "The spinach the soldiers ate in WWII is 12x's more nutritious than today. No wonder our guys are fainting on the field."
    - Healthier, knowing what is in it. Support the local economy
    - The less they have to travel, the more nutritious they have to be. Not fond of huge mega companies. Product and brand compromised when become bigger
    - Exclusively to support local economy.
    - Pretty concerned about climate change. The more I can support the local economy the better
    - Labor exploitation…frightening and concerning
    - Environmental reasons….tastes better! "This is amazing" support local economy
    - Environmental "with some exceptions, I have to have avocados." I do not do it in my practice, but those are the reasons
    - Reduce the carbon footprint of my food. Concerns about the long range of sustainability. Vermont has a great local food infrastructure. A way to get my little boy excited about local food

B. Written Down

Directions: *"Write the letter 'B' in the upper right-hand corner of your card. I'll give you 30 seconds to describe what type of shopper you are. When we are done, place your card in the middle."*

1. *What kind of shopper are you?*
    - Daily, weekly, on the way home. Organic, local, healthy.
    - In and out fast as I can, with a list. I hate shopping.
    - No list, not price sensitive, feel it out as I go, a bit random.
    - Concerned about sustainability, environmental footprint and health of food. But also seek a good value for what I'm buying. Also vegetarian and buying primarily simple unprocessed foods.
    - I try to get the most value for my money. Not necessarily the cheapest food but the best quality that I can for my budget. I seek variety, nutrition, and taste.
    - Cheap, quick, generally stick to routines and know items, unless I'm making a new recipe. Money is a primary concern for me, so I feel like I compromise on some things in order to save money.
    - I do most of my food shopping at Trader Joe's because I can get in and out really quickly. Their products are consistent and the store is really small. I like to do some meal planning ahead of time then build out the rest of my shopping list after I see what's in my CSA for the week.
    - I focus on price and ease of preparation first, and also on what will last, so I don't have to micromanage the cooking schedule.
    - Conscientious - looking for best price non-GMO, preferably organic, no ingredients I don't have in my pantry. Healthy - no or low sugar and white flour.

<u>Direct Markets Convenience Questions:</u>

C. Written Down Question

Directions: *"Write the letter 'C' in the upper right-hand corner of your card. I will give you about a minute."*

1. *Make a list of all the direct markets (farmers markets, farm stands, CSAs) you can conceivably shop at. Please make this list horizontally, top to bottom, because we will come back to this list. Now list how many times you have shopped at each of these in the past 12 months.*
    - Response 1

    - EJ farmers market (last year) - x2
    - Richmond farmers market - x1
    - Burlington farmers market - x1
    - Mazza's farm stand - x3
    - Maple Wind farm in Richmond - x1
    - Jericho Settlers farm
    - Old North End farmers market
    - Waterbury farmers market - x1
    - Conants farm in Richmond - x3
    - Adams in Williston
    - Blueberry farm in Huntington - x1
    - Shelburne Orchard - x1
- Response 2
    - Pitchfork farm CSA - have the CSA
    - Intervale farm CSA
    - Fullmoon farm CSA
    - Golden Russet CSA - Addeson Co
    - God River farm stand - Mtpr
    - Mazza's
    - Burlington farmers market
    - Old North End farmers market
    - Montpelier farmers market
- Response 3
    - Burlington farmers market - x12
    - Old North end farmers market - x3
    - Ethan's farm stand - x3
    - Intervale food hub
    - Stowe farmers market - x1
    - Winooski farmers market - x2
- Response 4
    - Jericho Settlers farm - x1
    - Joe Donegans farm - x4
    - Paul Mazzas - x1
    - Richmond - x6
    - Burlington - x6
    - Winooski - x6
    - Shelburne - x3
    - Champlain Orchards - x2
- Response 5

  - Burlington farmers market - x7-8
  - Winooski farmers market - x1
  - Intervale CSA
  - Paul Mazzas farmstand
  - Milton farmers market
  - Old North End farmers market
  - A farm my friend works at has a CSA but I can't remember the name. It's in Richmond.
  - Something Moon farm CSA
- Response 6
  - Full Moon farm - weekly CSA subscriber
  - Intervale farm
  - Mazzas CSA
  - Mazzas farm market - x2
  - Burlington farmers market - x2
  - South Burlington farmers market
  - Shelburne farmers market
- Response 7
  - Mazzas farm stand
  - Burlington farmers market - x3
  - Winooski farmers market - x1
- Response 8
  - Jericho Settlers farm
  - Davis farm - x52
  - Mazza's - x3
  - Milton farmers market - x10
  - Burlington farmers market
  - Winooski farmers market
  - Richmond farmers market
  - Family cow farmstand
  - Full Moon farm
  - Adams berry farm
  - Owlshead Blueberry farm
- Response 9
  - Intervale food hub
  - Intervale Comm farm - x52
  - Mazza's CSA
  - Mazza's farmstand
  - (name?) Milton farm stand - x1

- Burlington farmers market
- Milton farmers market
- Winooski farmers market

The frequency of shopping at direct markets for focus group location:

CHITTENDEN COUNTY	How Many Total	Avg. Listed	Avg. Listed % of total	Avg. # Shopped At (in last 12 months)	Avg. Shopped at % of total
Farmers Markets	7	3.67	52%	1.56	22%
Farm Stands	18	2.89	16%	1.22	6.8%
CSAs	18	2.22	12%	0.56	3.1%
TOTAL	44	8.78	20%	3.34	7.6%

<u>Direct Markets Awareness Questions:</u>

D. Written Down

Directions: *"Please write the letter 'D' in the upper right-hand corner. Leave space to answer three questions. If you need space you my go onto the back of your card."*

1. *Please describe what you like most and like least about a farmers market.*
    - Most: support local businesses, delicious and healthy products, samples. Least: expensive
    - Most: friends, fresh produce, fresh local meat, music, community. Least: expensive prepared foods
    - Most: variety of producers. Least: expensive
    - Most: Good community atmosphere, fun, talk to farmers. Least: seems pricey (but haven't been in a while)
    - Depends on the market but the Burlington farmers market has too much prepared food. I like a 60/40 mix of fresh to prepared food.
    - Like most - fun festival kind of vice, variety of products, supporting local economy. Like least - these days there seems to be more junk food and arts and crafts than local produce available
    - Most: happy people. Least: finding pesticide laden food
    - Most: freshly picked (same day) sometimes. Least: limited selection.
    - I like the samples, the variety, being able to access many different types of food and produce, baked goods, the community coming together. I know the Burlington one is strict about having ingredients from VT which I love. I don't always like how expensive things are; it's hard for me to spend extra if I don't know what I like it.

2. *Please describe what you like most and like least about a farm stand.*
    - Most: local business, good seasonal products. Least: depending, price.
    - Most: variety of fresh local food on my route home. Least: Sometimes expensive and out of the way.
    - Most: Talking with farmer. Least: Far away from me
    - Most: same as above; seems a bit cheaper. Least: less variety probably
    - I like farm stands when they have a personal touch. Small-ish scale.
    - Like most - food is about as fresh as it gets. Like least - nothing really comes to mind.
    - Most - talking to the grower. Least - finding the pesticide laden food
    - Most: Fresher than the store produce. Least: remote locations for me.
    - I like the convenience and being able to interact with the people who grow the food. Again, food seems to be more expensive, and I don't feel like I know enough about growing practices to be sure that the quality and safety is that much better.

3. *Please describe what you think a CSA is, and what you like most and least about a CSA.*
    - Most: local business forces you to be creative and seasonal with cooking. Least: not always a lot of choice of products
    - Most: Community supported agriculture, buy in advance, local harvest, new foods. Least Up front, can't eat it all
    - Guaranteed produce weekly. Most: don't have to think about it. Least: Selection of veggies
    - CSA= supporting local farmers / economy; convenient way to get food; sustainability. Most: price, convenience (don't need to choose food). Least: none? Sometimes not a lot of variety
    - Paying for a share with no voice and no control. I just don't like the idea.
    - Buying a share in the farms output. Like owning stock almost =) I like the variety of food and the quality. Like least - nothing really. We've enjoyed our weekly share as long as I can remember.
    - Community supported agriculture. Sharing the risk of growing with the farmer. Most - variety and abundance. Least - losing crops to weather, pests.
    - CSA - share, pay up front for set amount of food. Not exactly sure what they are. Usually too much upfront money for me

- CSAs are farm share deals, you get a box of produce on a regular basis. I love the idea + would like to try it but worry I wouldn't use it all / get my money's worth or that it would be too expensive.

<u>Product Attribute Questions:</u>

E. Written Down - Tomato question
Directions: *"In the upper right-hand corner, please write the letter 'E.'*

1. *All things equal, if you had to choose between a tomato sold at a farm stand and a tomato sold at a grocery store, what would you choose? What factors did you base that decision on?*
    - Farm stand; less toxic chemicals, fresher, better taste
    - Farm stand; I would expect them to be fresher
    - Probably the grocery store, because I would be shopping for all of my other groceries at the same time. I would like to know more about how the farmer profits from each location and what the difference is because that could change my answer. I do want to support the local economy as much as possible.
    - Farm stand; more money for farmer
    - Farm stand; all things being equal - the farm stand tomato is more likely to have traveled a lot less farther than the grocery store and will taste better
    - Farm stand; I assume it's fresh. Less hands on the product. Less time for damage.
    - Farm stand; because it is local business
    - Farm stand; direct relationship with the farmer no middle person. No extra transportation.
    - No preference if equally convenient

Open Ended Question

1. *If you have shopped for food at a farmers market, did you find what you were looking for?*
    - Depends on which market…Essex Junction – prepared foods, community oriented. Sometimes I would get meat at the Essex J one, kids would get pizza
    - What can I get here? Find something and then buy it. Do not have a goal
    - Do not go to a farmers market with a list

- I do not usually go to the farmers market to buy produce…disappointed there wasn't any produce at Essex J. Don't usually go there seeking specific items
- Seek out specialty. Using them to eat different vegetables. I declared June Asparagus month. Eating raw asparagus. I would never do that at Hannafords. The guy picked it that morning! I go there and see what I can find
- I do not go with an agenda. It is an outing or to get baked goods. Get samples and come back to it.
- Just excited to see what is being offered
- I do not go with a list…when I lived right across from the B. FM I get overwhelmed by the choices. When I found the Old NE one, I liked the scale of it. I wish some of the markets branded themselves differently.
- Too big and overwhelming.
- The farmer discontinued a product because no one was eating it. If everyone is buying potato chips and junk food, then the farmers won't be able to compete. Some farmers are not regular and you can miss them. I don't have time to
- Hoping for strawberries one week too late.

F. Written Down Question

Directions: *"In the upper right-hand corner, please write the letter 'F.'*

1. *Please write down, in order of importance, 1-3 variables you look at when deciding to buy produce.*
    - Color, bruiseless, price / where it's from
    - Local, price, freshness
    - Looks and feels high quality, right level of ripe, cost, knowing where it comes from
    - Organic, freshness, price
    - Affordable, quality, local
    - Looks good, clean, local
    - Price, how long it will last, taste
    - Local, organic, looks fresh
    - Organic, local, price

2. Please write down, in order of importance, 1-3 variables you look at when deciding to buy meat.

- Where it's from, organic or no hormones, antibiotics, price

- Local, grassfed or not / organic or not, price
- Cost, quality (though I'm not well-versed in meat so I don't always know), Knowing where it came from
- Price, natural / organic, local
- Not highly processed, affordable, nutritious (lean meat and fish)
- Fresh, clean, local
- Price, taste, how long it will last
- Price, taste, how long it will last

<u>Price Questions:</u>

G. Written Down - Cucumber question
Directions: *"In the upper right-hand corner, please write the letter 'G.'*

1. *Imagine yourself at the grocery store. You find a $1 cucumber. How much would you pay for an organic cucumber?*
    - I would never buy a cucumber organic or not
    - Organic - $2
    - $3
    - $1
    - Organic more $?
    - Organic: max $1.50 / each
    - $1.50
    - $1.05
    - $1.50

2. *How much would you pay for a locally-grown cucumber?*
    - I would never buy a cucumber locally grown or not
    - Local - $2
    - $2
    - $1.19
    - Local more $?
    - Local: max $1.50 / each
    - $1.50
    - $1.19
    - Locally grown up to $2.00

3. *How much would you pay for locally-grown organic cucumber?*
    - $4

- $3
- $1.19
- Local and organic more $$?
- Local + org: max $1.75 / each
- $2.00
- Locally grown and organic up to $2.75

4. *Now imagine yourself at a farmers market. Do you think a cucumber at the farmers market is more, less, or the same price as this $1 cucumber?*
    - Would depend on the time of year
    - More
    - Same
    - More
    - More
    - More
    - Same
    - More

5. *At a farm stand…Do you think the cucumber at a farm stand is more, less, or the same price as this $1 cucumber?*
    - Would depend on the time of year
    - More
    - Same
    - Same
    - More
    - Less
    - Unsure
    - More

6. *In a CSA basket…Do you think the cucumber in a CSA basket is more, less, or the same price as this $1 cucumber?*
    - Would depend on the time of year
    - More
    - Less
    - More
    - More
    - Less
    - Less
    - Same

Values and Beliefs Questions:

H. Written Down
Directions: *"In the upper right-hand corner, please write the letter 'G.'*

1. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the produce you buy in grocery stores is good for your health?*
    - 6 not local, 8 local
    - 10
    - 5
    - 8
    - 3
    - 5
    - 1
    - 6
    - 5

2. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the meat you buy in grocery stores is good for your health?*
    - 8 if local only, 1 if not local
    - 10
    - 5
    - 8
    - 3
    - N/A
    - 2
    - 5
    - 5

3. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the produce you buy at farmers markets, farm stands, and CSAs is good for your health?*
    - 8
    - 9
    - 8
    - 10
    - 8
    - 9

- 8
- 7
- 7

4. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the meat you buy at farmers markets, farm stands, and CSAs is good for your health?*
    - 8
    - 9
    - 9
    - N/A
    - 8
    - N/A
    - 9
    - 6
    - 7

5. *On a scale of 1-10, 1 low and 10 being high, how important is your relationship with the farmers who grow your food?*
    - 10
    - 0
    - 7
    - 5
    - 5
    - 9
    - 10
    - 1
    - 2

<u>Lifestyle Questions:</u>

Open-Ended Question

1. *How often do you buy things you do not know how to cook?*
    - Sometimes I deliberately choose to do a recipe that I learn how to cook
    - I figure I can just go home and google how to

Think Back Question

1. *Think back to a time when you decided to change your eating habits. What motivated you to make this change?*

- Documentary on Netflix…"What the Healthy" Made a lot of compelling arguments about what the animal products do to your health
- Made a lot of salads because I was always feeling tired. Could not find salad greens that lasted long enough to sustain this habit
- I grew up with fast food every night and did not place a lot of value on food. "I'm a grownup now, time to do something different"
- Searched for a diet to fix digestive problems on the internet
- After being with my vegan girlfriend, I felt guilty eating a steak. It's a discipline game

2. *How did your shopping habits change?*
    - Bulk group food.
    - Stopped buying frozen food and fast food. Eyeballing food that look
    - Did you shop different stores? Yes
    - Did you spend more or less? Yes – you can go broke trying to eat healthy

CSA Open-Ended Question

1. *If you have a CSA, or have had a CSA in the past, how is/was your shopping different? You're eating?*
    - Yes to both – you ate what was there…bread, eggs, meat. It was expensive but I enjoyed the variety. The share was too big – even the small share so I tried to split it with someone else.
    - CSA is kind of like a shareholder. You pay at the beginning of the season and if they have a good year, you get a lot. If it was a bad year, you do not get as much
    - Takes more discipline to have a CSA, it is a surprise every week. If I did not have Pinterest on my phone, I would not have been as successful with it
    - Barrier: Very seasonal. Not a very experienced cook, hard to break out of the idea that I would not be able to cook the things in the CSA
    - Changed gardening habits
    - Became more adventurous….I forced myself to eat the things I did not like originally. Forced to prepared them.

Farmers Market Open-Ended Question

1. *What are some barriers keeping you from doing some or all of your grocery shopping at farmers markets?*
    - Money
    - Convenience – it is a day event. Can't carry food

- Variety
- Habitual eater – breaking habits is hard. "I cannot go to a farmers market and get turkey. I have cravings that are not being met at farmers markets
- I know that I have the perception that
- Food does not last as long

Farm Stand Open-Ended Question

1. *What are some barriers keeping you from doing some or all of your grocery shopping at farm stands?*
    - There are not any nearby
    - I do not trust the farmers at my farm stand

<u>**Ending Questions (15-20 minutes):**</u>

All Things Considered Question:

1. *Suppose you had one minute to talk to a governmental official about direct markets in Vermont, the topic of today's discussion. What would you say?*
    - Tell them to talk to someone more knowledgeable
    - I have a CSA and I know that it works for me
    - Consider regulations that make it easier for farmers to get their produce closer to people who want it
    - Balance regulations
    - Strict "agri-business' regulations for BIG companies do not translate well to local, organic farmers who are smaller.
    - Whatever you can do to make it as easy as possible for local farmers and food business to thrive…farmers, ethnic foods, foodies…we can all benefit from local, creative, delicious food. Encourage consideration of soil and water quality
    - More small business loans for farming. I like the CSA model because it is easier for the farmers. Want CSAs to include bread, meat, eggs, milk so you can get more of your groceries. Need more farmers for the demand of local food here in Vermont.
    - Learned a lot through the infrastructure that is set up for me. Farmer is a tough guy to talk to. Love going to City Market because someone has pre-vetted the foods. To be dubious about buying from DMs. Is driving to a farm stand as efficient as buying everything at one location
    - How much is it taking away from

- Vermont has done a lot already to help small farmers. Processing chickens and raw milk…forward thinking. The small farmer is a draw for people to come to Vermont. Wholesome. It was super hard to set up her daughter at the farmers market without having to worry about legal issues
- Support the local economy
- Go after McDonalds and tax them like cigarettes because they are ruining the health of people. Even the playing field so the farmers can compete. Learn to choose the good. Education! A battle against money.
- If I was talking to a friend, recommend getting a CSA (if you can afford it) it's a really good idea. I have really strong concerns about sustainability and we are lucky to live in a state with a strong local agriculture.

2. *Given what we've discussed today, what would make you more likely to purchase more of your food from direct markets?*
    - Grew tiresome of having to drive so far to pick up CSA. Less time and energy, more likely to do it. "It's on my way"
    - Not feasible to get out of Burlington if you're economically challenged without a car
    - It would be easier if I did not have to grill the farmer about their practices. Wish she knew the practices upfront
    - Cooking shows use local food make it socially cool
    - Convenience and knowledge (my own project). I have a perception that everything is more expensive, but I have not done my research. Trader Joe's surprise. Compare prices. "I'm going to get ripped off"

Final Question:

The moderator reviews the purpose of the study:

- Northeast Organic Farmers Association of Vermont
- Marketing research project about how to increase sales of locally-grown food sold at direct markets: farmers markets, farm stands, and CSAs.
- The results will be used to inform marketing messages to increase sales of locally-grown foods sold at these direct markets.

And then asks:

1. Have we missed anything?
    - Get confused about what the definition of organic means. "Organic Maple Syrup?" Help clarify what is truly organic.
    - Tons of deception about the wording to describe the food

Windsor County Focus Group

Date: September 23, 2017
Location: Upper Valley Food Co-op White River Junction, VT
Time: 10:00-11:30AM

Roles
Moderator: George Schildge
Assistant Moderator: Katie Lukes
Observer: Alissa Matthews, Agriculture Development Coordinator at Vermont Agency of Agriculture

Vermont Locally Grown Food Messaging:

1. *What comes to mind when I say locally-grown food?*
    - Fresh, Beautiful, Ethical
    - Food grown within 50 miles or ideally less of the area it is purchased in. Possibly grown by someone I know
    - CSA provides access to locally grown food
    - Local farmers, producers, from within 50-100-mile radius
    - Farmers market - farms
    - Good
    - Grown in VT/NH, not shipped here from anywhere else

Frequency: Food sold close to where it was grown 50-100-mile radius, farmers
Big Idea: Respondents think grown close to home, and also included direct markets in their responses.

2. *What comes to mind when I say farm fresh food?*
    - Sometimes a marketing gimmick, too general
    - Fruits and vegetables, picked within 24 hours of sale
    - Corn! Healthy, often organic
    - Don't really know what that means - sounds a bit like a sales pitch/marketing label
    - Just picked, etc.
    - Good - fresh, nutritious

- Straight from a nearby/on-the-grounds farm to consumers, hasn't sat in a store for days

Frequency: Picked, marketing

Big Idea: Recently picked food. Two respondents believe it is a marketing gimmick or pitch

3. *What comes to mind when I say organic food?*
    - Expensive, but often worth it. Healthy
    - Grown following practices that have minimal impact on the environment and in harmony with it
    - Healthy, chemical-free
    - Produced using organic principles, want to check for certification too
    - No pesticides used
    - Toxin free
    - No chemicals/pesticides used, just dirt, water and sun :)

Frequency: healthy, pesticides, expensive

Big Idea: Respondents understand that no pesticides or chemicals are used. The only person who wrote expensive included that it is 'often worth it.'

4. *Are you more likely to buy something if it was grown in Vermont? Why or why not?*
    - Yes! Vermont means clean, healthy, small, local
    - Yes, because I live in VT - want to keep dollars local. Caveat: Living in the Upper Valley = NH is "local" by my definition too
    - Yes, agricultural practices support in state business, less travel time, freshness
    - Yes - want to support local producers, local economy, sustainable agriculture, earth/climate impact
    - Yes, because it means local more than Maine, Idaho, etc.
    - Yes, I prefer locally grown produced food for better quality and lower carbon footprint
    - Yes - I know it's fresher than getting it from anywhere else

Frequency: Yes, local, support, carbon footprint/impact

Big Idea: Respondents said they buy local because it means keeping dollars local, lower environmental impact, fresher

<u>Open-ended question: Shopping Patterns:</u>

1. *Where do you buy fresh produce?*
    - The Hanover Co-op, Farm stands that are local to me

- Depends on the time of year, the co-ops, crossroads/Killdeer farm stand, farmers markets
- Sterns produce
- Sterns "its fresh and its most cost effective, Hannafords, farm stands
- FM, Hanover co-op, Hannafords,
- CSA member, Sterns, co-ops, Hannafords, "a stray farmers market, if I'm out."
- CSA, "a cute little couple that sells corn on the side of the road. "I try to be opportunistic about where I shop

Frequency: farm, Stern's, Hannafords, Co-ops

Big Idea: Respondents buy fresh produce from a mix of places including grocery stores, co-ops, and direct markets

2. Where do you shop for locally-grown produce?

- Hannafords "they do have a lot of locally-grown food"
- Eliminate Sterns from my list, they go down to Boston; Crossroads farm stand, some things will be local

3. For what reasons you buy local food?

- I like knowing where my food comes from, getting my farmer's input on food. "I asked my farmer how to prepare baby food for my daughter. I like to keep my dollars local but need to be mindful about my budget
- I like supporting local business agriculture, that is important to me
- The farmers market is right at my work on Wednesdays, seeing familiar faces at the farmers market is nice because I am new to the area
- It's nice to know that when you drive around Vermont, you see farm stands everywhere you go; "I consider locally Just My State"
- Supporting a different kind of economy, sustainable scale
- If they aren't trucking stuff in, that is less pollution. I like just grabbing food at a local farm stand on my way to yoga
- Reduce the carbon footprint is extremely important to buying local

Frequency: local, supporting, farmers, nice

Big Idea: Respondents see buying local as a way to lower their environmental impact, like keeping their dollars local, keep it small scale

<u>Shopping Habits Questions:</u>

1. What kind of shopper are you?

- I'm a bit of a disorganized shopper. I'm not good at going through each aisle and getting what I need first time around; I typically have to go back to get something I forgot. I try to buy things in bulk if I can (non-fresh items since I live alone). If I shop when I'm hungry I make poor choices
- Different under different circumstances
    - Shop in categories - veggies, fruit, salad stuff weekly - whatever looks good
    - Shop for specifics when I need a particular ingredient
- Wholesome meals, lots of veggies, not so much box or prepackaged meals. Am old school and rather experiment as well as less sodium, no MSG, etc. Don't like "canned" stuff unless home canned, not in shelf items
- Try to find best quality (nutrients, organic, as local as possible) food to have the biggest personal collective impact through my purchase/choice. Will choose non-processed foods, fair-trade, organic in smaller quantities vs. larger quantities or discount prices. Food is a major health choice, priority. Worth the $
- Price conscious, but will pay more for quality. With lists, don't vary much off the list. Shop the ads. Buy local
- I try to be mindful with where and how I spend my dollars. I look for "deals" within the framework of supporting local and buying organic as much as possible. I am somewhat limited in what I have access to and by budget, but I'm generally satisfied by what I find
- I shop often, every couple of days. I keep a list on a white board with 2 others at home. I'm not a very good planner so I do some unnecessary purchasing. I buy organic carrots and celery and try to buy "local" antibiotic-free chicken and meat. Often, I'm in a rut I try to buy the co-op brand.

Frequency: Try, buy, organic, local, need

Big Idea: Some respondents do seek out local and/or organic items when shopping for food. Others are price conscious, or they are trying to adapt eating local and organic to a budget.

<u>Direct markets convenience questions:</u>

1. *Make a list of all the direct markets (farmers markets, farm stands, CSAs) you can conceivably shop at.*
    - Respondent 1:
        - Cedar Circle - 20
        - Crossroad - 4
        - Norwich FM - 3

- Sweetland Farm - 0
- Ten Zen (NH) Farm - 0
- Shire Belf – 1

- Respondent 2:
    - Crossroads - At least 2x/week since June
    - Wellwood Orchards - 2
    - Edgewater Farm - 0
    - Locals offering produce by the road - 2
    - Pete's Farm Stand Walpole - 1
    - Norwich FM - 4
- Respondent 3:
    - 4 Corners Farm - 4+
    - Sunrise Farm - CSA member, weekly May-October, 1x/month November, December
    - Killdeer Farm - 0
    - Edgewater Farm - 0
    - Long Wind Farm - 0
    - The local couple up the road - 1
    - Clay Hill Farm - Connected with Sunrise
- Respondent 4:
    - Crossroads - 3
    - Killdeer - 3
    - Norwich FM - 2
    - Farmer Hadges – 3

- Respondent 5:
    - Co-ops - 2-3x's/week year-round (UV, Montpelier, Burlington)
    - Crossroads - 6-8x's this summer
    - Norwich FM - 4
    - West Hartford - 2
    - Hanover - 2
    - Lebanon - 0
    - Clay Hill - 0
    - Killdeer/Crossroads - 0
- Respondent 6:
    - Norwich FM - 5
    - Crossroads FS - 8
    - Ainsworth FS - 4
    - Sweetland Farm - 1

- So. Royalton FM - 0
- Respondent 7:
    - Hanover FM - 6
    - Norwich FM - 1
    - Crossroads FS - 0
    - Hartland FM - 0

The frequency of shopping at direct markets for focus group location:

WINDSOR COUNTY	How Many Total	Avg. Listed	Avg. Listed % of total	Avg. # Shopped At (in last 12 months)	Avg. Shopped at % of total
Farmers Markets	8	1.29	16%	1	12.5%
Farm Stands	10	3.29	33%	2	20%
CSAs	13	0.29	2%	0.29	2.2%
TOTAL	31	4.87*	16%	3.29	11%

FS: Deep Meadow Farm, Blais Produce Farm, Randolph Farm Stand, Crossroad Farm Stand, Dutton, On the Edge, LeClair Acres, Cedar Circle Farm, Long Bridge
FM & CSAs: From NOFA website

<u>Direct Markets Awareness Questions:</u>

1. Please describe what you like most and like least about farmers markets.

- Most: local, fun atmosphere, good variety. Least: Can run out of good items quickly, some only take cash
- Most: Quality of food, social interaction. Least: Another stop shopping
- Most: Be able to get food directly from farmer and thank them in person. Least: Scheduling my time to get to them when open
- Most: Freshness of produce and products. Least: Sometimes crowded and hours sometimes don't fit my personal weekend schedule
- I like most having a variety of famers/products to choose from. I like meeting more farmers. I don't like how few are near me.
- Most: Access (near), fresh items, social/community. Least: Limited time, cost
- Most: Local, fresh and varied offerings + fun people. Least: Expensive and often crowded

2. Please describe what you like most and like least about farm stands.

- Most: You know it's local and you're directly supporting a farmer. Least: Hard to find/know their hours, etc.

- Most: Quality of food, social interaction. Least: Another stop shopping
- Most: Be able to get food directly from farmer and thank them in person. Least: Scheduling my time to get to them when open. Hit or miss, takes more driving, special trip or opportunistic shopping, when may not need food.
- I like meeting the people who run farm stands. I don't like parking - usually limited
- Most: Fresh, usually cheaper. Least: Not always organic
- Most: Beautiful, fresh and varied offering. Least: Sometimes I feel a bit uncomfortable.

3. Please describe what you think a CSA is, and what you like most and least about a CSA.

- What it is: Random mix of food sent to you. Most: Local, easy to get straight to you. Least: Can't pick what you want, what if you're not home for delivery??
- Community Supported Agriculture. Most: Fresh organic produce in variety. Least: Uneven quantities, not always easy to prepare a meal
- Community Supported Agriculture. Most: Supporting agriculture, investing $ in food in advance to support farmers. Be able to get food directly from farmer and thank them in person. Least: Lack of choice, logistics, timing
- Not sure - Co-op Share Association? Can't compare, never been a member
- Community Supported Agriculture. You pay upfront to fund the farm's upcoming efforts. I most enjoy feeling like it is "our" farm and knowing our farmer. I don't like that it isn't year-round!
- Supports local farmers/agriculture and makes fresh foods available to community. Crossroads debit card, buy whatever vs. typical CSA. Most: Fresh food, all season. Least: Cost
- CSA is buying into the farmer's production in advance. I'm not sure my family would eat it all.

J. Tomato Question

1. *All things equal, if you had to choose between a tomato sold at a farm stand and a tomato sold at a grocery store, what would you choose?*
    - Farm stand - more direct benefit to the farmer
    - I would choose to buy the farm stand tomato because I would like to put my dollar directly into the hands of the grower. Plus, I could ask them about the tomato!
    - Farm stand - Know where it came from, supporting local business, assume freshness - picked daily

- Prefer farm stand for local produce. Not fresh or organic, less flavor in grocery store.
- Farm stand better than grocery store because of freshness and organic. However, if I am at grocery store, I would just get it to save a stop and money.
- Go to farm stand. Pyramid of priority: Local, organic. Local, non-certified organic. Regional organic or fair trade. Far away organic or fair trade. Least likely: Commercial agriculture and corporate store and not organic
- Grocery store - best chance of not having bugs/defects

Open-ended Question:

2. *If you have shopped for food at a farmers market, did you find what you were looking for?*
    - If I went there with the intention…I can never find meat there. I came from Texas, we eat meat
    - I often find things I was not expecting to get
    - I go with what's in mind with my menu for the week
    - I have a good idea of what I am going to find. Sometimes I am disappointed and need to find someplace else
    - It depends on what time I go. If I go later, I cannot find as much as I wanted to. I need to go at the beginning
    - I tend to go "forage" I see what's there and see what I like
    - I do not usually go with a set plan. Being rigid in what I wanted was not what I could do. I need to go with the season and ask the farmer what they recommend. It's like going to the library. I do not go with a plan, I just find a cover I like and get it

<u>Variables Questions:</u>

1. Please write down, in order of importance, 1-3 variables you look at when deciding to buy produce.

- Look of healthy vegetable/no rot
- Looks, feels and smells fresh. Trustworthy source. It is in season.
- Local, organic. Non-local, organic, fair trade. Regional, organic, non-certified but organically grown.
- Looks fresh, feels fresh, smells fresh. Cost.
- Freshness/condition of item. Cost. Availability.
- Organic. Local. Quality -> affects how I consider cost/value.

- Looks fresh. Local. Organic.

2. Please write down, in order of importance, 1-3 variables you look at when deciding to buy meat.

- Clean
- Expiration date. Trustworthy source. Amount (do I have to freeze some, can I use it all right away)
- Local, organic. Regional, sustainably grown. Sustainably grown or harvested (fish-wise)
- Looks, feels fresh - not discolored. Not too fatty. Cost.
- Fat content. Color/freshness. Cost.
- Transparent farming practices. Local. Quality -> affects how I consider cost/value.
- Antibiotic free. No additives. Price.

G. Cucumber Question

- Respondent 1:
  - Organic: 10% More: $1 Conventional $1.10 organic
  - Locally-grown: Same as above
  - Locally-grown organic: no response
  - FM: Depends on the season
  - FS: Depends on the season
  - CSA: Should be less, but in CSA products not priced individually
- Respondent 2:
  - Organic: $2-3
  - Locally-grown: $2
  - Locally-grown organic: $3
  - FM: More by a small amount
  - FS: More by a small amount
  - CSA: Depending on how the crop went it would likely be about the same or a little more
- Respondent 3:
  - Organic: I would pay up to $3 for organic
  - Locally-grown: I would pay up to $2 for local, non-organic
  - Locally-grown organic: I would pay up to $4 for local, organic
  - FM: Will probably be a little more as commercial grocery stores drive $ down
  - FS: May be more depending on supply/season

    - CSA: Probably more because CSA share is supporting a more holistic economic model
- Respondent 4:
    - Organic: $3
    - Locally-grown: $2.50
    - Locally-grown organic: $3
    - FM: More than $1
    - FS: More than $1
    - CSA: Same as $1
- Respondent 5:
    - Organic: $1.25
    - Locally-grown: $1.25
    - Locally-grown organic: $1.50
    - FM: Same price, $1
    - FS: Less than $1 (although depends on Farm stand)
    - CSA: More
- Respondent 6:
    - Organic: $2
    - Locally-grown: $2
    - Locally-grown organic: $2
    - FM: More
    - FS: Same
    - CSA: Less
- Respondent 7:
    - Organic: Not more than $1.99
    - Locally-grown: Usually about $1
    - Locally-grown organic: Not more than $1.99
    - FM: About same price, depending on seasons
    - FS: About same
    - CSA: Cheaper I'd think for CSA

<u>Values and Beliefs Questions:</u>

1. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the produce you buy in grocery stores is good for your health?*
    - 2-3
    - 6
    - 8 - or I wouldn't get it!
    - 5

- 3
- 8
- 8 because I tend to buy as local/organic as possible

2. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the meat you buy in grocery stores is good for your health?*
    - 1-2
    - 6
    - 5, depends on meat
    - 5
    - 3
    - 6
    - 8 if organic, same reason as above, if conventional – 2

3. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the produce you buy at farmers markets, farm stands, and CSAs is good for your health?*
    - 7-9
    - 10
    - 8
    - 8
    - 9
    - 9
    - 10 because I have a personal connection and can ask questions

4. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the meat you buy at farmers markets, farm stands, and CSAs is good for your health?*
    - 7-9
    - 8
    - 5
    - 7
    - 7
    - 7
    - 10 because I have a personal connection and can ask questions

5. *On a scale of 1-10, 1 low and 10 being high, how important is your relationship with the farmers who grow your food?*
    - 6-8
    - 6

- 10 - got to be trusted
- 6
- 5
- 7
- 10

6. *On a scale of 1-10, 1 being low and 10 being high, when produce is in season, how important is it for you only buy it local?*
    - 7-8
    - 10
    - 8 - depends on what I need
    - 8
    - 10
    - 7
    - 10 - we try our hardest to eat/shop this way

Open-ended question:

1. *How often, or for what reasons, do you buy things you do not know how to cook?*
    - Not that often, but not never; I am just looking for variety. I am in a big rut and I would like to learn how to cook other things
    - Different phases of my life. I like recipes near where I find the food
    - 3/10 times. I like experimenting. I like my grandkids to know that you can't just live on strawberries. If you do not introduce them to them they will never know
    - If I see something I have never seen before, I usually jump on it. At my age I have lived all over the world and I have seen a lot
    - I am just out of grad school so I have time to cook. I am trying to buy more things that I haven't worked with before
    - I am not very adventuresome, but when I do try things it is more recipe related
    - I like this co-op because we found the almond meal and the pecan meal because now I use it for everything
    - Less frequent now than it was before. The CSA we are with now, it forced us to be adventuresome. But that's good! We have always loved to cook and want to model that for our daughter.

Open-ended: Think Back Question

1. *Think back to a time when you decided to change your eating habits. What motivated you to make this change? How did your shopping habits change?*
    - My kids were very allergic milk and eggs and wheat. Had to read the ingredients on everything and change the way I cooked. You can't buy pre-prepared food that does not have those ingredients in it. Since then, I have never gone back.
    - Having diabetes helped change my eating habits. Became more into fruits and vegetables and got more into the nut meals. I use them on everything. After that, I started getting my family into eating better.
    - Health. Cancer and Celiac disease (gluten-free). I just don't eat flour products. Everything in a grocery store is processed
    - I became a vegetarian for animal welfare reasons. Watched some documentaries. No longer one now – no one else in my family was a vegetarian so I had to get down on the basics again.
    - We ate out a lot. Everyone could get their own dish. When you're working – it's chaos. Convenience.
    - A lot of little tweaks, when I went to college I changed for convenience but was taught to eat my fruits and vegetables. Shopping habits were the same. Putting down roots and getting a CSA was a relief because it cut down on the grocery shipping
    - Weight related
    - Getting a full-time job – "mac and cheese is inexpensive" Now I have a full time pay and I buy all the food groups. Having the means to actually go to the grocery store with a pay check
    - Part of the accessibility is being able to pay for it

CSA Open-Ended Question

1. *If you have a CSA, or have had a CSA in the past, how is/was your shopping different? You're eating?*
    - The CSA when I got the box, it was stressful. I had to find out what I got, and then supplement it from the store. I wanted to figure out how to make it with kids and work. I won't go back to a farm CSA because I hated how much I wasted and driving everywhere
    - Killdeer CSA works for menu planning
    - Sunrise Farm. Half shares and full shares. Farmer sends out an email with 2 different pickup dates. A "Dartmouth educated farmer" We were able to

avoid a lot of waste that way. If you are in the CSA, there is a farm stand there with milk and cheese and honey, etc. Already here and not driving extra.

- It was too much. Killdeer/Crossroads is great. What do I feel like for dinner? I pick up what I need. I do it a day or every other day. It stays fresh. Add money to the debit card with a 10% discount up front, it goes down. It is on my terms. They have other groceries on her card. Label their food – Organic and conventional. It is all about the approval process.
- The produce is lovely, the atmosphere
- CSA at grad school started by students. Brought fresh produce to food gardens. $3, $5, $10/ week and got 7-10 pieces of produce. It was great for me because I would get what I needed. It was convenient. *On Campus in MN*
- Box full once a week – being surprised by some of the things I got; no control over quantities that I got. Sometimes small amount or overall…I just did it out of local commitment or something. I would LOVE to do that debit card. It would meet my preference

2. *What are some barriers keeping you from subscribing to a CSA?*
    - My worry is "what would I want to do with all this stuff". You feel bad when your hard-earned money goes to waste
    - Financial reasons
    - Perception that I would get a lot of produce that I would get a lot of produce that I would not know what to do with. Other people in our household are not that into vegetables. I get stuff from a friends garden

Farmers Market Open-Ended Question

1. *What are some barriers keeping you from doing some or all of your grocery shopping at farmers markets?*
    - Being new, people tell me to go to the Lebanon FM, I do not know where they are. I look online and I can't find them. Not knowing where to find them
    - Price.
    - Bradford tried unsuccessfully to have a FM. Not a lot of produce because 2 established farm stands already. Too far to go to Norwich to supplement other food
    - I don't think they have everything I want. I think it's more expensive, but you get a lot of ambience
    - Timing and volume. I don't eat enough

- Higher prices, Granddaughter likes to go to farmers markets and you're not going to find a hot dog or chicken nuggets for a 10-year-old meat eater
- Set time, heavy traffic, parking – barriers! When I am shopping I am very task oriented. I don't care about the ambiance – get out of my way!

Farm Stand Open-Ended Question

1. What are some barriers keeping you from doing some or all of your grocery shopping at farm stands?

- Timing, transportation, meal planning challenge, its opportunistic when I do go. It happens when things align and converge
- I love to cook and bake – I am so happy that fall is here; I like to share my food and I can't find everything I need there
- Opportunistic. Where I am and what I need. Sometimes I go specifically, other times I don't
- I do not know where they are. I am not one to spontaneously pull over and stop
- Access. When I see them and I am driving, I stop. Doing errands
- We are spoiled with our CSA. It would be to fill in a gap. Having lived other places, I take it for granted that I can just pop over to a FS. I would choose a FS over Hannafords – if it is open.
- Lack of convenience. You have to drive to get what you needed.

All Things Considered Question:

1. Suppose you wanted to invite a friend with you to a farmers market. What would you say?

- Just say "do you want to go?"
- It's fun, there was produce, baked goods, all kinds of different things, a community, people-watching, she loved it
- Hey you wanna go? If they don't have anything they always have fresh lemonade
- A form of entertainment to take out-of-town guests to the Norwich farmers market. For them it's an experience, for me it's killing 2 hours. While I am there I will take advantage of, but it isn't something I would normally do
- I usually go with friends. My friend goes there specifically for the delicious warm donuts.
- We send a lot of Airbnb guests to the farmers market. More of a way to connect with friends who sell at the FM.

- A lot of out of towners visit. Norwich FM is what we always do with them. We get up in the morning, have a little coffee. We then get breakfast and we walk around and figure out what we want to cook for dinner. 4 counties – end of subject. Very unique. Looking for a fun gift for someone, pottery yarn, wax. A good gift shopping place
- On good weather Saturdays, it's like a playgroup - kids everywhere

2. *Given what we've discussed today, what would make you more likely to purchase more of your food from direct markets?*
    - Access and cost.
    - Listing the DMs made me think about…do need car, certain amount of money to shop at many of them. Hours of operation impact it
    - Love the debit thing. Make it a part of my routine. Knowing the people who work there, I like the social aspect.
    - Vital communities puts out an email resource about the DMs in the area…wishes it were online. When the information is in my life, I tend to do more to make an effort to buy DM
    - I'm more old school – I read it or see a flyer. I can't wait to get a car and start going around to the farmers markets again
    - Time and emotion and easy access and convenience, cost and variety
    - Learned a lot from this focus group
    - Doesn't NOFA do something online?

Final Question

1. Have we missed anything?
    - When it comes to chicken and meat – I find the whole thing very opaque.
    - Sustainability is something that is very important. This movement is more important than the organic movement. We need to be sustainable
    - Because of where I worked, where they provided my CSA and local food accessible
    - Multi-media subscription, information – where can I find this stuff? I would love ads in a newspaper about FM FS CSAs better than a "car dealership" ad
    - Some are inaccessible if they are not on the bus loops.
    - Financial. "AmeriCorps – thank you for joining and here is your application for food stamps"
    - Some foods are inaccessible with this program
    - Alissa:
        - Farm to family program – WIC…NOFA "crop cash" program
        - Consumer facing – all direct market database.

Rutland County Focus Group

Date: October 7, 2017
Location: Rutland Regional Medical Center
Time: 10:00 AM - 11:30 AM (90 minutes)

Roles
Moderator: George Schildge
Assistant Moderator: Katie Lukes

<u>Vermont Locally-Grown Food Messaging Questions:</u>

A. Written Down - 15 seconds for each question
Directions: "Write 'A' in the upper right-hand corner of your card. For this first question, write number 1. Leave room to answer 4 questions. You may go onto the back of your card if you need to."

1. *What comes to mind when I say locally-grown food?*
    - Farms and gardens in the neighborhood
    - Farmers Market on Saturday where you can get "locally grown food." I also always think of corn-on-the-cob
    - Meats, cheeses, pastures, family traditions
    - A farm in my state (VT)
    - Clean, fresh garden picks from within a 20-mile radius

2. *What comes to mind when I say farm fresh food?*
    - Small personal farm, family run, no poisons
    - Quick farm to store and/or farm to table time
    - Local, no third-party hands involved, source of food being consumed is known
    - I have not really used or heard that term used to a great extent. Just picked
    - Foods that are right out of the local garden

3. *What comes to mind when I say organic food?*
    - Foods that have no chemicals in them
    - The way it's grown. No preservatives, chemicals, etc. Healthier. More expensive
    - Majority of foods...healthy or not

- Non-GMO; no pesticides
- Zero pesticides, herbicides, or chemicals in any fashion

4. *Are you more likely to buy something if it was grown in Vermont? Why or why not?*
    - Yes! That is where I live and I want to use my money to support my neighbors not big corporations
    - Yes, If price is competitive, supports local farmers + businesses + probably fresher
    - Yes! Why? Better idea where it comes from + ability to visit location if desired
    - Yes, depending on cost. VT, to me, signifies better quality, better method of growing. Trusted quality
    - Yes, depending on price. I love fresh foods.

<u>Shopping Patterns Questions:</u>

Open-Ended Question

1. *Where do you buy fresh produce?*
    - Where ever it is available; laughing child farm; it's hard to find sometimes
    - Farmers market if I catch it in time; Hannaford's, Price Chopper
    - Grocery store for specials….Shaw's, Price Chopper; If I am in Castleton on a day when the farmers market is there, I will stop. I do not like the parking at the Rutland Farmers Market; Co-op in Middlebury
    - In the grocery stores; farmers markets – I want to go to them; $30 worth of vouchers to spend at farmers markets and farm stands
    - All over; Saturday mornings…Farmers Markets, Co-op, Hannaford's, Price Chopper

2. *Where do you shop for locally-grown produce?*
    - Sometimes a barter system…private gardens
    - Garbowski's Farm Stand; when farmers have their stuff out

3. For what reasons you buy local food?
    - You know where it is from; if you want to you can drive buy that farm and see what the farm conditions are like; to support people who aren't making thousands of dollars a month
    - If its local it's going to taste better
    - Taste is so much better

- Taste, shelf life, taking a gamble on it at the grocery store
- I like to meet the people who grow my food; the interaction with real people

B. Written Down

Directions: "Write the letter 'B' in the upper right-hand corner of your card. I'll give you 30 seconds to describe what type of shopper you are. When we are done, place your card in the middle."

1. *What kind of shopper are you?*
    - I hate being in grocery stores. Get-in get-out. Will travel if employees are happier than/local - as needed
    - Price v. Quality are typically the 2 main "things" on my mind when I shop.
    - Browser with a list. I know what I need…find things I don't need, but use everything
    - I am definitely a Bargain, Best Bang for my Buck Shopper. I check flyers, clip coupons (and online ones too!) and look for specials.
    - I look for items on sale because my income is limited. I get what I need, not necessarily what I want.

<u>Direct Markets Convenience Questions:</u>

C. Written Down Question

Directions: "Write the letter 'C' in the upper right-hand corner of your card. I will give you about a minute."

1. *Make a list of all the direct markets (farmers markets, farm stands, CSAs) you can conceivably shop at. Please make this list vertically, top to bottom, because we will come back to this list.*
    - Response 1:
        - Ludlow Farmers Market - 4-5x's
        - Rutland Farmers Market - 30x's
        - Springfield Co-op - 2x's
    - Response 2:
        - Rutland Farmers Market - 3x's
        - Castleton Farmers Market - 1x
        - Poultney - 0
        - Garbowski's Farm Stand - 2x's
        - Millers Farm Stand - 1x

- Rt. 4 Hydenelle - 1x
- Wallingford (Shaws) - 2x's
- CSA - "Don't Know"

- Response 3:
  - Castleton Farmers Market - 2x's
  - Fair Haven Farmers Market - 2x's
  - Poultney Farmers Market - 1x
  - Rutland Farmers Market - 2x's
  - Brown's Farm Stand - 0
  - CSA – None
- Response 4:
  - Rutland Farmers Market - 0
  - Route 7 Brandon, Garden Center CSA (can't remember)
  - Garbowski's Farm Stand - 0
  - Poultney Farmers Market - 0
  - Castleton Farmers Market - 0
  - West Rutland Farmers Market - 0
  - Hydro Tomato West Rutland - 0
- Response 5:
  - Rutland Farmers Market - 10+ times
  - Brandon Farmers Market - 3x's
  - Burlington Farmers Market - 3x's
  - Bennington Farmers Market - 6x's
  - Farm Stand (Names Unknown) - 15+
  - CSA – None

The frequency of shopping at direct markets for focus group location:

RUTLAND COUNTY	How Many Total	Avg. Listed	Avg. Listed % of total	Avg. # Shopped At (in last 12 months)	Avg. Shopped at % of total
Farmers Markets	6	3.4	57%	2.6	43.3%
Farm Stands	59*	1.6	2.7%	1	1.7%
CSAs	9	0.2	2.2%	0	0%
TOTAL	74	5.2	7%	3.6	4.9%

*Taken from RAFFL's 12th Annual Locally Grown Guide, which includes Bennington County as well. On-site farm sales. http://www.rutlandfarmandfood.org/guide/

<u>Direct Markets Awareness Questions:</u>

D. Written Down

Directions: "Please write the letter 'D' in the upper right-hand corner. Leave space to answer three questions. If you need space you my go onto the back of your card."

1. *Please describe what you like most and like least about a farmers market.*
    - Most: Quality. Least: Price
    - Most: Variety, Love sampling. Least: Crowds + accompanying parking
    - Most: I like the variety of fresh foods offered. I don't like most prices...kind of high.
    - Most: Fresh choices. Least: Availability
    - Most: Meeting owners of the products. Least: Some items have increased price

2. *Please describe what you like most and like least about a farm stand.*
    - Most: Laid back, come and go as please. Least: Don't know how long produce sat there
    - Most: Limited options, faces people. Least: Availability
    - I don't like the high prices
    - Most: Taste. Least: Hours of availability too variable, changing
    - Most: Quality. Least: Accessibility (An app to locate farmers markets/stand would be nice)

3. *Please describe what you think a CSA is, and what you like most and least about a CSA.*
    - I think a CSA is a co-op type of environment. Most: Variety. Least: Cost
    - I have never heard of them before, but I picture an area of land where individuals each get a section/plot to grow their own food. Most: Empower people to grow own food. Least: Travel to them.
    - I don't know anything about CSA's.
    - Farmers/growers selling in bulk to lessen cost and increase availability. Least: Finding them when I have $
    - Most: Community driven, group effort. Least: If a member, less ability to really pick specific produce

<u>Product Attribute Questions:</u>

E. Written Down - Tomato question

Directions: "In the upper right-hand corner, please write the letter 'E.'

1. *All things equal, if you had to choose between a tomato sold at a farm stand and a tomato sold at a grocery store, what would you choose? Why?*
    - Farm Stand - Taste is so much better
    - I would pick the farm stand tomato because it's most likely fresher than what I'd get at the grocery store (assuming all related deciding factors are equal).
    - Farm Stand - for flavor.
    - Farm stand - goes to support a person
    - Farm stand - Locally supporting farmer + less third-party handling

Open Ended Question

1. *If you have shopped for food at a farmers market, did you find what you were looking for?*
    - Not always; Could not find any apples at all; a good variety though of other things
    - I do not go intending to find anything, I just go to see what they have
    - I see what they have, if it looks good and I like it, the price is right, I'll buy it
    - The Farmers Market is like the fair…I didn't know I needed that…
    - I go just to go; I know I'm going to spend $40 either way; 2 hours later, I'm leaving with something else I didn't know I needed

2. *How confident are you that you can find all your produce at a farmers market?*
    - Absolutely zero – our farmers markets are very small
    - I usually find what I am looking for

F. Written Down Question

Directions: "In the upper right-hand corner, please write the letter 'F.'

1. *Please write down, in order of importance, 1-3 variables you look at when deciding to buy produce.*
    - Response 1:
        - Price
        - Freshness
        - Quality
    - Response 2:
        - Appearance

- Smell (if any)
- Price

- Response 3:
  - Is it ripe?
  - Is It old? What does it look like?
  - Price
- Response 4:
  - Not poisoned
  - Not rotten
  - Fresh
- Response 5:
  - Visually appealing/quality
  - Price
  - Customer service

2. *Please write down, in order of importance, 1-3 variables you look at when deciding to buy meat.*
   - Response 1:
     - Vegetarian, but value grassfed and free range
   - Response 2:
     - Not abused
     - Price
     - Cuts
   - Response 3:
     - What does it look like?
     - Price
     - How much fat?
   - Response 4:
     - Appearance
     - Smell
     - Price
   - Response 5:
     - Freshness
     - Quality
     - Price

<u>Price Questions:</u>

G. Written Down - Cucumber question

Directions: "In the upper right-hand corner, please write the letter 'G.'

1. *Imagine yourself at the grocery store. You find a $1 regular, conventional cucumber." How much would you pay for an organic cucumber?*
    - $1.79 - $2
    - I'd pay more for sure, up to double
    - $1.25
    - 10-20% more
    - Same price or lower

2. How much would you pay for a locally-grown cucumber?
    - $1
    - Up to double
    - $1.25
    - 10-20% more
    - Same price or lower

3. *How much would you pay for locally-grown organic cucumber?*
    - $2-$2.50
    - Up to triple if their kids are working the stand
    - $1.25
    - 10-20% more
    - Same price or lower

4. *Now imagine yourself at a farmers market. Do you think a cucumber at the farmers market is more, less, or the same price as this $1 cucumber?*
    - Same or more
    - More
    - More
    - Way more than $1
    - Same price

5. *At a farm stand…Do you think the cucumber at a farm stand is more, less, or the same price as this $1 cucumber?*
    - More
    - More
    - More
    - Depends on the location - more in Woodstock, less in Grand Isle
    - Less price

6. *In a CSA basket…Do you think the cucumber in a CSA basket is more, less, or the same price as this $1 cucumber?*
    - More
    - More
    - More
    - Less
    - More

<u>Values and Beliefs Questions:</u>

H. Written Down
Directions: "In the upper right-hand corner, please write the letter 'H.'

1. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the produce you buy in grocery stores is good for your health?*
    - 10
    - 4
    - 4
    - 3
    - 2

2. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the meat you buy in grocery stores is good for your health?*
    - 6
    - 3
    - 4
    - 1
    - 3

3. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the produce you buy at farmers markets, farm stands, and CSAs is good for your health?*
    - 10
    - 7
    - 7
    - 8
    - 5 - Depends if I know them

4. *On a scale of 1-10, 1 low and 10 being high, how much do you trust that the meat you buy at farmers markets, farm stands, and CSAs is good for your health?*
    - 6
    - 7
    - 7
    - 7
    - 5

5. *On a scale of 1-10, 1 low and 10 being high, how important is your relationship with the farmers who grow your food?*
    - 5
    - 5
    - 5
    - 7
    - 10

6. *On a scale of 1-10, 1 being low and 10 being high, when produce is in season, how important is it for you only buy it local?*
    - 7
    - 5
    - 6
    - 9
    - 10

<u>Lifestyle Questions:</u>

Open-Ended Question

1. *How often, or for what reasons, do you buy things you do not know how to cook?*
    - 2-3x's a month; usually a recipe sparks that idea
    - 1-2x's a month; recipe, or when my daughter comes home and wants to try something new
    - Hardly ever
    - Once a week
    - Creative in the kitchen; like to learn what you can eat in my yard; my husband and I have fun with our food

Think Back Question

1. *Think back to a time when you decided to change your eating habits. What motivated you to make this change? How did your shopping habits change?*
    - I have always been someone who wants to eat healthy to lose weight; doctor had her do a diet just before surgery – lost 15 lbs before surgery because I followed the instructions he gave me to buy
    - A few months after his son was born – I was eating bad and started feeling sluggish; prompted him to buy more produce
    - "Fat to fit by 50" mom died of breast cancer; first husband died of a heart attack – both before 50
    - Became a vegetarian in 6th grade because she went to a rodeo and has since been educated on where food comes from; very aware of what is in food – all happened within 20 years
    - Diabetes – it took a while for her to know what is good and what is not good for her; she has gone through the diet based on her blood type. It does limit what you can eat; now getting out of it, realizing what changing her food habits does

CSA Open-Ended Question

1. *If you have a CSA, or have had a CSA in the past, how is/was your shopping different? You're eating? What are some barriers keeping you from subscribing to a CSA?*
    - More restricted on what you can get – you can pick things that you definitely don't want; pricey to not be certain about what you want
    - Need to have a place/knowledge

Farmers Market Open-Ended Question

1. *What are some barriers keeping you from doing some or all of your grocery shopping at farmers markets?*
    - Money.
    - Money
    - Money and availability
    - Price and accessibility
    - Price, getting there, bad parking – that parking lot is atrocious
    - Why isn't there a bus to get there?

Farm Stand Open-Ended Question

1. *What are some barriers keeping you from doing some or all of your grocery shopping at farm stands?*
    - The one that I know of I've heard of it's too expensive

- If I go by one and I want to stop and see something, I'll get it; Chance. I don't go purposely
- They never take a debit card; I want to support it but I don't have the cash in my pocket
- Price and accessibility; if there was an app I could plan it out better
- Loves the app idea; If I knew one was on the way
- Locally grown guide – lists farm stands, farmers markets; entryways of grocery stores; she was the woman who was given the $30 to spend at farmers markets. Because she had the money to spend at these stores, she sought out the information to match her shopping style and capabilities

All Things Considered Question:

1. *Suppose you wanted to invite a friend with you to a farmers market. What would you say?*
    - "Let's go buy some fresh produce"
    - "I'm going to check out if there are any bargains at the farmers market. Would you like to come along?"
    - Would you like to come along and browse with me?
    - Usually whoever I invite wants to go…my family gets a kick out of the meat in coolers
    - Depends on what day of the week it is because it isn't always consistent

2. *Given what we've discussed today, what would make you more likely to purchase more of your food from direct markets?*
    - More information, availability, where it is located, what is served so I can plan out a week or something
    - More money
    - Price and knowledge of where they are
    - Price and availability; if that booklet was an app that would be great…but hasn't looked
    - Knowing where to go; learned what a CSA handwritten sign at a garden center; need to find the people who know the people to learn more

Final Question:

The moderator reviews the purpose of the study.

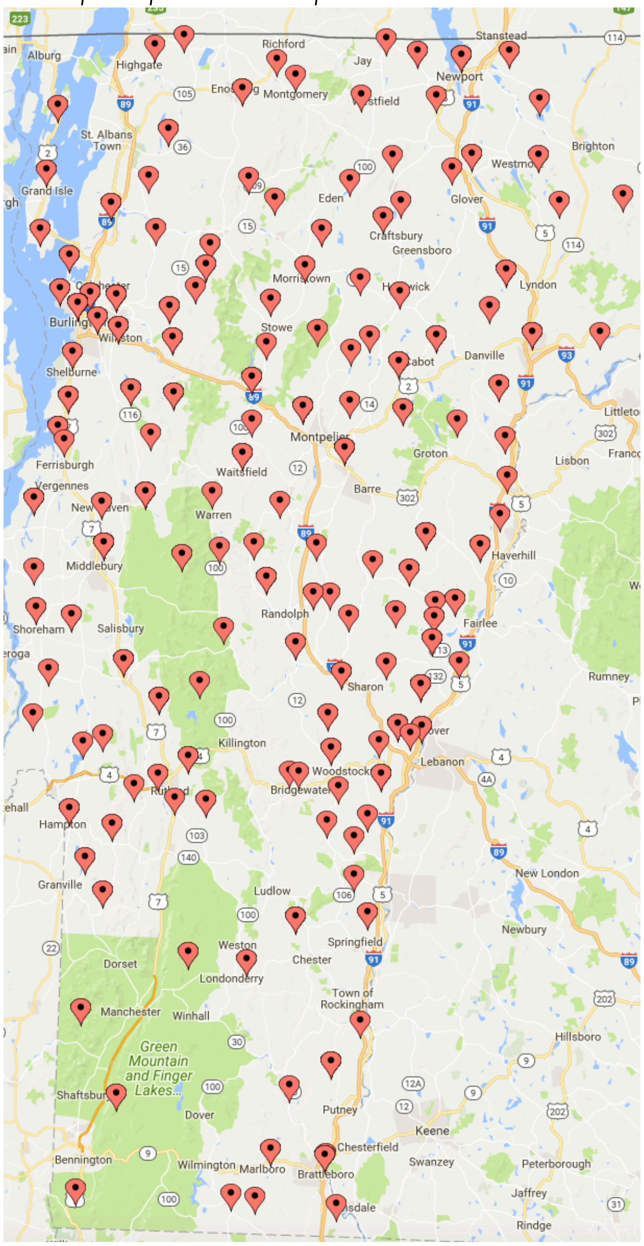
1. *Have we missed anything?*
   - There is a website for this local food guide rutlandfarmandfood.org
   - Red Solo Cup tours – why not a local farm tour like microbrewery

- "Breakfast on the farm" free events to get folks to the farm
- Just because someone is a local farmer does not mean they use pesticides and abuse their animals

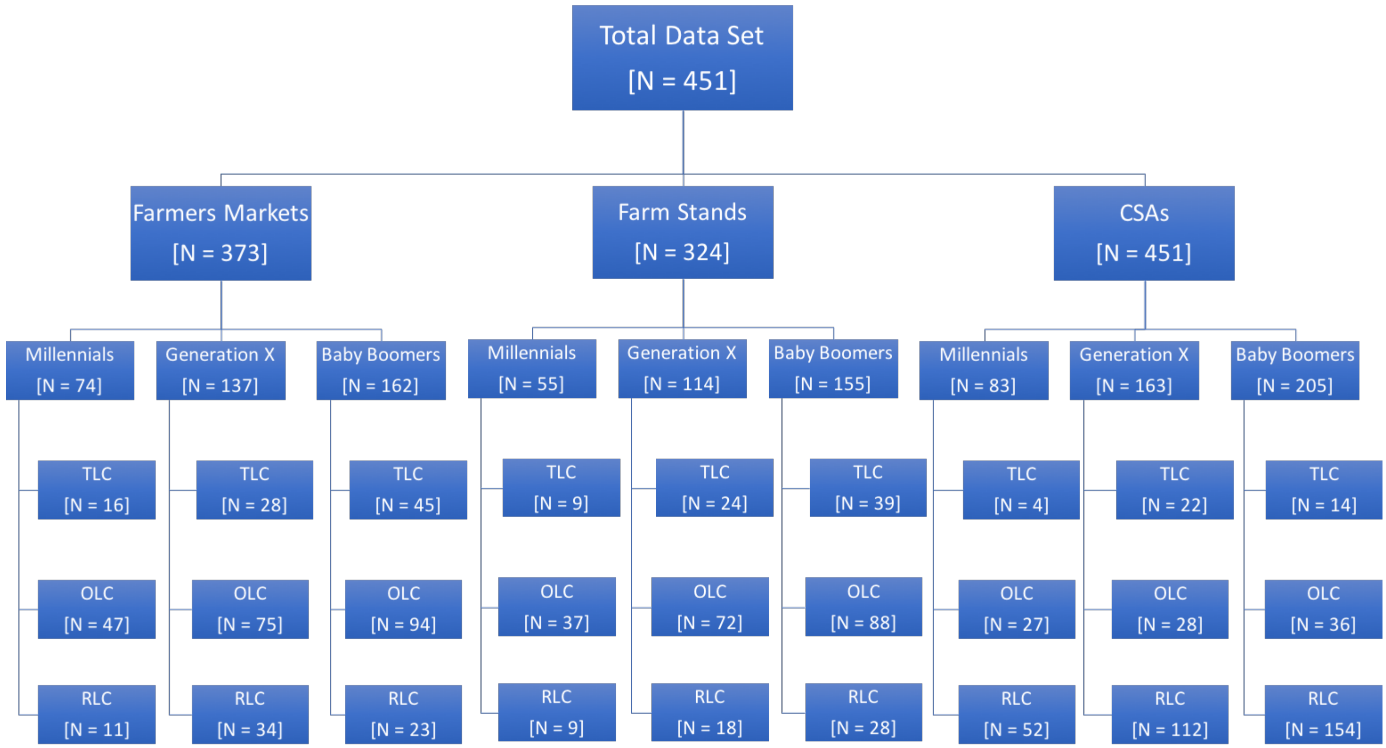
In-State Survey Data

In-State Survey Respondent Distribution

**Each pin represents a respondent's location based on the zip code they provided.*



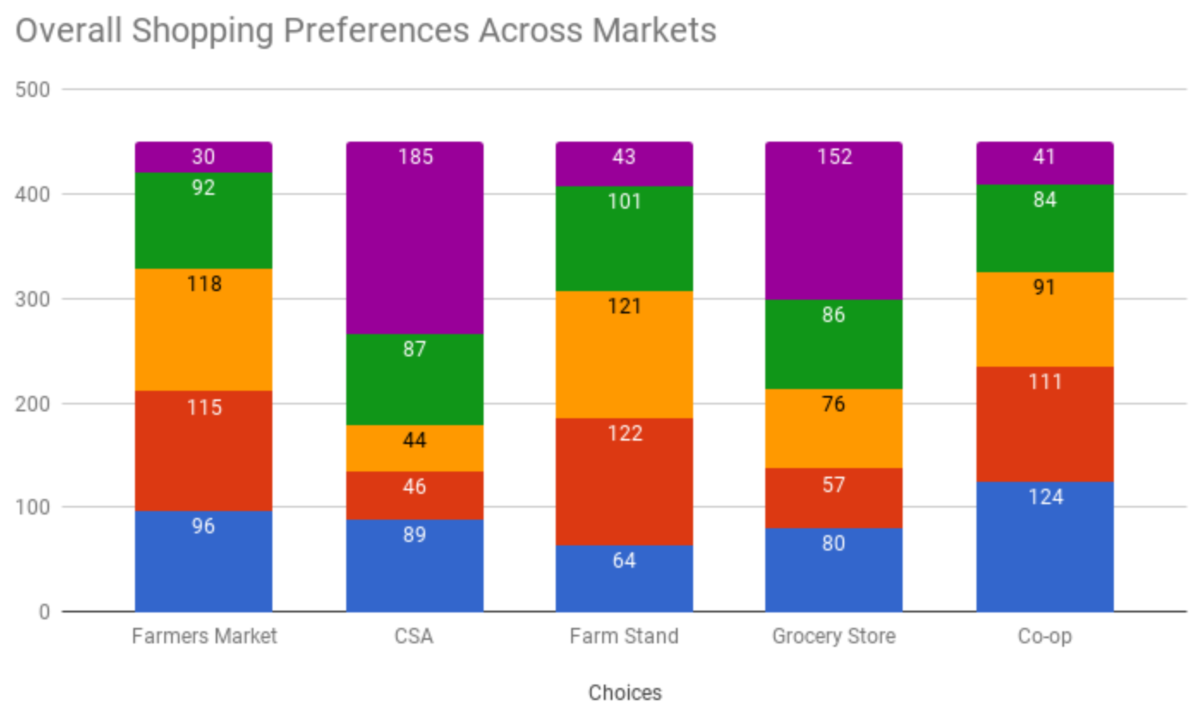
In-State Survey Segmentation Methodology Breakdown



In-State Survey Shopping Channel Preferences

Overall Shopping Channel Preferences

Overall Shopping Channel Preferences (N=451) (non-segmented)



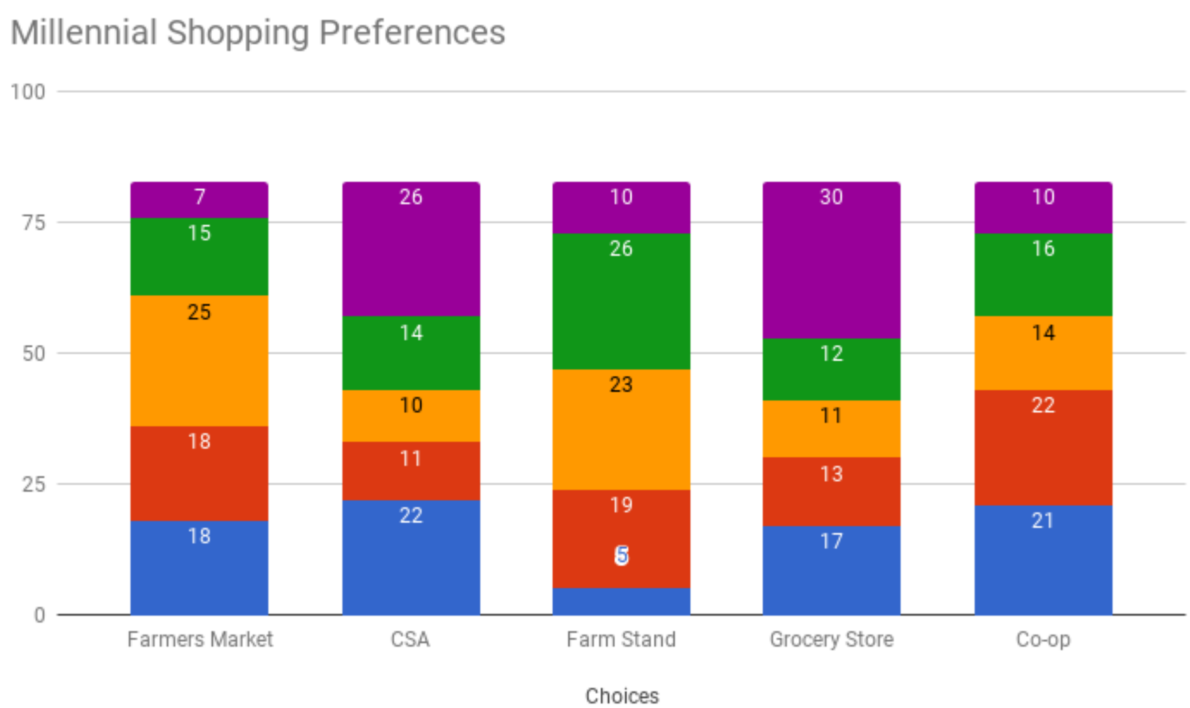
Key	
Blue	#1 Most Preferred
Red	#2 Most Preferred
Orange	#3 Most Preferred
Green	#4 Most Preferred
Purple	#5 Most Preferred

*Number in chart indicates number of respondents – not percentages.

Choices	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred
Farmers Market	21.3% (96)	25.5% (115)	26.2% (118)	20.4% (92)	6.6% (30)
CSA	19.7% (89)	10.2% (46)	9.8% (44)	19.3% (87)	41% (185)
Farm Stand	14.2% (64)	27.1% (122)	26.8% (121)	22.4% (101)	9.5% (43)
Grocery Store	17.7% (80)	12.6% (57)	16.9% (76)	19.1% (86)	33.7% (152)
Co-op	27.5% (124)	24.6% (111)	20.2% (91)	18.6% (84)	9.1% (41)

Shopping Channel Preference Segmented by Age

Millennial Shopping Channel Preferences (N=83)

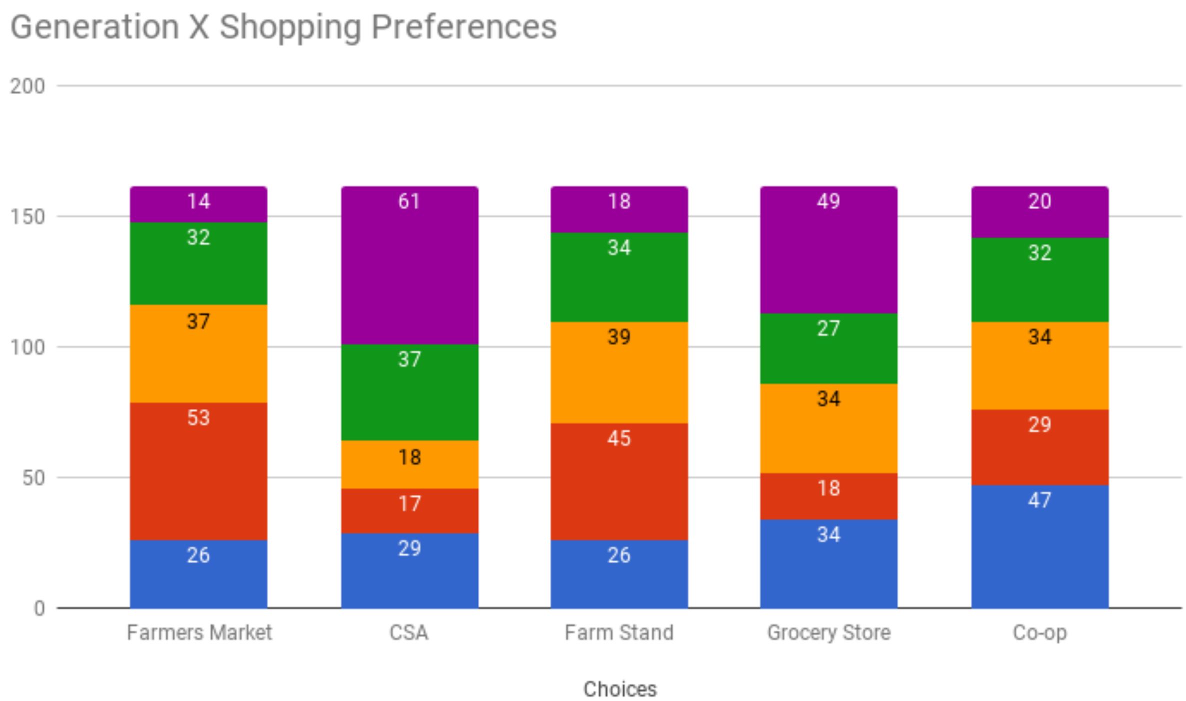


Key	
Blue	#1 Most Preferred
Red	#2 Most Preferred
Orange	#3 Most Preferred
Green	#4 Most Preferred
Purple	#5 Most Preferred

*Number in chart indicates number of respondents – not percentages.

Choices	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred
Farmers Market	21.7% (18)	21.7% (18)	30.1% (25)	18.1% (15)	8.4% (7)
CSA	26.5% (22)	13.3% (11)	12.1% (10)	16.9% (14)	31.3% (26)
Farm Stand	6% (5)	22.9% (19)	27.7% (23)	31.3% (26)	12.1% (10)
Grocery Store	20.5% (17)	15.7% (13)	13.3% (11)	14.5% (12)	36.1% (30)
Co-op	25.3% (21)	26.5% (22)	16.9% (14)	19.3% (16)	12.1% (10)

Gen X Shopping Channel Preferences (N=162)

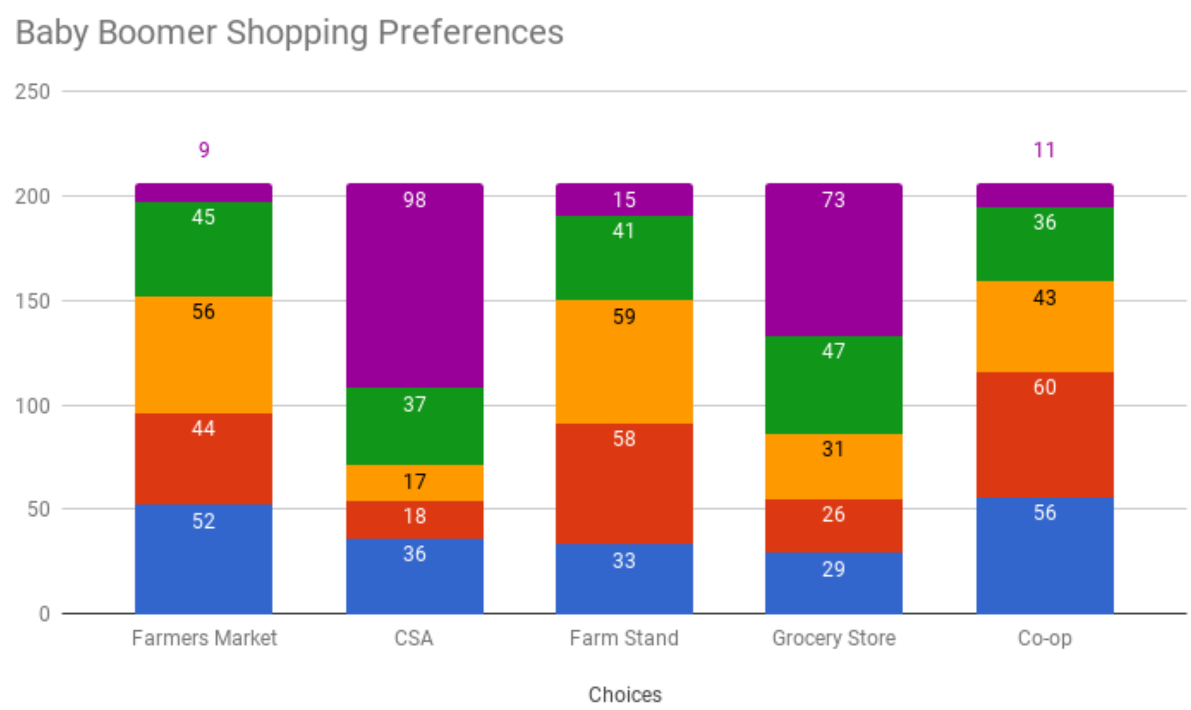


Key	
Blue	#1 Most Preferred
Red	#2 Most Preferred
Orange	#3 Most Preferred
Green	#4 Most Preferred
Purple	#5 Most Preferred

*Number in chart indicates number of respondents – not percentages.

Choices	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred
Farmers Market	16.1% (26)	32.7% (53)	22.8% (37)	19.8% (32)	8.6% (14)
CSA	17.9% (29)	10.5% (17)	11.1% (18)	22.8% (37)	37.7% (61)
Farm Stand	16.1% (26)	27.8% (45)	24.1% (39)	21% (34)	11.1% (18)
Grocery Store	21% (34)	11.1% (18)	21% (34)	16.7% (27)	30.3% (49)
Co-op	29% (47)	17.9% (29)	21% (34)	19.8% (32)	12.4% (20)

Baby Boomer Shopping Channel Preferences (N=206)



Key	
Blue	#1 Most Preferred
Red	#2 Most Preferred
Orange	#3 Most Preferred
Green	#4 Most Preferred
Purple	#5 Most Preferred

*Number in chart indicates number of respondents – not percentages.

Choices	#1 Most Preferred	#2 Most Preferred	#3 Most Preferred	#4 Most Preferred	#5 Most Preferred
Farmers Market	25.2% (52)	21.4% (44)	27.2% (56)	21.8% (45)	4.4% (9)
CSA	17.5% (36)	8.7% (18)	8.3% (17)	18% (37)	47.6% (98)
Farm Stand	16% (33)	28.2% (58)	28.6% (59)	19.9% (41)	7.3% (15)
Grocery Store	14.1% (29)	12.6% (26)	15.1% (31)	22.8% (47)	35.4% (73)
Co-op	27.2% (56)	29.1% (60)	20.9% (43)	17.5% (36)	5.3% (11)

In-State Survey Considerations

"When Buying Local Produce I Consider:" – Farmers Market

By Farmers Market Frequency	Total sample (N = 451)	TLC (N = 92)	OLC (N = 220)	RLC (N = 139)
High Quality				
Strongly Agree	82.26%	88.04%	81.82%	79.14%
Agree	16.41%	11.96%	16.82%	18.71%
Neutral	1.33%	0.00%	1.36%	2.16%
Disagree	0.00%	0.00%	0.00%	0.00%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Price				
Strongly Agree	31.93%	20.67%	31.82%	39.57%
Agree	40.13%	48.91%	39.55%	35.25%
Neutral	22.62%	22.83%	23.64%	20.86%
Disagree	3.33%	3.26%	3.18%	3.60%
Strongly Disagree	2.00%	4.35%	1.82%	0.72%
Supporting Local Farmers				
Strongly Agree	67.18%	79.35%	67.27%	58.99%
Agree	27.05%	19.57%	28.64%	29.50%
Neutral	4.66%	1.09%	3.18%	9.35%
Disagree	0.67%	0.00%	0.00%	2.16%
Strongly Disagree	0.44%	0.00%	0.91%	0.00%
Organic Label				
Strongly Agree	35.03%	32.61%	35.00%	36.39%
Agree	33.92%	34.78%	35.45%	30.94%
Neutral	23.73%	28.26%	24.09%	20.14%
Disagree	4.66%	3.26%	5.00%	5.04%
Strongly Disagree	2.66%	1.09%	0.45%	7.19%
Freshness				
Strongly Agree	80.27%	89.13%	78.64%	76.98%
Agree	18.18%	10.87%	19.55%	20.86%
Neutral	1.55%	0.00%	1.82%	2.16%
Disagree	0.00%	0.00%	0.00%	0.00%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Environmental Impact				
Strongly Agree	52.33%	50.00%	56.82%	46.76%
Agree	34.37%	42.39%	31.82%	33.09%
Neutral	11.53%	6.52%	10.00%	17.27%
Disagree	1.55%	1.09%	0.91%	2.88%
Strongly Disagree	0.22%	0.00%	0.45%	0.00%

Nutritional Value				
Strongly Agree	57.87%	63.04%	55.91%	57.55%
Agree	31.04%	29.35%	34.55%	26.62%
Neutral	10.64%	6.52%	9.55%	15.11%
Disagree	0.44%	1.09%	0.00%	0.72%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Cleanliness				
Strongly Agree	31.93%	32.61%	33.64%	28.78%
Agree	37.92%	43.48%	33.18%	41.73%
Neutral	25.72%	21.74%	29.09%	23.02%
Disagree	3.99%	1.09%	4.09%	5.76%
Strongly Disagree	0.44%	1.09%	0.00%	0.72%
Farming Practices				
Strongly Agree	57.65%	60.87%	57.73%	55.40%
Agree	31.26%	32.61%	30.91%	30.94%
Neutral	9.31%	6.52%	10.00%	10.07%
Disagree	1.55%	0.00%	1.36%	2.88%
Strongly Disagree	0.22%	0.00%	0.00%	0.72%

"When Buying Local Produce I Consider:" – Farm Stand

By Farm Stand Frequency	Total sample (N = 451)	TLC (n = 76)	OLC (n = 211)	RLC (n = 164)
High Quality				
Strongly Agree	82.26%	88.16%	84.83%	76.22%
Agree	16.41%	11.84%	14.22%	21.34%
Neutral	1.33%	0.00%	0.95%	2.44 %
Disagree	0.00%	0.00%	0.00%	0.00%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Price				
Strongly Agree	31.93%	21.05%	31.75%	37.20%
Agree	40.13%	36.84%	42.18%	39.02%
Neutral	22.62%	36.84%	20.85%	18.29%
Disagree	3.33%	3.95%	2.84%	3.66%
Strongly Disagree	2.00%	1.32%	2.37%	1.83%
Supporting Local Farmers				
Strongly Agree	67.18%	84.21%	69.19%	56.71%
Agree	27.05%	14.47%	26.54%	33.54%
Neutral	4.66%	1.32%	3.32%	7.93%
Disagree	0.67%	0.00%	0.47%	1.22%
Strongly Disagree		0.00%	0.47%	0.61%

	0.44%			
Organic Label				
Strongly Agree	35.03%	44.74%	31.75%	34.76%
Agree	33.92%	32.89%	38.39%	28.66%
Neutral	23.73%	19.74%	23.70%	25.61%
Disagree	4.66%	2.63%	4.74%	5.49%
Strongly Disagree	2.66%	0.00%	1.42%	5.49%
Freshness				
Strongly Agree	80.27%	88.16%	81.99%	74.39%
Agree	18.18%	11.84%	17.06%	22.56%
Neutral	1.55%	0.00%	0.95%	3.05%
Disagree	0.00%	0.00%	0.00%	0.00%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Environmental Impact				
Strongly Agree	52.33%	53.95%	53.55%	50.00%
Agree	34.37%	35.53%	34.12%	34.15%
Neutral	11.53%	9.21%	10.90%	13.41%
Disagree	1.55%	1.32%	0.95%	2.44%
Strongly Disagree	0.22%	0.00%	0.47%	0.00%
Nutritional Value				
Strongly Agree	57.87%	65.79%	57.35%	54.88%
Agree	31.04%	27.63%	30.81%	32.93%
Neutral	10.64%	5.26%	11.37%	12.20%
Disagree	0.44%	1.32%	0.47%	0.00%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Cleanliness				
Strongly Agree	31.93%	42.11%	29.38%	30.49%
Agree	37.92%	36.84%	39.34%	36.59%
Neutral	25.72%	17.11%	26.54%	28.66%
Disagree	3.99%	3.95%	4.27%	3.66%
Strongly Disagree	0.44%	0.00%	0.47%	0.61%
Farming Practices				
Strongly Agree	57.65%	61.84%	60.19%	52.44%
Agree	31.26%	31.58%	30.81%	31.71%
Neutral	9.31%	6.58%	7.11%	13.41%
Disagree	1.55%	0.00%	1.42%	2.44%
Strongly Disagree	0.22%	0.00%	0.47%	0.00%

“When Buying Local Produce I Consider:” - CSA

By CSA Frequency	Total Sample (N = 451)	TLC (n = 33)	OLC (n = 103)	RLC (n = 315)
High Quality				
Strongly Agree	82.26%	90.91%	84.47%	80.63%
Agree	16.41%	9.09%	14.56%	17.78%
Neutral	1.33%	0.00%	0.97%	1.59%
Disagree	0.00%	0.00%	0.00%	0.00%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Price				
Strongly Agree	31.93%	24.42%	30.10%	33.33%
Agree	40.13%	42.42%	44.66%	38.41%
Neutral	22.62%	21.21%	20.39%	23.49%
Disagree	3.33%	6.06%	3.88%	2.86%
Strongly Disagree	2.00%	6.06%	0.97%	1.90%
Supporting Local Farmers				
Strongly Agree	67.18%	72.73%	69.90%	65.71%
Agree	27.05%	27.27%	26.21%	27.30%
Neutral	4.66%	0.00%	3.88%	5.40%
Disagree	0.67%	0.00%	0.00%	0.95%
Strongly Disagree	0.44%	0.00%	0.00%	0.63%
Organic Label				
Strongly Agree	35.03%	51.52%	36.89%	32.70%
Agree	33.92%	30.30%	33.01%	34.60%
Neutral	23.73%	18.18%	23.30%	24.44%
Disagree	4.66%	0.00%	3.88%	5.40%
Strongly Disagree	2.66%	0.00%	2.91%	2.86%
Freshness				
Strongly Agree	80.27%	75.76%	83.50%	79.68%
Agree	18.18%	24.24%	16.50%	18.10%
Neutral	1.55%	0.00%	0.00%	2.22%
Disagree	0.00%	0.00%	0.00%	0.00%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Environmental Impact				
Strongly Agree	52.33%	75.76%	50.49%	50.48%
Agree	34.37%	24.24%	37.86%	34.29%
Neutral	11.53%	0.00%	10.68%	13.02%
Disagree	1.55%	0.00%	0.97%	1.90%
Strongly Disagree	0.22%	0.00%	0.00%	0.32%
Nutritional Value				

Strongly Agree	57.87%	60.61%	59.22%	57.14%
Agree	31.04%	27.27%	33.01%	30.79%
Neutral	10.64%	12.12%	6.80%	11.75%
Disagree	0.44%	0.00%	0.97%	0.32%
Strongly Disagree	0.00%	0.00%	0.00%	0.00%
Cleanliness				
Strongly Agree	31.93%	30.30%	29.13%	33.02%
Agree	37.92%	27.27%	37.86%	39.05%
Neutral	25.72%	39.39%	27.18%	23.81%
Disagree	3.99%	3.03%	5.83%	3.49%
Strongly Disagree	0.44%	0.00%	0.00%	0.63%
Farming Practices				
Strongly Agree	57.65%	72.73%	61.17%	54.92%
Agree	31.26%	21.21%	33.01%	31.75%
Neutral	9.31%	6.06%	5.83%	10.79%
Disagree	1.55%	0.00%	0.00%	2.22%
Strongly Disagree	0.22%	0.00%	0.00%	0.32%

In-State Survey Barriers

Direct Market Inhibitors, "What Prevents You From Shopping?" – Farmers Market

By Farmers Market Frequency	Total sample (N = 451)	TLC (N = 92)	OLC (N = 220)	RLC (N = 139)
Too Far Away	19.29%	7.61%	16.82%	30.94%
Inconvenient Hours	37.92%	19.57%	40.45%	46.04%
Lack of Choice	6.65%	1.09%	6.82%	10.07%
Too Expensive	28.82%	13.04%	28.64%	39.57%
Poor Selection of Food Products	7.54%	3.26%	5.91%	12.95%
Poor Selection of Non-Food Products	6.21%	6.52%	7.27%	4.32%

Poor Quality of Food Products	1.77%	1.09%	0.45%	4.32%
The Shopping Environment Isn't Comfortable	10.42%	2.17%	7.73%	20.14%
Parking Is a Hassle	17.52%	8.70%	15.45%	26.62%
I'm Not Comfortable With How They Work	2.00%	0.00%	1.36%	4.32%
I Prefer Grocery Stores	7.76%	1.09%	3.64%	18.71%
I Don't Know Where The Closest One Is	1.55%	0.00%	0.91%	3.60%
I Grow My Own Food	37.92%	35.87%	37.27%	40.29%

Direct Market Inhibitors, "What Prevents You From Shopping?" – Farm Stand

By Farm Stand Frequency	Total sample (N = 451)	TLC (n = 76)	OLC (n = 211)	RLC (n = 164)
Too Far Away	21.06%	6.58%	19.43%	29.88%
Inconvenient Hours	13.30%	11.84%	12.32%	15.24%
Lack of Choice	11.09%	7.89%	9.00%	15.24%
Too Expensive	16.41%	14.47%	11.85%	23.17%
Poor Selection of Food Products	7.76%	7.89%	4.74%	11.59%
Poor Selection of	7.32%	11.84%	6.16%	6.71%

Non-Food Products				
Poor Quality of Food Products	3.10%	1.32%	1.90%	5.49%
The Shopping Environment Isn't Comfortable	2.44%	0.00%	0.95%	5.49%
Parking Is a Hassle	3.77%	2.63%	2.37%	6.10%
I'm Not Comfortable With How They Work	2.00%	0.00%	1.42%	3.66%
I Prefer Grocery Stores	7.54%	1.32%	5.69%	12.80%
I Don't Know Where The Closest One Is	11.09%	1.32%	6.64%	21.34%
I Grow My Own Food	34.37%	34.21%	34.12%	34.76%

Direct Market Inhibitors, "What Prevents You From Shopping?" - CSA

By CSA Frequency	Total Sample (N = 451)	TLC (n = 33)	OLC (n = 103)	RLC (n = 315)
Too Far Away	7.32%	0.00%	5.83%	8.57%
Inconvenient Hours	10.86%	6.06%	13.59%	10.48%
Lack of Choice	15.96%	0.00%	11.65%	19.05%
Too Expensive	21.51%	3.03%	18.45%	24.44%
Poor Selection of Food Products	7.10%	0.00%	3.88%	8.89%

Poor Selection of Non-Food Products	6.87%	6.06%	6.80%	6.98%
Poor Quality of Food Products	0.89%	0.00%	0.97%	0.95%
The Shopping Environment Isn't Comfortable	2.66%	0.00%	0.97%	3.49%
Parking Is a Hassle	1.33%	3.03%	0.00%	1.59%
I'm Not Comfortable With How They Work	8.65%	0.00%	4.85%	10.79%
I Prefer Grocery Stores	8.43%	0.00%	1.94%	11.43%
I Don't Know Where The Closest One Is	5.76%	0.00%	0.00%	8.25%
I Grow My Own Food	37.47%	6.06%	30.10%	43.17%

In-State Survey Communication Usage

Farmers Market Shoppers' Regularly-Used Communication Channels

Communication Platforms	Millennials (N=74)	Generation X (N=137)	Baby Boomers (N=162)
Google Search	**79.7% (59)**	**71.5% (98)**	56.8% (92)
Facebook	**78.4% (58)**	**67.2% (92)**	51.9% (84)
Front Porch Forum	56.8% (42)	51.2% (70)	**64.8% (105)**
VPR	55.4% (41)	54% (74)	**65.4% (106)**
Email Lists	60.8% (45)	**56.2% (77)**	45.7% (74)
Local Newspapers	28.4% (21)	38.7% (53)	**58.6% (95)**
Seven Days	47.3% (35)	38.7% (53)	40.7% (66)

Instagram	**71.6% (53)**	23.4% (32)	10.5% (17)
Online Directories	24.3% (18)	19.7% (27)	24.1% (39)
Food & Community Blogs	21.6% (16)	22.6% (31)	18.5% (30)
Yelp/TripAdvisor	16.2% (12)	13.1% (18)	9.9% (16)
Twitter	21.6% (16)	11% (15)	6.2% (10)
QR Codes	1.4% (1)	0% (0)	1.2% (2)
Word of mouth	0% (0)	0% (0)	0.6% (1)

Farm Stand Shoppers' Regularly-Used Communication Channels

Communication Platforms	Millennials (N=55)	Generation X (N=114)	Baby Boomers (N=155)
Google Search	**83.6% (46)**	**50.3% (78)**	**57.4% (89)**
Facebook	**78.2% (43)**	**45.2% (70)**	53.6% (83)
Front Porch Forum	60% (33)	40.7% (63)	**61.2% (96)**
VPR	61.8% (34)	**46.5% (72)**	**59.4% (92)**
Email Lists	70.9% (39)	38.7% (60)	49.7% (77)
Local Newspapers	27.3% (15)	29% (45)	53.6% (83)
Seven Days	41.8% (23)	29.7% (46)	42.6% (66)
Instagram	**72.7% (40)**	15.5% (24)	7.7% (12)
Online Directories	29.1% (16)	15.5% (24)	25.2% (39)
Food & Community Blogs	23.6% (13)	16.8% (26)	17.4% (27)
Yelp/TripAdvisor	16.4% (9)	8.4% (13)	10.3% (16)
Twitter	20% (11)	8.4% (13)	4.5% (7)
QR Codes	1.8% (1)	0% (0)	1.3% (2)
Word of mouth	0% (0)	0% (0)	1.3% (2)

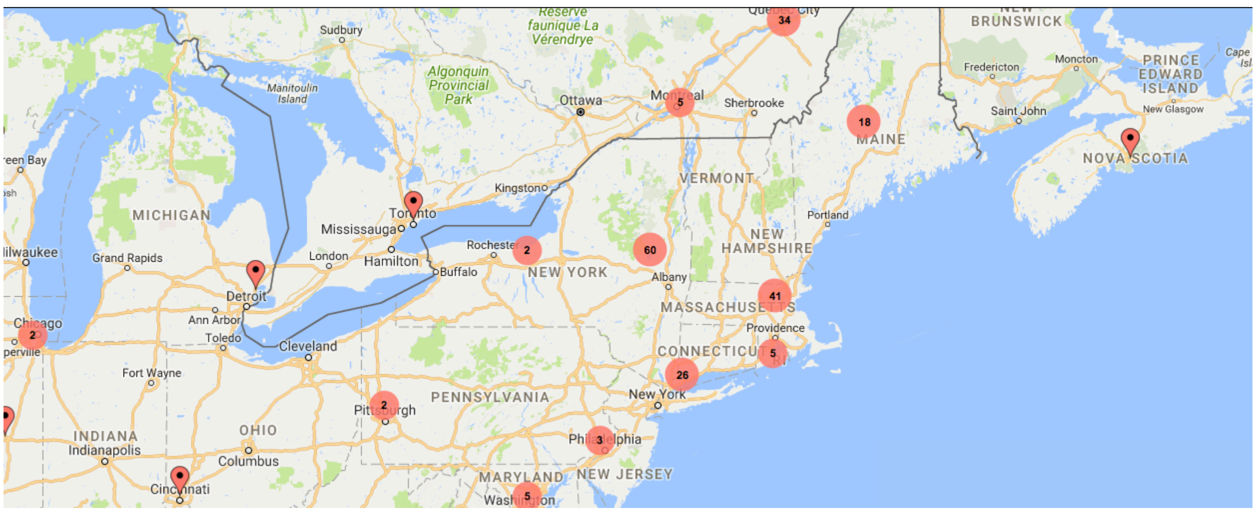
CSA Shoppers' Regularly-Used Communication Channels

Communication Platforms	Millennials (N=83)	Generation X (N=162)	Baby Boomers (N=155)
Google Search	**80.7% (67)**	**72.2% (117)**	**56.3% (116)**
Facebook	**75.9% (63)**	**65.4% (106)**	50.5% (104)
Front Porch Forum	56.6% (47)	51.9% (84)	**61.7% (127)**
VPR	56.6% (47)	**54.9% (89)**	**60.2% (124)**
Email Lists	60.2% (50)	52.5% (85)	44.7% (92)
Local Newspapers	27.7% (23)	37% (60)	53.4% (110)
Seven Days	48.2% (40)	37.7% (61)	38.4% (79)
Instagram	**69.9% (58)**	22.8% (37)	9.7% (20)

Online Directories	25.3% (21)	20.4% (33)	23.3% (48)
Food & Community Blogs	21.7% (18)	20.4% (33)	15.1% (31)
Yelp/TripAdvisor	14.5% (12)	14.2% (23)	9.7% (20)
Twitter	20.5% (17)	11.1% (18)	5.3% (11)
QR Codes	1.2% (1)	0% (0)	1% (2)
Word of mouth	0% (0)	0% (0)	0.5% (1)

Out-of-State Survey Data

Out-of-State Survey Respondent Distribution



*The numbers within each circle represent the number of respondents located in the marked region.

Out-of-State Survey Demographics

Out-of-State Survey Demographics	Total Sample (N = 290)
Age	
Under 18	1.03%
18 – 24	15.52%
25 – 34	32.41%
35 – 54	28.62%
55+	22.41%
Gender	
Female	64.48%
Male	34.48%
Prefer not to say	1.03%

Household Size	
1	14.48%
2	33.79%
3	20.34%
4+	31.38%
Household Income	
Below $50,000 / year	38.97%
$50,000 - $100,000 / year	25.86%
$100,001+ / year	17.59%
Prefer not to say	17.59%
Education Level	
Partial High School	3.79%
High School	27.24%
Trade School	13.79%
Partial College	3.79%
Bachelor Degree	34.14%
Advanced Degree	17.24%
Travel Party Size	
0 Adults	1.03%
0 Children	36.90%
1 Adult	17.24%
1 Child	21.38%
2 Adults	63.45%
2 Children	14.48%
3 Adults	8.62%
3 Children	8.97%
4+ Adults	9.31%
4+ Children	4.83%

Out-of-State Survey Visiting Patterns

**Seasons typically visited, lodging, and primary reasons were multiple choice questions*

Tourist Survey Visiting Patterns	Total Sample (N = 290)
Trips to Vermont per year	
Rarely	3.45%
1 Visit	41.03%
2 Visits	21.03%
3 Visits	13.79%
4+ Visits	20.69%
Length of Stay	
1 Night	15.17%
2 Nights	29.31%
3 Nights	21.72%
4 Nights – 1 Week	21.38%

1 Week – 2 Weeks More Than 2 Weeks	8.28% 4.14%
Seasons Typically Visited Spring Winter Fall Summer	 30.34% 31.03% 52.76% 57.24
Typical Lodging Hostel Don't Stay Overnight Other Rental Home Resort Second Home / Timeshare Friend's/Family's House Camping Inn / Bed & Breakfast Hotel / Motel	 0.34% 2.07% 4.48% 9.66% 12.76% 12.76% 12.76% 14.48% 24.83% 37.93%
Primary Reason For Visiting Day Trip Camping Work Trip Other Skiing Direct Markets Hiking / Backpacking Shopping Visiting Family Sightseeing	 1.03% 1.38% 5.52% 7.24% 10.34% 11.72% 15.86% 19.66% 24.83% 32.07%

Out-of-State Survey Considerations

Think about Vermont food and farms. Please respond accordingly:	Response (N=290)
Local Vermont food is affordable Strongly Agree Agree Neutral Disagree Strongly Disagree N/A	23.8% 49% 6.6% 9.3% 3.8% 7.6%
Local Vermont food is delicious	47.6%

Strongly Agree	32.4%
Agree	1%
Neutral	7.2%
Disagree	4.5%
Strongly Disagree	7.2%
N/A	
I always buy something when I visit a Vermont farmers market	
Strongly Agree	37.6%
Agree	32.1%
Neutral	2.4%
Disagree	11%
Strongly Disagree	3.8%
N/A	13.1%
I shop at farmers markets regularly in my home state	
Strongly Agree	25.9%
Agree	40%
Neutral	5.5%
Disagree	15.2%
Strongly Disagree	5.9%
N/A	7.6%
Vermont farmers markets are kid-friendly	29%
Strongly Agree	33.1%
Agree	6.2%
Neutral	7.2%
Disagree	4.5%
Strongly Disagree	20%
N/A	
Vermont farmers markets are educational	23.1%
Strongly Agree	43.1%
Agree	9%
Neutral	7.6%
Disagree	4.1%
Strongly Disagree	13.1%
N/A	
I always buy something when I visit a Vermont farm stand	
Strongly Agree	32.4%
Agree	35.1%
Neutral	3.1%
Disagree	9%
Strongly Disagree	4.8%
N/A	15.5%

I shop at farm stands regularly in my home state Strongly Agree Agree Neutral Disagree Strongly Disagree N/A	 24.8% 37.9% 4.8% 17.2% 7.6% 7.6%
Vermont farms are kid-friendly Strongly Agree Agree Neutral Disagree Strongly Disagree N/A	 29.7% 31.7% 6.2% 8.3% 3.5% 20.7%
I visit farms regularly in my home state Strongly Agree Agree Neutral Disagree Strongly Disagree N/A	 20.3% 25.2% 24.8% 16.9% 8.3% 4.5%
Vermont farms are educational Strongly Agree Agree Neutral Disagree Strongly Disagree N/A	 26.6% 37.9% 7.6% 7.2% 5.9% 14.8%

Think about the reasons that you visit [farmers markets, farm stands, farms]. Consider the following:	Farmers Markets (N=290)	Farm Stands (N=290)	Farms (N=290)	N/A (N=290)
Entertainment/Events	35.5%	20.3%	33.5%	31.4%
Pick Your Own Produce	28.3%	29%	38.7%	22.1%
To Take a Tour	24.5%	22.1%	41.4%	30%
To Buy Prepared Foods (e.g. breakfast or lunch)	42.8%	25.5%	14.8%	32.8%
To Buy Food to Cook While I'm Visiting Vermont	46.9%	49.3%	23.8%	23.5%
To Stock Up on Foods to Take Home with Me	55.2%	50.3%	26.6%	19%
To Buy Gifts or Souvenirs	42.1%	33.1%	20.3%	27.2%
To Take Pictures	31.7%	24.1%	42.4%	30.7%

It's Tradition	42.1%	35.5%	32.4%	29.7%

*Respondents were able to choose more than one answer.

Out-of-State Survey Communication Usage

Results for question: Where do you get information about where to eat/get food when you're visiting Vermont?

Response	Percentage
Family & Friends	49.3%
Online Search	33.1%
Visitor Centers	28.3%
Facebook	23.8%
Newspapers & Magazines	20%
Online Directories	14.1%
Instagram	10.7%
TV Ads	10%
Posters	9%
Chamber of Commerce	7.9%
Radio Ads	6.9%
Agritourism Associations	6.6%
Other	5.2%
Twitter	4.1%
Driving Around	1.4%
Yelp/TripAdvisor	1.4%

*Respondents were able to choose more than one answer.