**Consumer Survey for Four Direct Farm Marketing Formats**
**FY 2011**

The number of direct-marketing farms and ranches has grown as interest in buying locally has emerged as a significant consumer trend, but conducting market research is not feasible for many small family farms. Institutional assistance with market research is vital to help new market entrants, and to keep long-term growers up-to-date regarding changes in the demographics and purchasing behavior of their customers. In 1998, the Minnesota Department of Agriculture surveyed consumers at farmers markets and three types of direct-marketing farms (berry farms, Christmas tree farms, and apple orchards) to identify demographic and purchasing patterns, and to obtain specific feedback about services received. Since 1998, there have been significant changes in how farms interact with their customers. Social media, websites and electronic newsletters were uncommon or unavailable just a decade ago.

For this study, the 1998 survey instruments were updated, and customers at 106 Minnesota farms and farmers markets were surveyed. Responses were aggregated at the statewide level, and the findings were communicated through growers associations as well as directly to the participating farms and markets. The new data will help farmers with their marketing efforts, including customer service training, retail-area design, advertising selection and more, and serve as a baseline for identifying future trends that may impact direct marketers. Sector reports contain the survey results and summarize key findings.

**FINAL REPORT**

**2011 Christmas Tree Survey**

**2012 Farmers Market Consumer Survey**

**2012 Berry Customer Survey**

**2012 Apple Orchard Consumer Survey**

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*FINAL REPORT*
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***Issue***

Direct-marketing farms and ranches have grown in number as interest in buying locally has emerged as a significant consumer trend. Unfortunately, conducting market research is not feasible for many small family farms. Institutional assistance with market research is vital to help new market entrants, and to keep long-term growers up-to-date regarding changes in the demographics and purchasing behavior of their customers.

With the help of FSMIP, we surveyed consumers at Minnesota farmers markets and three types of direct-marketing farms (berry farms, Christmas tree farms, apple orchards) in 1998. The objective of that FSMIP-funded project was to identify consumer demographic and purchasing patterns, and to obtain specific feedback about services received. We know from that set of surveys that buying habits and demographics varies widely from one type of direct marketing business to another. For example, consumers surveyed in 1998 were driving an average of over 16 miles to reach an apple orchard, while that number was only 4.5 miles for farmers' markets.

There has also been significant change in how farms interact with their customers. Social media, websites and electronic newsletters were uncommon or unavailable just a decade ago. Identifying trends and changes to the demographic and purchasing patterns of consumers who purchase from direct marketers is needed to help farmers with their marketing efforts, including customer service training, retail-area design, advertising selection and more.

***Project Approach***

Our approach to this issue was to conduct primary research by partnering directly with farms and farmers markets to survey their customers, aggregate responses at the statewide level, and report our findings through growers associations as well as directly to participants. Our work plan broke this process down into five steps.

1. Review, refine, and reproduce a survey tool that gathers demographic and purchasing habits data from consumers at four types of direct-farm markets.
    a. We developed our survey after reviewing the questions and results from the 1998 survey as well as after seeking input from individual farms and markets. We developed similar but separate surveys for four groups: Christmas tree farms, berry farms, farmers markets and apple orchards. The survey tool was primarily a post card that contained an invitation to the customer to help the farm/market improve its service. The card contained a URL and QR code that was unique to that farm/market so that we'd be able to provide participating farms/markets with the responses that came from their customers. Everyone received the aggregate totals but only the participating farm could see the specific results attributed to their customers. We also offered the survey in written form to

customers who preferred not to take the survey via a website but were willing to share their feedback.

2. Enlist the support and participation of 10% of the available farms/markets in each of those four farm and market categories, and disseminate surveys to participants.
    a. In each case, we surpassed the 10% mark (see table below in results section). We recruited participants through our member newsletter which is distributed to over 1,200 farms and markets that participate in the Minnesota Grown Program and by having farms/markets sign up when we exhibited at their educational conferences.

3. Collect, summarize and distribute the data for individual participating farms.
    a. We utilized Constant Contact as our software program for collecting survey responses and then exported the data to Excel for aggregating and analysis.

4. Summarize the data for all four business types to compare results between categories, and to compare to 1998 results - to identify changes in consumer-base and purchasing behavior.
    a. We generated a separate report for each of the surveys. We believe that the customer data in these reports is a powerful resource that will help farms/markets become more efficient in the marketing efforts by better understanding their customers.

5. Extend the survey results to the greatest number of growers and markets possible, with the ultimate goal of encouraging more effective marketing by growers across the country.
    a. We have had the pleasure of presenting our findings at several educational conferences, including the Minnesota Fruit and Vegetable Growers Association, Minnesota Apple Growers Association, Minnesota Farmers Market Association and the Minnesota Christmas Tree Growers Association. These presentations have been very well received by attendees and each has generated excellent questions and discussion among farms/markets. Each of the four printed reports is available in a variety of file formats and we are happy to mail copies upon request.

***Partner Contributions***

We were fortunate to be able to work with dedicated grower associations that assisted us in several key steps throughout this project:

- Minnesota Fruit and Vegetable Growers Association: Assisted by printing our request for participants in their newsletter, providing booth space at their annual educational conferences to recruit participants and by providing quality time during the educational program to present the results of the berry survey.
- Minnesota Christmas Tree Association: Assisted by printing our request for participants in their newsletter, providing booth space at their annual educational conferences to

recruit participants and by providing quality time during the educational program to present the results of the Christmas tree survey.

- Minnesota Apple Growers Association: Assisted by providing booth space at their annual educational conferences to recruit participants and by providing quality time during the educational program to present the results of the apple orchard survey.
- Minnesota Farmers Market Association: Assisted by providing booth space at their annual educational conferences to recruit participants and by providing quality time during the educational program to present the results of the farmers market survey.

In addition to the associations, our participating farms/markets volunteered to distribute post cards to their customers and to encourage customers to participate. We did not charge a fee for farms/markets to participate.

***Results***

Each of the four surveys exceeded our target number of participating locations and all but the apple orchard survey exceeded our target number of surveys entered. We received more than 2,500 completed surveys from customers representing a total of 106 different farms/markets. From this standpoint, the project exceeded our initial objectives. The table below indicates our target numbers from our application along with the actual number of locations and completed surveys.

We emphasized geographic diversity in our cooperators and were fortunate to receive participation throughout the state. Each survey report includes a map showing the location of participating farms/markets.

| | Potential participants | Target # of locations (10%) | Actual Locations | Target # of surveys | Actual # of surveys |
|---|---|---|---|---|---|
| Christmas Tree Farms | 54 | 5 | 10 | 145 | 193 |
| Berry Farms | 92 | 9 | 21 | 549 | 744 |
| Farmers Markets | 128 | 13 | 57 | 676 | 1,121 |
| Apple Orchards | 115 | 12 | 18 | 576 | 469 |
| ***TOTAL*** | 389 | 39 | 106 | 1,946 | 2,527 |

Because of significant weather related issues affecting berry growers and apple orchards, several producers who originally planned to participate opted not to distribute postcards. A very warm spring, late hard frost, severe weather and drought conditions severely impacted crop yields and harvest schedules. As a result, nearly 1/3 of the berry growers who originally agreed to participate chose to drop out of the survey. Many apple growers were also reluctant to participate due to poor expected crop yields. Most sources estimate that Minnesota's apple harvest was less than 40% of normal. Fortunately, we were able to recruit enough participants to surpass our target number of participating farms and for the number of surveys received.

One key lesson learned was to always recruit enough cooperating farms/markets so that even if several of them aren't able to follow through with their commitment there will be enough responses to yield useful results.

Along with gathering the data, we were able to present the findings of each survey to the relevant statewide producer association during their annual educational conference.

***Benefits***

The immediate benefit of this project was the ability to provide a statewide snapshot of customer demographics and preferences to each of the four categories of direct marketers. The resulting data has benefits on multiple levels:

- Participating farms/markets received the responses from their customers and were able to compare their own customers with statewide averages.
- All farms/markets have access to the statewide averages and key findings of the reports.
- The Minnesota Grown Program is able to use the data to help inform its statewide marketing and promotional programs based on customer demographics and behavior.

The existence of this new data will become a baseline that we can use in conjunction with future surveys to identify trends that will impact direct marketers.

***Recommendations***

Previous to this project, the most recent statewide surveys were conducted in 1998. Because so many years have passed in between surveys, there is relatively little value in trying to compare much of the data between the two surveys. Our recommendation is to conduct surveys every three years. This should be often enough to detect changes as they occur but without the expense of conducting them annually.

We recommend continued use of custom URL's and QR codes as a way to facilitate online survey taking by customers and to allow evaluators to separate responses by the farm/market.

***Beneficiaries***

The most direct beneficiaries are the 106 farms/markets that participated in the survey. They received the benefit of seeing responses from their own customers and being able to compare themselves to statewide averages. The participating farms/markets include 10 Christmas tree farms, 18 apple orchards, 21 berry farms and 57 farmers markets.

The survey results are also valuable to farms/markets that did not participate in the survey because the statewide averages are significant and helpful in making marketing decisions. We reached the greatest number of farms/markets possible by presenting the results at statewide conferences. We were approached by several farms/markets that volunteered that after hearing our presentations they wished they would have participated in the survey and that they were eager to participate the next time we do something similar.

As shown in the individual survey reports, we received participation from growers throughout the state. All participating farms/markets sell directly to the consumer. Although we accepted all interested farms/markets, we did make an effort to receive participation from farms/markets of varying size.

### *Additional Information*

We have presented the survey results to several statewide grower associations. These include the Minnesota Fruit and Vegetable Growers Association, Minnesota Apple Growers Association, Minnesota Farmers Market Association and the Minnesota Christmas Tree Association. Each survey has its own separate report which is available electronically as well as in printed form upon request.

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# 2011 Christmas Tree Consumer Survey

The Ag Marketing & Development Division of the Minnesota Department of Agriculture, in cooperation with the Minnesota Christmas Tree Association (MCTA) and Minnesota choose-and-cut Christmas tree farms, surveyed consumers during the 2011 season. State funds for this project were matched with Federal funds under the Federal-State Marketing Improvement Program of the Agricultural Marketing Service, U.S. Department of Agriculture. The objective was to identify demographic and purchasing patterns of current customers, as well as to obtain feedback from customers about services farms provide. A second objective was to compare results with data gathered from a similar survey performed in 1998. The MDA thanks the farms for their assistance in the distribution and collection of the surveys.

## Methodology

Christmas tree farms were recruited using the Minnesota Grown Member Update, a bimonthly e-newsletter that is distributed to the program's over 1,200 members. Farms were also approached at the 2011 MCTA annual meeting.

Surveys were distributed to ten choose-and-cut Christmas tree farms that contributed results. A total of 193 consumers engaged in the survey through two methods. Minnesota Grown mugs with hot chocolate packets were provided as incentive to complete the survey on site. Alternately, a postcard with URL and QR code was provided for the consumer to fill out the survey online. As further incentive to complete a survey through either method, participants had the option of including their name and email address to receive one fifty dollar gift certificate to the tree farm they visited.

## Results

Question 1: Did your family have a real Christmas tree when you were a child?

| | |
|---|---|
| Yes, every year | 84% |
| Some years | 8% |
| No, never | 8% |

Question 2: How many times have you purchased a real Christmas tree?

| | |
|---|---|
| This is my first year | 2% |
| 2-5 years | 11% |
| 6-10 years | 11% |
| 11-15 years | 12% |
| 16 or more years | 65% |

Question 3: In the last five years, have you purchased trees from other locations?

| | |
|---|---|
| Yes | 52% |
| No | 48% |

Question 4: Why have you chosen this choose and cut farm today? (only choose one option)

| | |
|---|---|
| Convenient location | 15% |
| Most competitive prices | 1% |
| Traditionally good quality trees | 38% |
| Good customer service and/or amenities | 12% |
| Had the variety of tree you prefer | 5% |
| Saw or heard an advertisement | 12% |
| Location had a special event | 0% |
| To use a coupon | 2% |
| Other | 14% |

Question 5: Did you come with someone to buy your tree? (Select all that apply)

| | |
|---|---|
| Yes, with child(ren) | 63% |
| Yes, with spouse or significant other | 62% |
| Yes, with other relatives | 24% |
| Yes, with a friend | 4% |
| No, I came by myself | 7% |

Question 6: Who in your household is most responsible for choosing your tree?

| | |
|---|---|
| Female (adult) | 67% |
| Male (adult) | 19% |
| Child(ren) | 14% |

Question 7: How did you find out about this choose and cut farm this year? (Select all that apply)

| | |
|---|---|
| Television ad | 0% |
| Radio ad | 0% |
| Flyer | 3% |
| Direct mail (postcard/newsletter) | 11% |
| Newspaper | 3% |
| Online (website) | 15% |
| Google or other search engine | 2% |
| Electronic newsletter | 12% |
| Facebook | 0% |
| Sign/billboard/poster | 15% |
| Word of mouth/recommendation | 24% |
| Minnesota Grown Directory | 6% |
| Other | 31% |

Question 8: How would you rate the following:

| | 1- Poor | 2- Below Average | 3- Average | 4-Very Good | 5- Excellent |
|---|---|---|---|---|---|
| Quality | 0% | 1% | 6% | 35% | 50% |
| Variety | 0% | 1% | 11% | 33% | 46% |
| Price | 0% | 3% | 34% | 34% | 22% |
| Environment (appearance, cleanliness) | 0% | 0% | 5% | 32% | 52% |
| Helpfulness/staff | 0% | 0% | 2% | 16% | 73% |
| Parking | 0% | 1% | 13% | 25% | 54% |
| Restrooms (if applicable) | 1% | 2% | 16% | 15% | 21% |
| Availability of saws, ropes, etc. | 0% | 0% | 3% | 17% | 49% |
| Overall quality of your experience today | 0% | 1% | 2% | 20% | 68% |

Question 9: What could this location offer that would significantly increase your desire to buy trees here?

| | |
|---|---|
| Nothing | 62% |
| Tree care information | 7% |
| Food and/or beverages | 12% |
| Animal barnyard or animal rides | 15% |
| Santa | 14% |
| Sleigh Rides | 11% |
| Gift Shop | 8% |
| Other | 10% |

Question 10: What is your favorite type of tree?

| | |
|---|---|
| Scotch Pine | 5% |
| White Pine | 3% |
| Norway Pine | 2% |
| Balsam Fir | 24% |
| Colorado (Blue) Spruce | 10% |
| Fraser Fir | 47% |
| Black Hills (White) Spruce | 0% |
| Canaan Fir | 5% |
| Other | 3% |

Question 11: What type of tree did you purchase today?

| | |
|---|---|
| Scotch Pine | 9% |
| White Pine | 8% |
| Norway Pine | 1% |
| Balsam Fir | 25% |
| Colorado (Blue) Spruce | 4% |
| Fraser Fir | 42% |
| Black Hills (White) Spruce | 0% |
| Canaan Fir | 7% |
| Other | 4% |

Question 12: How many weeks will you keep the tree in your home?

| | |
|---|---|
| One | 0% |
| Two | 5% |
| Three | 24% |
| Four | 37% |
| More than four | 35% |

Question 13: Do you also own an artificial tree?

| | |
|---|---|
| Yes | 22% |
| No | 78% |

Question 14: If you own an artificial tree, in most years you...

| | |
|---|---|
| Have displayed both an artificial and real tree | 12% |
| Have displayed only a real tree | 22% |
| Have displayed only an artificial tree | 5% |

Question 15: How much did your household spend today on real Christmas trees?

The average amount spent on a real Christmas tree was $57.07.

| | |
|---|---|
| $20-$30 | 9% |
| $31-$40 | 8% |
| $41-$50 | 1% |
| $51-$60 | 25% |
| $61-$70 | 4% |
| $71-$80 | 42% |
| $81-$90 | 0% |
| $91 or more | 7% |

Question 16: How much did your household spend in addition to your Christmas tree purchase today?

The average purchase of non-tree items at the farm or retail lot averaged $16.14.

| | |
|---|---|
| $0 | 41% |
| $1-$10 | 12% |
| $11-$20 | 6% |
| $21-$30 | 10% |
| $31-$40 | 2% |
| $41-$50 | 16% |
| $51-$60 | 8% |
| $61-$70 | 1% |
| $71-$80 | 1% |
| $81-$90 | 0% |
| $91 or more | 2% |

Question 17: How far is this farm from your home?

The average distance a consumer traveled to a retail lot was 7 miles. A conservative estimate of how far consumers drove, on average, to choose-and-cut farms is about 26 miles.

| | |
|---|---|
| 0-5 miles | 42% |
| 6-10 miles | 7% |
| 11-15 miles | 6% |
| 16-20 miles | 8% |
| 21-25 miles | 5% |
| 26-30 miles | 2% |
| 31-35 miles | 6% |
| 36-40 miles | 2% |
| 41-45 miles | 1% |
| More than 46 miles | 20% |

Question 18: Do you think that it is environmentally friendly to purchase a real christmas tree?

| | |
|---|---|
| Yes | 88% |
| No | 3% |
| Undecided | 10% |

Question 19: Do you own a smartphone?

| | |
|---|---|
| Yes | 58% |
| No | 42% |

Question 20: Do you have a Facebook page?

| | |
|---|---|
| Yes | 77% |
| No | 23% |

Question 21: If you have a Facebook page, how many times do you sign on to your page each week/day?

| | |
|---|---|
| Less than 1 time per week | 7% |
| 1 time per week | 3% |
| 2-3 times per week | 3% |
| 4-5 times per week | 7% |
| 1-2 times per day | 22% |
| 3-4 times per day | 25% |
| 5-6 times per day | 2% |
| 7-8 times per day | 3% |
| 9-10 times per day | 2% |
| 11-12 times per day | 2% |
| 13 or more times per day | 3% |
| N/A | 21% |

Question 22: Do you have children that currently live in your household?

| | |
|---|---|
| Yes | 70% |
| No | 30% |

Question 23: Are you male or female?

| | |
|---|---|
| Male | 24% |
| Female | 76% |

Question 24: What is your current marital status?

| | |
|---|---|
| Married | 71% |
| Not currently married | 29% |

Question 25: What is your highest level of education?

| | |
|---|---|
| Some high school | 1% |
| High school graduate | 9% |
| Some college | 18% |
| Associate degree | 5% |
| Bachelor’s degree | 26% |
| Master’s degree | 26% |
| Professional degree | 6% |
| Doctorate degree | 8% |

Question 26: Please indicate your age group.

| |
|---|
| The average age of consumers is about 45. |

| | |
|---|---|
| Under 20 | 2% |
| 20-24 | 1% |
| 25-29 | 11% |
| 30-34 | 6% |
| 35-39 | 11% |
| 40-44 | 22% |
| 45-49 | 8% |
| 50-54 | 12% |
| 55-59 | 16% |
| 60-64 | 4% |
| 65-69 | 2% |
| 70 and over | 3% |
| Decline to answer | 4% |

Question 27: What is your household income?

| |
|---|
| Consumer's average household income was $89,560. |

| | |
|---|---|
| Less than $10,000 | 2% |
| $10,000 to $19,999 | 5% |
| $20,000 to $29,999 | 3% |
| $30,000 to $39,999 | 2% |
| $40,000 to $49,999 | 5% |
| $50,000 to $59,999 | 5% |
| $60,000 to $69,999 | 12% |
| $70,000 to $79,999 | 5% |
| $80,000 to $89,999 | 19% |
| $90,000 to $99,999 | 7% |
| $100,000 to $149,999 | 8% |
| $150,000 or more | 10% |
| Decline to answer | 19% |

Key Findings

Variety: In 1998 the top three tree varieties indicated by customers were Balsam fir, scotch pine and Fraser fir. The 2012 survey responses show preference to Fraser fir followed by Balsam fir and the Colorado (blue) spruce. These results verify the continued decline in preference for scotch pine trees, a longer-needled species. Short needle species like the Balsam and Fraser have increased in popularity.

Family: The majority of consumers who visit choose-and-cut Christmas tree farms have children, totaling 70 percent of those surveyed. Of these customers, 63 percent brought their children indicating that 90 percent of those who have children bring them to pick out a tree.

Location: While consumers travel an average of seven miles to visit a retail lot they will go an average of 26 miles, and often further, to visit a choose-and-cut farm. Retail lots favor convenience while the customer visits the farm for an experience.

Social Media: 59 percent of those surveyed visit Facebook more than one time per day. Social media is an opportunity to reach out to consumers, acting as a megaphone for recommendations.

Tradition: Of those surveyed, 84 percent said their family had a real Christmas tree every year when they were a child. The other 16 percent is split evenly between those who had a real tree some years and those who had never had a real tree when they were a child. A strong emphasis on tradition brings customers back year after year.

Entertainment: When asked if the farm could provide anything to significantly increase the desire to buy trees at the location, survey results from 1998 show an insignificant change in consumer opinion. Most shoppers do not feel anything additional is needed, although a marginal increase is shown for interest in animals, refreshments and Santa characters.

| **Year of Survey** | **1998** | **2011** |
|---|---|---|
| Nothing | 64% | 62% |
| Tree care information | 8% | 7% |
| Food and/or beverages | 9% | 12% |
| Animal barnyard, animal rides | 10% | 15% |
| Santa | 7% | 14% |
| Sleigh rides | N/A | 11% |
| Gift shop | N/A | 8% |
| Other | 13% | 10% |

Appendix

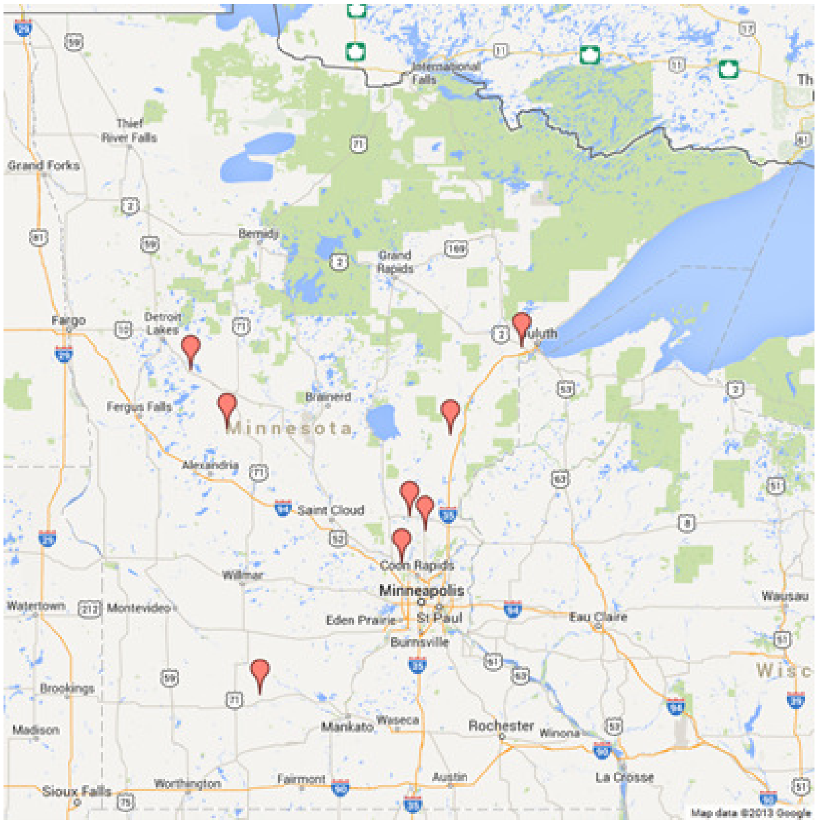



*Figure 1* This map shows the locations of participating Christmas tree farms.


*Figure 2* Paper surveys were available for consumers to fill on site, or they could opt to take a postcard with the link to the online survey.

# 2012 Farmers Market Consumer Survey

The Ag Marketing & Development Division of the Minnesota Department of Agriculture, in cooperation with Minnesota farmers markets, surveyed consumers during the summer of 2012. State funds for this project were matched with Federal funds under the Federal-State Marketing Improvement Program of the Agricultural Marketing Service, U.S. Department of Agriculture. The objective was to identify demographic and purchasing patterns of current customers, as well as to obtain feedback from customers about services provided. The MDA thanks the farmers markets for their assistance in the distribution and collection of the surveys.

## Methodology

Farmers markets were recruited using the Minnesota Grown Member Update, a bimonthly e-newsletter that is distributed to over 1,200 members. Markets were also approached during the Minnesota Farmers Market Association (MFMA) annual meeting in 2012. In all, 57 farmers markets in 25 counties participated in the survey. Each participating market received a private copy of their market's individual results to compare to aggregated data. The statewide statistics were shared at the 2013 MFMA meeting.

A total of 1,121 responses were generated. Market managers received postcards with a QR code and shortened URL linking to an online survey. Printed copies of the survey were also provided and could be turned in on site. As incentive to complete the survey, one winner from all locations combined received a $50 gift certificate to the market they visited.

## Results

Question 1: How many years have you shopped at any farmers market?

| | |
|---|---|
| This is my first year | 7% |
| 2-3 | 17% |
| 4-5 | 18% |
| 6-7 | 11% |
| 8-9 | 7% |
| 10 or more | 41% |

Question 2: How long have you been coming to this farmers market?

| | |
|---|---|
| This is my first year | 24% |
| I have shopped at this market for 2-3 years | 35% |
| I have shopped at this market for 4-5 years | 20% |
| I have shopped at this market for 6 or more years | 21% |

Question 3: How often do you shop at farmers markets?

| | Never | 1-2 times/season | Once/ month | Once/week | More than once/week |
|---|---|---|---|---|---|
| This market | 4% | 13% | 20% | 59% | 3% |
| Other markets | 20% | 44% | 19% | 14% | 3% |

Question 4: Compared to the previous year, are you shopping at farmers markets more or less frequently?

| | More Frequently | Less Frequently | About the Same |
|---|---|---|---|
| This market | 48% | 8% | 44% |
| Other markets | 16% | 31% | 53% |

Question 5: When choosing between vendors that offer similar products, how important are the following factors in your final decision to buy?

| | Very important | Quite important | Fairly important | Slightly important | Not at all important |
|---|---|---|---|---|---|
| Quality of products | 81% | 17% | 1% | 0% | 0% |
| Variety of products | 30% | 30% | 23% | 11% | 5% |
| Price of products | 41% | 29% | 23% | 5% | 1% |
| Organic certification | 15% | 19% | 25% | 22% | 18% |
| Minnesota Grown labeling | 35% | 29% | 17% | 12% | 6% |
| Previous relationship with vendor | 22% | 26% | 23% | 16% | 12% |
| Cleanliness of vendor’s space | 45% | 35% | 14% | 4% | 1% |
| Courteousness/friendliness of vendor | 44% | 38% | 13% | 3% | 1% |
| Ability to pay with credit/debit card | 7% | 7% | 12% | 19% | 55% |

Question 6: During this visit, how many vendors did you buy from?

| | |
|---|---|
| 0 | 2% |
| 1 | 7% |
| 2 | 23% |
| 3 | 30% |
| 4 or more | 38% |

Question 7: How much did you spend at this farmers market during this visit?

| | |
|---|---|
| $0 | 1% |
| $1-9 | 13% |
| $10-19 | 29% |
| $20-29 | 24% |
| $30-39 | 14% |
| $40-49 | 7% |
| $50-59 | 5% |
| $60-69 | 2% |
| $70-79 | 1% |
| $80-89 | 1% |
| $90-99 | 0% |
| $100 or more | 2% |

Question 8: How much did your household spend at other businesses nearby the market as a result of this visit to the market (i.e. lunch at a nearby restaurant, gas at a nearby filling station, purchases at nearby retail stores)

| | |
|---|---|
| $0 | 56% |
| $1-9 | 8% |
| $10-19 | 9% |
| $20-29 | 7% |
| $30-39 | 5% |
| $40-49 | 3% |
| $50-59 | 4% |
| $60-69 | 1% |
| $70-79 | 1% |
| $80-89 | 1% |
| $90-99 | 0% |
| $100 or more | 2% |

Question 10: How did you pay for the items that you purchased today? (Mark all that apply)
Question 11: How would you prefer to pay at a farmers market?

| | How did you pay | How would you prefer to pay |
|---|---|---|
| Cash | 95% | 77% |
| Credit/Debit | 8% | 21% |
| Check | 4% | 2% |
| EBT/SNAP/FMNP/WIC | 3% | N/A |
| Other | 2% | N/A |

Question 12: How often do you purchase the following items at farmers markets?

| | Never | Occasionally | Regularly |
|---|---|---|---|
| Fruit/Berries | 6% | 58% | 36% |
| Vegetables | 1% | 12% | 87% |
| Eggs, milk, or other dairy | 50% | 35% | 14% |
| Cut flowers | 40% | 53% | 7% |
| Potted plants, baskets | 50% | 47% | 3% |
| Packaged, prepared foods (jams, jellies, sauces, candy, hot food) | 21% | 66% | 13% |
| Handmade crafts, soaps | 50% | 46% | 4% |
| Bread, baked goods | 16% | 57% | 28% |
| Honey | 28% | 59% | 12% |
| Meats, poultry, fish | 47% | 40% | 13% |

Question 13: Did someone come with you to shop at the market today? (Mark all that apply)

| | |
|---|---|
| No, I came by myself | 42% |
| Child/Children | 23% |
| Spouse/Partner | 31% |
| Other relative | 9% |
| Friend(s) | 10% |

Question 14: From June through September, where do you buy your fresh produce?

| | Exclusively (100%) | Mostly (61-99%) | Often (41-60%) | Sometimes (20-40%) | Seldom (5-20%) | Rarely or Never |
|---|---|---|---|---|---|---|
| Traditional Supermarket (Cub, Rainbow) | 1% | 17% | 22% | 28% | 16% | 16% |
| Supercenter (Walmart, Super Target) | 0% | 5% | 11% | 19% | 20% | 45% |
| Farmers Market | 2% | 34% | 29% | 20% | 10% | 4% |
| From the farm (CSAs, roadside stand, pick your own farm) | 0% | 6% | 6% | 14% | 25% | 49% |
| Discount store (Sam's Club, CostCo, Aldi) | 0% | 3% | 7% | 14% | 18% | 57% |
| Natural Foods Market (Whole Foods Market, food co-ops) | 1% | 6% | 9% | 17% | 23% | 45% |
| Convenience store (corner store, gas station) | 0% | 0% | 1% | 2% | 7% | 89% |

Question 15: How important were the following in your choice to visit this market today?

| | Very important | Quite important | Fairly important | Slightly important | Not at all important |
|---|---|---|---|---|---|
| Location | 57% | 25% | 12% | 4% | 2% |
| Prices | 28% | 34% | 25% | 11% | 4% |
| Quality of products | 66% | 29% | 4% | 1% | 1% |
| Variety of products | 41% | 40% | 15% | 3% | 1% |
| Customer service | 35% | 38% | 21% | 5% | 1% |
| Supporting family farmers | 67% | 23% | 7% | 2% | 1% |
| Buying locally grown food | 70% | 20% | 8% | 1% | 1% |
| This market accepts SNAP/EBT/FMNP/WIC | 6% | 4% | 5% | 7% | 78% |
| Events/Activities/Music | 3% | 7% | 14% | 28% | 48% |

Question 16: How does this farmers market compare to the grocery store or supermarket you most often shop at, in terms of:

| | Much better | Somewhat better | About the same | Somewhat worse | Much worse |
|---|---|---|---|---|---|
| Variety | 23% | 24% | 29% | 20% | 3% |
| Quality | 59% | 29% | 11% | 1% | 0% |
| Price | 23% | 28% | 31% | 16% | 1% |
| Atmosphere | 63% | 26% | 9% | 1% | 0% |
| Customer service | 46% | 30% | 23% | 1% | 0% |
| Parking | 25% | 16% | 42% | 13% | 4% |

Question 17: If you have shopped at other farmers markets recently, how does this farmers market compare to other farmers markets in terms of:

| | Much better | Somewhat better | About the same | Somewhat worse | Much worse |
|---|---|---|---|---|---|
| Variety | 20% | 21% | 41% | 16% | 2% |
| Quality | 16% | 21% | 61% | 1% | 0% |
| Price | 11% | 18% | 65% | 5% | 1% |
| Atmosphere | 25% | 27% | 40% | 7% | 0% |
| Customer service | 17% | 23% | 59% | 1% | 0% |
| Parking | 24% | 24% | 39% | 8% | 3% |

Question 18: Which of the following influenced your decision to shop at this market? Mark all that apply

| | |
|---|---|
| e-newsletter | 14% |
| TV/Radio program | 1% |
| Facebook, Twitter, Yelp or other social media | 10% |
| Article in monthly publication | 5% |
| Sign/billboard | 22% |
| Flyer/mailing | 5% |
| TV ad | 1% |
| Radio ad | 1% |
| Newspaper ad | 9% |
| Newspaper article | 7% |
| Recommendation from family/friend | 28% |
| Minnesota Grown Directory (online) | 5% |
| Minnesota Grown Directory (printed) | 5% |
| Farmers market website | 15% |
| Online search engine ad | 2% |
| Other | 34% |

Question 19: Do you own a smartphone?

| | |
|---|---|
| Yes | 45% |
| No | 53% |
| Other | 1% |

Question 20: How often do you use the following social media platforms?

| | I do not use | < 1 time per week | 1-3 times per week | 4-7 times per week | 2-3 times per day | 4-5 times per day | 5+ times per day |
|---|---|---|---|---|---|---|---|
| Facebook | 25% | 13% | 9% | 13% | 15% | 9% | 15% |
| Twitter | 83% | 7% | 4% | 2% | 1% | 1% | 2% |
| LinkedIn | 70% | 20% | 7% | 2% | 0% | 0% | 0% |
| Pinterest | 72% | 12% | 6% | 5% | 3% | 0% | 2% |

Question 21: How far was this market from your home?

| | |
|---|---|
| 1-8 blocks (less than 1/2 mile) | 14% |
| 9-15 blocks (1/2-1 mile) | 11% |
| 1-2 miles | 18% |
| 3-4 miles | 21% |
| 5-9 miles | 17% |
| 10-15 miles | 10% |
| 16-20 miles | 4% |
| 21+ miles | 6% |

Question 22: How did you come to the market today?

| | |
|---|---|
| Walk | 8% |
| Bike | 3% |
| Public bus | 0% |
| Personal vehicle | 86% |
| Light rail | 0% |
| Taxi | 0% |
| Other | 1% |

Question 23: Please mark the following that apply to you.

| | |
|---|---|
| Male | 15% |
| Female | 82% |

Question 24: If you have children at home, which category best describes their age(s)? (Mark all that apply)

| | |
|---|---|
| 0-5 years | 32% |
| 6-10 years | 28% |
| 11-14 years | 19% |
| 15-17 years | 17% |
| 18 years or older | 38% |

Question 25: Which category best describes your age?

| | |
|---|---|
| Younger than 18 | 1% |
| 18-24 | 3% |
| 25-29 | 7% |
| 30-34 | 10% |
| 35-39 | 8% |
| 40-44 | 7% |
| 45-49 | 10% |
| 50-54 | 13% |
| 55-59 | 13% |
| 60-64 | 11% |
| 65-69 | 8% |
| 70 and over | 6% |

Question 26: How would you describe your race?

| | |
|---|---|
| American Indian or Alaska Native | 1% |
| White | 91% |
| Black or African American | Less than 1% |
| Asian (India) | Less than 1% |
| Chinese | Less than 1% |
| Korean | Less than 1% |
| Japanese | Less than 1% |
| Other Asian (Hmong, Laotian, Thai) | Less than 1% |
| Pacific Islander | Less than 1% |
| Hispanic/Latino | 1% |
| Other | 1% |

Question 27: Which category best describes your household annual income?

| | |
|---|---|
| Less than $10,000 | 3% |
| $10,000 to $14,999 | 2% |
| $15,000 to $24,999 | 5% |
| $25,000 to $34,999 | 7% |
| $35,000 to $49,999 | 10% |
| $50,000 to $74,999 | 19% |
| $75,000 to $99,999 | 13% |
| $100,000 to $149,999 | 13% |
| $150,000 to $199,999 | 4% |
| $200,000 or more | 2% |
| Prefer not to answer | 16% |

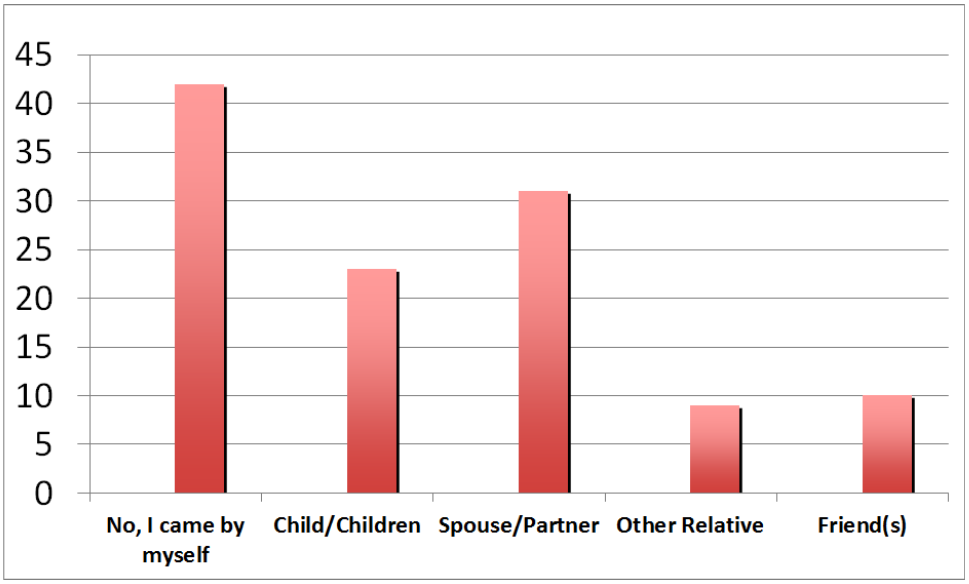
Question 28: Please indicate the highest level of education you have completed.

| | |
|---|---|
| High School/GED | 8% |
| Some college (no degree) | 20% |
| Associate's degree | 11% |
| Bachelor's degree | 32% |
| Graduate or professional degree | 24% |

Key Findings

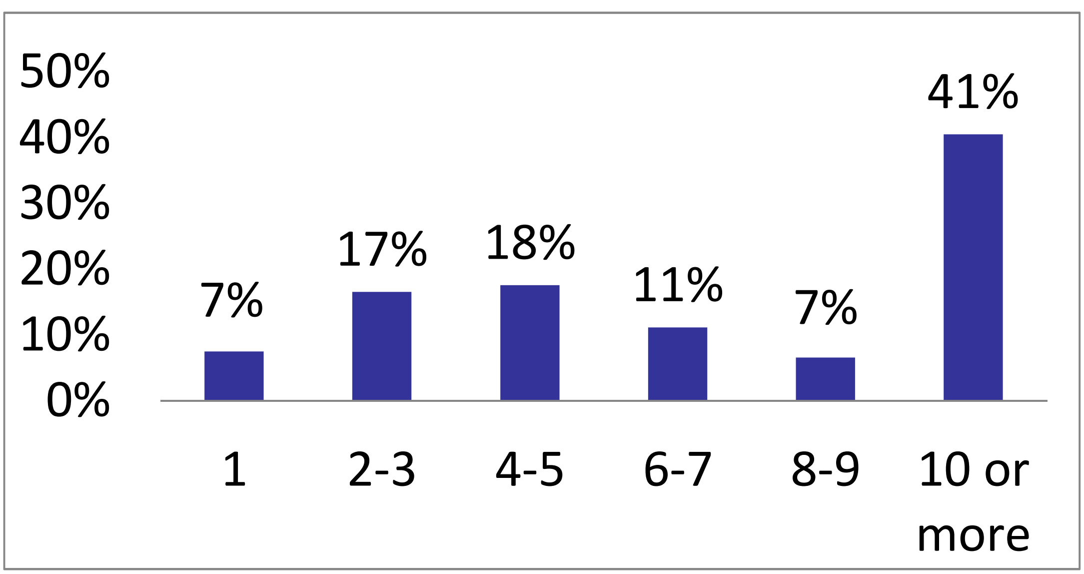
Visit Frequency: Seven percent of participants indicated that this was the first year they had attended a market. Almost half of respondents said they are attending that market more frequently than previous years. The two of these factors combined indicate a rise in market attendance. Over half of those surveyed visit their market about once per week.

Visit Behavior:




Visits to the farmers market are most commonly made alone followed by bringing a spouse or partner. Less than one in four customers brings a child or children to the market.

The chart below indicates how many years those surveyed have been attending any farmers market. Over half of participants have been shopping at their current market for less than three years and it is the first year for one in four.



Spending: Almost all or 95 percent of people at farmers markets complete their purchase using cash. While five percent pay by credit card, an additional 13 percent would prefer to do so. Although 55 percent selected the ability to pay with a credit card as a “not at all important” factor in visiting the market, 14 percent found it to be a top priority which could impact the amount spent for those customers. In total, 43 percent of customers spend less than $20 on a single visit to the market. The average purchase amount is $26.

Location: Farmers markets are hyper-local with customers traveling an average of six miles from their home. On the other hand, 86 percent of those surveyed take their personal vehicle to the market.

Variety: The variety in products offered is not ranked high in importance by consumers. However, 68 percent report making purchases from three or more vendors on their visit.

Influence: Consumers indicate that the top two reasons that they attend the market are to buy locally grown food and support family farmers. However, the third is the quality of products which ranks highest when evaluating the factors on the whole. The individuals are clear that their intention for coming to the market is to seek high quality products.

Comparing markets: In each category when the participant was asked to compare their market to other markets over half of the results indicated “about the same.” This implies that no one market has a real competitive advantage over another based on these factors.

Community Implication: 44 percent of those surveyed said they spent money at nearby businesses as a result of their visit to the market that day. The average spending at other businesses equaled $32.

Future Considerations:

-We ask how often they go to market but not how many days their particular market is open, which could skew results.

-Missed opportunity to find out if they go to/ would like to go to winter markets and what they would look for there... goes hand in hand with what about where they shop sept-june. Where are they when they’re not at the market?

How long do they stay at the market? Would they go more frequently if the market was offered at a different time or location?

Appendix

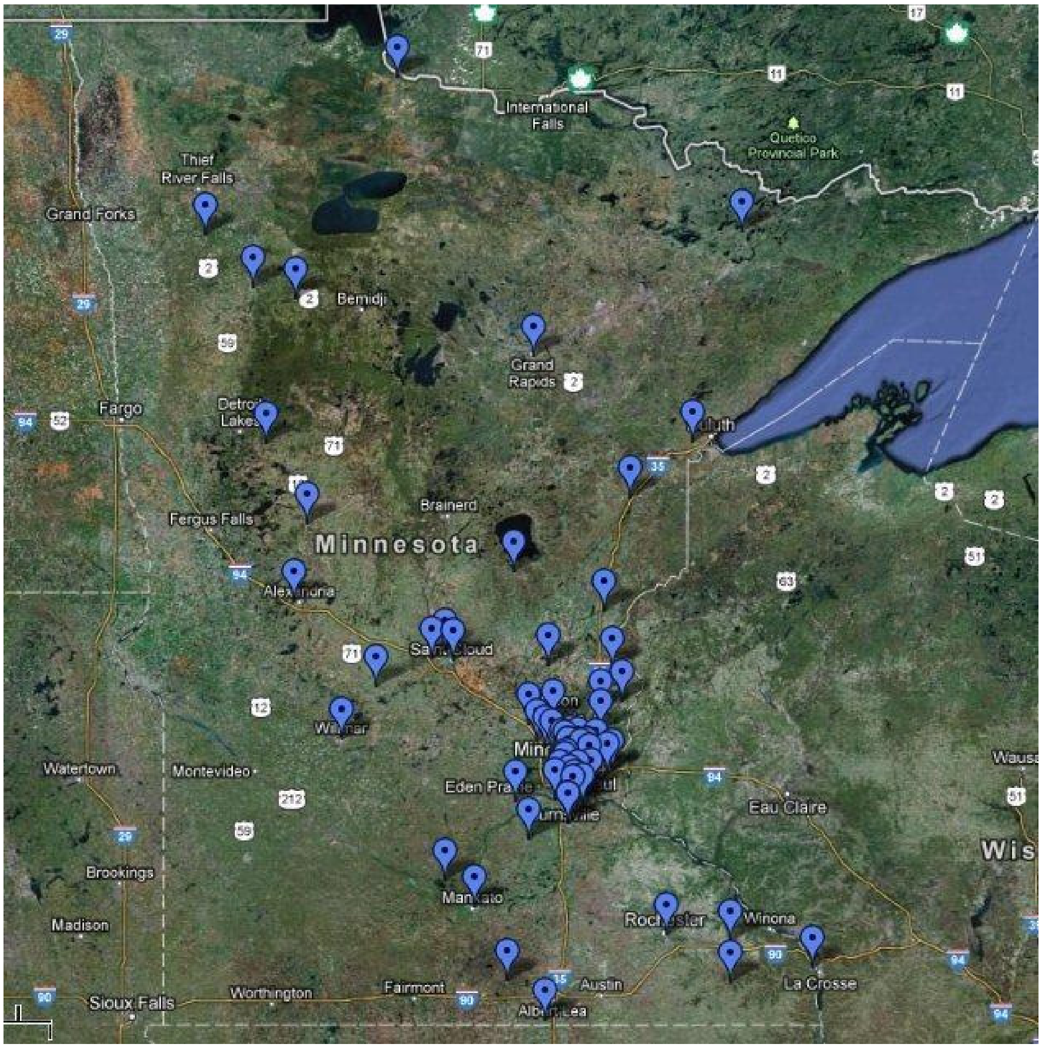



*Figure 1* The map depicts the 57 markets that contributed results to the 2012 survey.


*Figure 2* Market managers made postcards available to market consumers. The postcard includes a shortened URL and QR code specific to that market.

# 2012 Berry Customer Survey

The Ag Marketing & Development Division of the Minnesota Department of Agriculture, in cooperation with the Minnesota Fruit and Vegetable Growers Association and Minnesota pick-your-own berry farms, surveyed consumers during the summer of 2012. State funds for this project were matched with Federal funds under the Federal-State Marketing Improvement Program of the Agricultural Marketing Service, U.S. Department of Agriculture. The objective was to identify demographic and purchasing patterns of current customers, as well as to obtain feedback from customers about services farms provide. A second objective was to compare results with data gathered from a similar survey performed in 1998. The MDA thanks the MFVGA and berry farms for their assistance in the distribution and collection of the surveys.

Methodology

Pick-your-own berry farms were recruited through the Minnesota Grown bimonthly e-newsletter which is distributed to the program's over 1,200 members. Berry growers were also approached at the 2012 MFVGA annual meeting. Participation included 30 PYO farms in 20 Minnesota counties, of which 9 farms did not provide results due to weather damage and/or poor crop performance. For participating, each contributing farm received a private copy of their individual farm's results to compare to aggregate data. Statewide reports were presented at the 2013 MFVGA meeting.

Distribution of surveys to consumers occurred in three ways. Farms received postcards to hand out to customers including a shortened link and QR code to take the survey online. Paper surveys and return envelopes were provided as a secondary resource for those without computer access or preference. Additionally, MDA personnel visited 21 farms and conducted onsite interviews.

A total of 744 responses were collected: 582 online and 162 hard copies. As incentive to complete the survey, participants were given the option to include their name and email to be entered to win one fifty dollar gift certificate to the berry farm they visited.

Results

Question 1: As an adult, how many years have you picked berries at a pick-your-own berry farm previous to this year?

| | |
|---|---|
| 0 | 8% |
| 1 | 9% |
| 2 | 7% |
| 3 | 9% |
| 4 | 6% |
| 5 | 10% |
| 6 | 5% |
| 7 | 3% |
| 8 | 4% |
| 9 | 1% |
| 10 or more | 39% |

Question 2: In the previous five years, how many years have you picked berries at this farm?

| | |
|---|---|
| 0 | 27% |
| 1 | 10% |
| 2 | 11% |
| 3 | 13% |
| 4 | 9% |
| 5 | 30% |

Question 3: In the previous five years, how many years have you picked berries at other pick-your-own berry farms?

| | |
|---|---|
| 0 | 49% |
| 1 | 17% |
| 2 | 12% |
| 3 | 6% |
| 4 | 5% |
| 5 | 13% |

Question 4: Counting this visit, how many times do you intend to pick berries at this farm this year?

| | |
|---|---|
| 1 | 41% |
| 2 | 34% |
| 3 | 16% |
| 4 | 5% |
| 5+ | 8% |

Question 5: How many times do you intend to pick berries at other farms this year?

| | |
|---|---|
| 0 | 75% |
| 1 | 15% |
| 2 | 6% |
| 3 | 2% |
| 4 | 1% |
| 5 | 1% |

Question 6: How much did your household spend on berries on this visit to the farm?

Consumers spent an average of $28.86 on berries per visit.

| | |
|---|---|
| $1-10 | 8% |
| $11-20 | 30% |
| $21-30 | 22% |
| $31-40 | 15% |
| $41-50 | 10% |
| $51-60 | 6% |
| $61-70 | 3% |
| $71-80 | 2% |
| $81-90 | 2% |
| $91-100 | 2% |
| Other | 2% |

Question 7: How much did your household spend on non-berry items on this visit to the farm?

14% of consumers purchased non-berry items. The purchases made by this group averaged $10.72 per visit.

| | |
|---|---|
| We did not buy any non-berry items | 87% |
| $1-5 | 6% |
| $6-10 | 4% |
| $11-15 | 2% |
| $16-20 | 1% |
| $21-25 | 1% |
| $26-30 | 0% |
| $31-35 | 0% |
| $36+ | 0% |
| Other | 0% |

Question 9: How did you pay for the items you purchased at the farm?

| | |
|---|---|
| Cash | 46% |
| Credit/Debit card | 6% |
| Check | 48% |
| Other | 1% |

Question 10: If a farm was open during all the following times, which times would you be likely to pick berries?

| | Most likely | Somewhat likely | Not likely |
|---|---|---|---|
| Sunday morning | 30% | 19% | 51% |
| Sunday evening (after 4pm) | 17% | 19% | 65% |
| Weekday morning | 72% | 11% | 16% |
| Weekday evening (after 4pm) | 23% | 33% | 44% |
| Saturday morning | 63% | 23% | 14% |
| Saturday evening (after 4pm) | 18% | 22% | 59% |

Question 12: What type of berries did you pick at this farm on this trip?

| | |
|---|---|
| Blueberries | 19% |
| Strawberries | 86% |
| Raspberries | 5% |
| Other | 1% |

Question 13: As a child, did you visit a pick-your-own berry farm with:

| | |
|---|---|
| I never visited a PYO berry farm as a child | 52% |
| Grandparent | 5% |
| Parent | 39% |
| Extended family (aunt, uncle, cousin) | 2% |
| Friends family | 1% |
| Other | 3% |

Question 14: Did someone come with you to pick berries on this visit to the farm? (Check all that apply)

| | |
|---|---|
| No, I came by myself | 31% |
| Child/Children | 39% |
| Spouse/Partner | 25% |
| Other relative | 17% |
| Friend(s) | 13% |

Question 15: How far was this berry farm from your home?

| |
|---|
| Consumers traveled an average of 16 miles to get to their berry farm. |

| | |
|---|---|
| 0-4 miles | 15% |
| 5-9 miles | 21% |
| 10-14 miles | 21% |
| 15-19 miles | 16% |
| 20-24 miles | 11% |
| 25-29 miles | 7% |
| 30+ miles | 12% |

Question 16: How do you intend to use the berries you picked? (Check all that apply)

| | |
|---|---|
| Eat fresh | 92% |
| Use fresh berries in recipes | 56% |
| Make jam or jelly | 49% |
| Freeze | 71% |
| Give to friends and family outside of your household | 39% |
| Other | 4% |

Question 17: Why have you chosen to pick at this farm on this trip? (Rate from #1, most important, to #4, least important)

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| Location (closest berry patch to me) | 54% | 16% | 13% | 17% |
| Price | 3% | 22% | 29% | 45% |
| Quality of fruit | 34% | 37% | 25% | 4% |
| Good customer service | 9% | 25% | 32% | 34% |

Question 18: Did any of the following influence/remind you to visit this farm this year? (Mark all that apply)

| | |
|---|---|
| e-newsletter | 17% |
| TV/Radio program | 2% |
| Facebook, twitter or other social media source | 7% |
| Sign/billboard | 13% |
| Flyer or other direct mailing from the farm | 13% |
| Recommendation | 16% |
| Newspaper Ad | 11% |
| Online Ad | 5% |
| Radio Ad | 1% |
| TV Ad | 0% |
| Coupon/Other special offer | 3% |
| Other | 34% |

Question 19: Did you use any of the following to learn about this farm this year? (Mark all that apply)

| | |
|---|---|
| Online search engine, e.g. Google, Bing | 41% |
| Minnesota Grown Directory (Online) | 15% |
| Minnesota Grown Directory (Printed) | 5% |
| Farm website | 36% |
| Other | 26% |

Question 20: Which amenities would you like to see this farm offer?

| | Would like | Would not want |
|---|---:|---:|
| Canning/Freezing supplies | 34% | 66% |
| Baked goods | 42% | 58% |
| Beverages | 52% | 48% |
| Pre-picked berries | 53% | 47% |
| Picnic area | 38% | 62% |
| Children's area | 38% | 62% |
| Handwashing area | 71% | 29% |

Question 21: How important are the following to your experience with a berry farm?

| | Not Important | Somewhat Important | Very Important | Essential |
|---|---:|---:|---:|---:|
| Convenient parking | 10% | 52% | 29% | 10% |
| Easy to find | 8% | 41% | 38% | 13% |
| Cleanliness of restrooms | 26% | 36% | 30% | 8% |
| Size of the berries picked | 7% | 35% | 44% | 14% |
| Price of berries | 4% | 39% | 45% | 12% |
| Ability to pay with a credit card | 52% | 29% | 14% | 5% |
| The farm allows children to pick | 28% | 19% | 27% | 26% |
| Availability of refreshments | 64% | 26% | 7% | 3% |
| Instructions for where/how to pick berries | 16% | 30% | 38% | 15% |
| Friendliness of farm staff | 2% | 12% | 55% | 31% |

Question 22: How would you rate your satisfaction with this farm in the following categories?

| | Very dissatisfied | Dissatisfied | Satisfied | Very satisfied |
|---|---|---|---|---|
| Size of berries picked | 2% | 4% | 55% | 39% |
| Quality of berries picked | 2% | 2% | 41% | 56% |
| Easy to find | 2% | 1% | 44% | 53% |
| Instructions for where/how to pick | 2% | 1% | 39% | 58% |
| Convenient parking | 2% | 0% | 40% | 58% |
| Availability of refreshments | 5% | 10% | 65% | 20% |
| Price of berries | 2% | 3% | 65% | 30% |
| Provided updated picking condition online or by telephone | 2% | 3% | 42% | 53% |
| Restroom facilities | 4% | 8% | 68% | 19% |
| Friendliness of farm staff | 2% | 1% | 24% | 72% |

Question 23: With regards to your visit to the farm this season, will you:

| I will not return next season and will recommend others to avoid this farm | I will not return next season | Undecided | I will return next season | I will return next season and will recommend others to visit this farm |
|---|---|---|---|---|
| 0% | 0% | 3% | 11% | 85% |

Question 24: Do you own a smartphone?

| | |
|---|---|
| Yes | 39% |
| No | 61% |

Question 25: How often do you use the following social media platforms?

| | I do not use | < 1 time/week | 1-3 times/week | 4-7 times/week | 2-3 times/day | 4-5 times/day | 5+ per day |
|---|---|---|---|---|---|---|---|
| Facebook | 38% | 10% | 10% | 14% | 14% | 5% | 9% |
| Twitter | 92% | 4% | 1% | 1% | 0% | 0% | 1% |
| LinkedIn | 82% | 13% | 4% | 1% | 0% | 0% | 0% |
| Pinterest | 74% | 11% | 6% | 5% | 2% | 0% | 1% |
| Other | 94% | 1% | 1% | 1% | 1% | 0% | 1% |

Question 26: Which category describes your age?

The average consumer age indicated is about 49 years old.

| | |
|---|---|
| Younger than 18 | 2% |
| 18 - 24 | 3% |
| 25 - 29 | 4% |
| 30-34 | 9% |
| 35-39 | 10% |
| 40-44 | 11% |
| 45-49 | 11% |
| 50-54 | 13% |
| 55-59 | 11% |
| 60-64 | 11% |
| 65-69 | 6% |
| 70 and over | 8% |
| No response | 1% |

Question 27: How would you describe your race?

| | |
|---|---|
| American Indian or Alaska Native | 2% |
| White | 99% |
| Black or African American | 0% |
| Asian (India) | 0% |
| Chinese | 0% |
| Korean | 0% |
| Japanese | 0% |
| Other Asian | 0% |
| Pacific Islander | 0% |
| Hispanic/Latino | 0% |
| Other | 1% |
| No response | 2% |

Question 28: Please mark all of the following that apply to you:

| | |
|---|---|
| Male | 19% |
| Female | 82% |
| Married/Long-term partner | 65% |
| Children at home (under the age of 18) | 33% |

Question 29: Which category best describes your annual household income?

| |
|---|
| The average annual household income equals $99,000. |

| | |
|---|---|
| Less than $10,000 | 3% |
| $10,000 to $14,999 | 1% |
| $15,000 to $24,999 | 2% |
| $25,000 to $34,999 | 5% |
| $35,000 to $49,999 | 11% |
| $50,000 to $74,999 | 20% |
| $75,000 to $99,999 | 18% |
| $100,000 to $149,999 | 13% |
| $150,000 to $199,999 | 5% |
| $200,000 or more | 2% |
| Prefer not to answer | 19% |
| No responses | 4% |

Key Findings

Visit behavior: The rate of visiting other farms has gone up from 15% to 41% indicating that berry pickers are traveling to more than one farm more often.

Location: 73 percent of first time pickers live less than 20 miles from the farm.

Spending: The average total purchase on berry and non-berry items combined is $31.68.

Comparison to 1998 Berry Customer Survey:

| **Survey Year** | **1998** | **2012** |
|---|---|---|
| New to Picking | 17% | 8% |
| Avg. Distance from Farm | 11 miles | 14 miles |
| Brought children | 50% | 39% |
| Visits to Farm per Season | 2.5 | 2 |

Gaining information:

| **Survey Year** | **1998** | **2012** |
|---|---|---|
| Sign/billboard | 63% | 13% |
| Recommendations | 57% | 16% |
| Newspaper ad | 65% | 11% |
| Flyers/mailings | 49% | 13% |
| Online search engine (Google) | N/A | 41% |
| Website | N/A | 36% |
| Minnesota Grown Directory | N/A | 20% |
| Social media | N/A | 7% |
| Online ad | N/A | 5% |

Influence: Consumers ranked attributes of the farm they found most important. The two most important factors indicated were location or closeness of berry patch and quality of fruit. One in four considered price as being most or second most important.

Extras: When consumers were asked what features they felt berry farms lacked, 71 percent showed an interest in hand washing facilities. Over half of those surveyed were interested in beverages and/or pre-picked berries.

Regular customers: Regular customers or individuals who have been to the farm at least four of the last five years are proven to visit 17 percent more often than a new customer and spend 31 percent more per visit. Regular customers tend to live close to the farm and place a high level of importance on quality.

New customers: 63 percent of first time visitors to the berry farm use Facebook at least once per day. They are social media savvy and about one in four uses Pinterest. Over half of the new customers indicate using an online search engine such as Google to find the farm. One in three used the farm website and one in four used the Minnesota Grown Directory online.

Recommendation: Word-of-mouth is powerful in contributing to new customer leads and repeat business. Of those surveyed, 96 percent said they would return to the farm and 86 percent of those said they would also recommend the farm to others. Results show that 28 percent of berry consumers received a recommendation to visit the farm.

Payment method:

| | **Actual payment method for locations accepting credit/debit** | **Actual payment method for locations not accepting credit/debit** |
|---|---|---|
| Credit/Debit card | 44% | |
| Cash | 18% | 47% |
| Check | 38% | 53% |

Berry to Berry: Strawberry customers make more non-berry purchases than other berry pickers. They are also more likely to pay with a check. Blueberry customers are more likely than other berry pickers to go to more than one farm and are more interested than others in using berries in recipes and to freeze. Finally, strawberry pickers value customer service above the price of the berry which is untrue of raspberry and blueberry pickers but also counts for the majority of people total.

New customers: New to picking customers have a higher income than experienced pickers. There is also less discrepancy between male and female and were more likely to have children and pick with children. These customers were also more likely to find the farm online.

Appendix

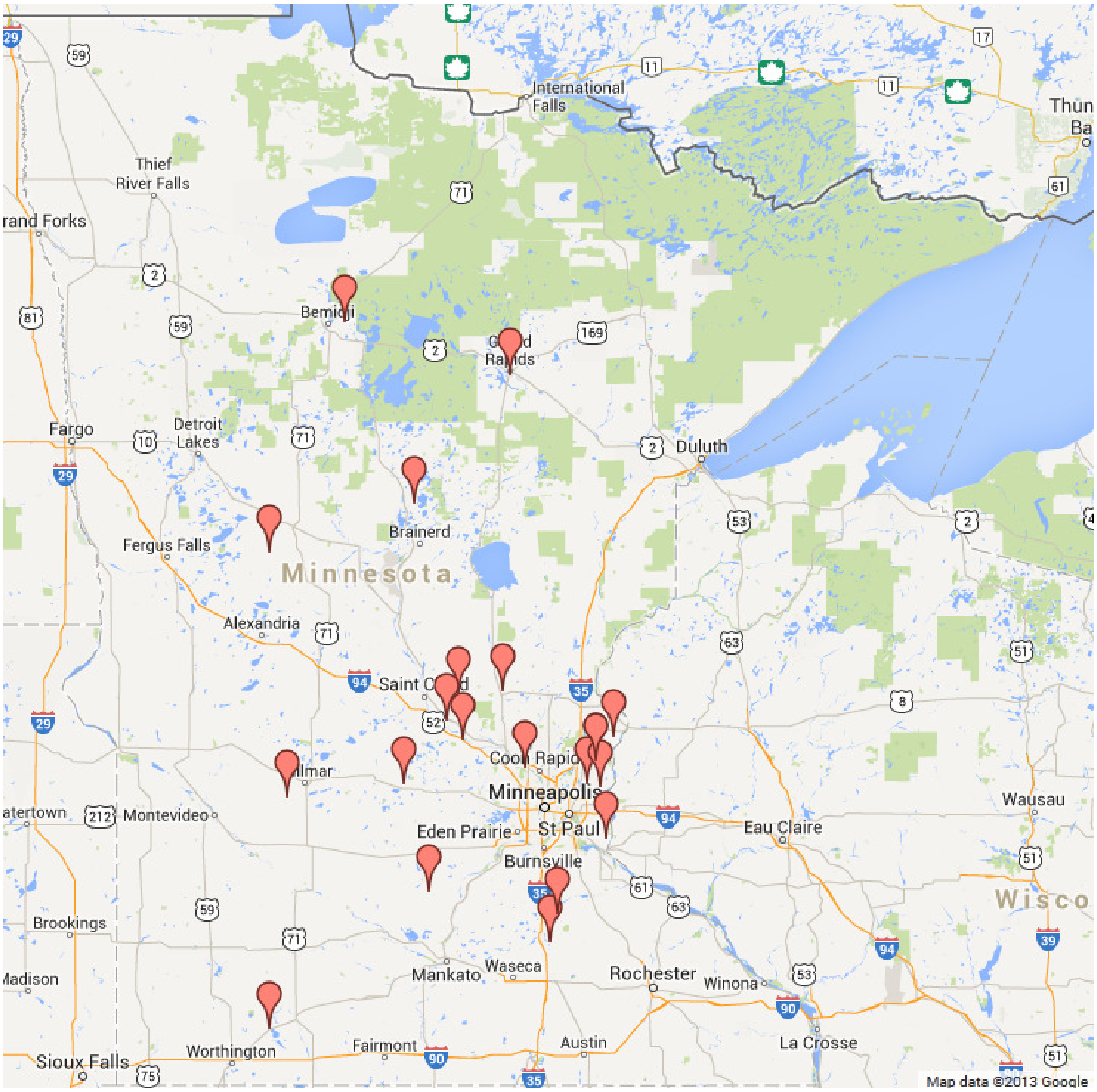



*Figure 1* Shown above are the 30 pick-your-own berry operations included in the 2012 survey.


*Figure 2* When consumers made a purchase they were given a postcard specific to the farm with information on how to take the survey online.

# 2012 Apple Orchard Consumer Survey

The Ag Marketing & Development Division of the Minnesota Department of Agriculture, in cooperation with the Minnesota Apple Growers Association (MAGA) and individual pick-your-own apple orchards surveyed consumers in 2012. State funds for this project were matched with Federal funds under the Federal-State Marketing Improvement Program of the Agricultural Marketing Service, U.S. Department of Agriculture. The objective was to identify demographic and purchasing patterns of current customers, as well as to obtain feedback from customers about services orchards provided. The MDA thanks the orchards for their assistance in the distribution and collection of the surveys.

<u>Methodology</u>

Apple orchards were recruited in 2012 through the Minnesota Grown member update, a bimonthly e-newsletter distributed to over 1,200 members. Further recruitment occurred at the MAGA and MFVGA (Minnesota Fruit and Vegetable Growers Association) annual meetings. A total of 18 apple orchards participated in the survey representing nine counties. An additional six orchards intended to participate but did not due to poor harvest and limited quantities of marketable fruit. The orchards that participated received a private copy of their farm's individual results to compare to aggregate data. The results collected were presented to the MAGA and MFVGA in 2013.

A total of 469 responses were generated despite a season that was heavily impacted by weather. Early blooming trees were damaged by a late hard frost reducing crop yield significantly. Orchards received flyers to present customers at check out, prompting them to follow the link to complete a short questionnaire. As incentive to complete the survey, participants had the option to include their name and email address to be entered for a prize of one 50 dollar gift certificate to the orchard they visited.

Results

Question 1: As an adult, how many years have you bought apples at an apple orchard, previous to this year?

| | |
|---|---|
| 0, this is my first year | 7% |
| 1 | 7% |
| 2 | 8% |
| 3 | 7% |
| 4 | 7% |
| 5 | 10% |
| 6 | 4% |
| 7 | 3% |
| 8 | 3% |
| 9 | 2% |
| 10 or more | 42% |

Question 2: In the previous five years, how many years have you bought apples at this orchard?

| | |
|---|---|
| 0, this is my first year at this orchard | 29% |
| 1 | 12% |
| 2 | 11% |
| 3 | 10% |
| 4 | 7% |
| 5 | 31% |

Question 3: Counting this visit, how many times do you intend to buy apples at this orchard this year?

| | |
|---|---|
| 1, this will likely be my only visit to this orchard this year | 43% |
| 2 | 20% |
| 3 | 18% |
| 4 | 6% |
| 5+ | 13% |

Question 4: How much did your household spend on fresh apples on this visit to this farm? (Do not count caramel apples, cider, etc...)

| |
|---|
| 91% of customers purchased apples. Those who purchased apples spent an average of $24.37. |

| | |
|---|---|
| We did not buy apples | 9% |
| $1-10 | 14% |
| $11-20 | 34% |
| $21-30 | 20% |
| $31-40 | 10% |
| $41-50 | 5% |
| $51-60 | 3% |
| $61-70 | 2% |
| $71-80 | 1% |
| More than $80 | 1% |
| Other | 0% |

Question 5: How much did your household spend on items other than fresh apples on this visit to this farm? (i.e. admission, pumpkins, flowers, cider, baked items, raspberries)

86% of customers purchased non-apple items. Those who purchased items such as cider or baked good spent an average of $20.62.

| | |
|---|---|
| We only bought apples | 14% |
| $1-10 | 27% |
| $11-20 | 25% |
| $21-30 | 17% |
| $31-40 | 8% |
| $41-50 | 5% |
| $51-60 | 2% |
| $61-70 | 1% |
| $71-80 | 0% |
| More than $80 | 1% |
| Other | 0% |

Question 6: If your household made purchases in addition to fresh apples, please check all that apply:

| | |
|---|---|
| Raspberries | 2% |
| Caramel apples | 24% |
| Pumpkins | 20% |
| Cider | 35% |
| Wagon rides | 15% |
| Squash | 8% |
| Corn maze | 6% |
| Baked goods | 50% |
| Admission | 13% |
| Flowers | 3% |
| Other | 42% |

Question 7: How did you pay for your purchase?
Question 8: How would you prefer to pay for your purchase?

| | How did you pay | How would you prefer to pay? |
|---|---|---|
| Cash | 39% | 28% |
| Credit Card | 46% | 60% |
| Check | 10% | 8% |
| Other | 5% | 4% |

Question 9: Did someone come with you to buy apples on this visit to the orchard? (Mark all that apply)

| | |
|---|---|
| No, I came by myself | 13% |
| Child/Children | 49% |
| Spouse/Partner | 51% |
| Other relative(s) | 20% |
| Friend(s) | 18% |

Question 10: How far was this apple orchard from your home?

Customers traveled an average of 19.5 miles to reach the orchard they visited.

| | |
|---|---|
| 0-4 miles | 8% |
| 5-9 miles | 18% |
| 10-14 miles | 15% |
| 15-19 miles | 14% |
| 20-24 miles | 14% |
| 25-29 miles | 8% |
| 30+ miles | 23% |

Question 11: What type(s) of apples did you buy on this trip to the orchard? (Mark all that apply)

| | |
|---|---|
| Cortland | 11% |
| Fireside | 3% |
| Haralson | 28% |
| Honeycrisp | 53% |
| McIntosh | 5% |
| Red Delicious | 1% |
| Regent | 3% |
| Sweet Sixteen | 3% |
| SweeTango | 12% |
| Zestar | 4% |
| I did not buy apples | 10% |
| Other | 16% |

Question 12: Given the choice, which type(s) of apples are you likely to buy?

| | Least Likely | Less Likely | Likely | Most Likely |
|---|---|---|---|---|
| Cortland | 29% | 33% | 27% | 11% |
| Fireside | 23% | 38% | 31% | 8% |
| Haralson | 14% | 23% | 33% | 29% |
| Honeycrisp | 1% | 5% | 21% | 73% |
| McIntosh | 28% | 35% | 28% | 9% |
| Red Delicious | 63% | 20% | 12% | 5% |
| Regent | 30% | 43% | 21% | 6% |
| Sweet Sixteen | 24% | 31% | 33% | 12% |
| SweeTango | 14% | 23% | 32% | 31% |
| Zestar | 20% | 26% | 36% | 18% |

Question 13: Why have you chosen to buy from this specific orchard? (Rank the following from 1-8. 1 Being the least important, 8 being the most important)

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|---|---|---|---|---|---|---|
| Convenient location | 19% | 10% | 9% | 8% | 10% | 10% | 12% | 22% |
| Quality of fruit | 5% | 8% | 6% | 8% | 11% | 18% | 24% | 21% |
| Good customer service | 3% | 7% | 11% | 13% | 18% | 17% | 18% | 13% |
| Specific variety of apple available | 7% | 12% | 12% | 17% | 18% | 18% | 9% | 7% |
| Activities (i.e. corn maze, hay ride) | 32% | 11% | 10% | 8% | 8% | 7% | 8% | 17% |
| Price of fruit | 8% | 13% | 21% | 21% | 12% | 11% | 8% | 6% |
| Growing practices of the orchard | 16% | 21% | 15% | 13% | 10% | 8% | 8% | 7% |
| Aesthetics of the orchard (scenic location, well manicured spaces/buildings) | 9% | 17% | 16% | 12% | 14% | 11% | 13% | 8% |

Question 14: Did any of the following provide you with information about this orchard, this year? (Mark all that apply)

| | |
|---|---|
| e-newsletter | 5% |
| Media story (TV, radio, newspaper) | 9% |
| Social media source (twitter, facebook, blog) | 8% |
| Sign/billboard | 20% |
| Flyer or other direct mailing from the farm | 5% |
| Recommendation | 23% |
| Online search engine (google, bing, Yahoo) | 16% |
| Minnesota Grown directory (online) | 6% |
| Minnessota Grown directory (printed) | 4% |
| Coupon/Other special offer | 5% |
| Farm website | 20% |
| Radio Ad | 1% |
| Newspaper Ad | 6% |
| Other | 21% |

Question 15: How would you rate your satisfaction with this farm in the following categories?

| | Not Applicable | Very Dissatisfied | Somewhat dissatisfied | Satisfied | Very satisfied |
|---|---|---|---|---|---|
| Convenient parking | 0% | 0% | 2% | 41% | 57% |
| Easy to find | 0% | 0% | 3% | 36% | 61% |
| Cleanliness of restrooms | 61% | 2% | 5% | 19% | 13% |
| Activities (i.e., corn maze, hay ride) | 40% | 1% | 5% | 33% | 21% |
| Variety of apples | 1% | 2% | 8% | 43% | 46% |
| Ability to pay with a credit card | 24% | 1% | 3% | 21% | 51% |
| Availability of prepared food to purchase (for consumption on site) | 22% | 1% | 7% | 36% | 35% |
| Availability of packaged food (cider, baked goods) | 10% | 1% | 5% | 40% | 44% |
| Quality of fruit | 1% | 0% | 3% | 32% | 63% |
| Helpfulness of farm staff | 2% | 0% | 2% | 26% | 69% |

Question 16: How important are the following to your satisfaction with an apple orchard?

| | Unimportant | Somewhat unimportant | Important | Very important |
|---|---|---|---|---|
| Convenient parking | 4% | 17% | 52% | 27% |
| Easy to find | 1% | 15% | 56% | 28% |
| Cleanliness of restrooms | 10% | 21% | 46% | 23% |
| Activities (i.e., corn maze, hay ride) | 27% | 25% | 26% | 22% |
| Quality of fruit | 0% | 0% | 24% | 75% |
| Variety of fruit | 1% | 5% | 41% | 54% |
| Availability of prepared food to purchase (for consumption on site) | 15% | 29% | 39% | 17% |
| Availability of packaged food (cider, baked goods) | 8% | 24% | 43% | 25% |
| Ability to pay with a credit card | 8% | 17% | 38% | 36% |
| Friendliness of farm staff | 1% | 2% | 37% | 59% |

Question 17: With regards to your visit to the farm this season, will you:

| I will not return next season and will suggest others avoid this orchard | I will not return next season | Undecided | I will return next season | I will return next season and will suggests that others visit this orchard |
|---|---|---|---|---|
| 0% | 2% | 7% | 11% | 80% |

Question 18: Do you own a smartphone?

| | |
|---|---|
| Yes | 54% |
| No | 42% |

Question 19: How often do you use the following social media platforms?

| | I do not use | Less than 1 time per week | 1-2 times per week | 4-7 times per week | 2-3 times per day | 4-5 times per day | More than 5 times per day |
|---|---|---|---|---|---|---|---|
| Facebook | 22% | 13% | 11% | 17% | 14% | 9% | 13% |
| Twitter | 84% | 6% | 4% | 2% | 1% | 0% | 1% |
| LinkedIn | 67% | 21% | 9% | 1% | 1% | 0% | 0% |
| Pinterest | 63% | 18% | 9% | 6% | 4% | 0% | 0% |
| Other | 91% | 3% | 1% | 3% | 0% | 0% | 1% |

Question 20: Which category describes your age?

| |
|---|
| The average age of all customers was 46.8 years old. |

| | |
|---|---|
| Younger than 18 | 0% |
| 18-24 | 5% |
| 25-29 | 6% |
| 30-34 | 15% |
| 35-39 | 11% |
| 40-44 | 11% |
| 45-49 | 9% |
| 50-54 | 12% |
| 55-59 | 11% |
| 60-64 | 9% |
| 65-69 | 6% |
| 70 and over | 5% |

Question 21: What is your gender?

| | |
|---|---|
| Male | 20% |
| Female | 80% |

Question 22: How many children under the age of 18 do you have at home?

| | |
|---|---|
| 0 | 52% |
| 1 | 20% |
| 2 | 25% |
| 3 | 10% |
| 4 | 1% |
| 5 | 0% |
| 6 or more | 0% |

Question 23: If you have children under the age of 18, which age groups do they belong to? (Mark all that apply)

| | |
|---|---|
| 0-4 years old | 47% |
| 5-9 years old | 41% |
| 10-14 years old | 31% |
| 15-18 years old | 27% |

Question 24: Which category best describes your annual household income?

The average annual household income of all apple customers was $87,500.

| | |
|---|---|
| Less than $10,000 | 1% |
| $10,000 to $14,999 | 1% |
| $15,000 to $24,999 | 3% |
| $25,000 to $34,999 | 6% |
| $35,000 to $49,999 | 10% |
| $50,000 to $74,999 | 18% |
| $75,000 to $99,999 | 15% |
| $100,000 to $149,999 | 12% |
| $150,000 to $199,999 | 6% |
| $200,000 or more | 3% |
| Prefer not to answer | 24% |
| No Responses | 4% |

Key Findings

New Customers: While seven percent of the total responses came from individuals who indicated they had never picked apples before, an additional 16 percent selected they were new to the orchard. This indicates that over one quarter of all customers were unfamiliar with the processes of the orchard including picking guidelines and payment options.

Recommendation: The overwhelming majority of consumers said they would return to the orchard in the future, a total of 91 percent. Almost all of these, 80 percent, said they would also recommend the orchard to others to visit. The power of recommendation is shown by question 14 which indicates that 23 percent of customers, almost one quarter of the total, were influenced to visit the orchard by a recommendation. This has a potential domino effect to bring in additional customers. In fact, 49 percent of new customers came to the orchard based on a recommendation.

Attendance: Over half of all customers visit two or more times per season. Almost one quarter travel at least 30 miles to visit the orchard. Regular customers who have been the orchard in the past and visit more than one time per year spend 11 percent more per visit and 50 percent more per season on average. Regular customers gain information by visiting the farm website. Just over half of all customers visited the orchard with their spouse or partner. Slightly less than that came with their children, suggesting that orchards are viewed by customers as a family experience.

Demographics: Apple orchard customers were last surveyed by the Minnesota Department of Agriculture in 1998. Demographics remained similar over the 14 year gap.

| **Survey Year** | **1998** | **2012** |
|---|---|---|
| New Customers | 38% | 36% |
| Female | 77% | 80% |
| With children | 55% | 49% |
| Avg. Age | 43 | 46 |
| Avg. Household Income | $89,000 | $83,000 |

Information Gathering: Customers gain information about the orchard in new ways.

| **Survey Year** | **1998** | **2012** |
|---|---|---|
| Sign/Billboard | 53% | 20% |
| Recommendations | 47% | 23% |
| Newspaper ad | 36% | 6% |
| Website | N/A | 20% |
| Online search engine (Google) | N/A | 16% |
| Social media | N/A | 8% |
| Minnesota Grown Online | N/A | 6% |

Spending: The average total spending per customer on apple and non-apple items is $38.75 per visit. Fresh apples make up 56 percent of sales while items and services other than apples account for the other 44 percent. Individuals who paid with cash spend an average of $31. Customers who paid with a credit or debit card spent an average of $43 and were more likely to buy additional non-apple items. Customers in the metro area are more likely to purchase cider while out state customers have a higher purchase of wagon rides. Regular customers are also more likely than others to purchase baked goods, the most popular non-apple item.

| | Preferred payment method | Actual payment at locations that accept credit cards | Actual payment at locations that do not accept credit cards |
|---|---|---|---|
| Credit/debit card | 60% | 58% | N/A |
| Cash | 28% | 36% | 65% |
| Check | 8% | 6% | 35% |

Variety: Honeycrisp is the most sought after apple variety, with 94 percent of customers saying they are either likely or most likely to buy that variety. SweeTango and Haralson place second and third in demand.

Social Media: Half of orchard customers said they own a smartphone and 36 percent visit Facebook at least two times per day. Of all customers under the age of 40, 90 percent use Facebook. Two thirds of returning customers and 84 percent of new customers also use Facebook. The second most commonly used social media platform is Pinterest, with 41 percent of new customer reporting they use the site. Over half of the customers report owning a smartphone.

Appendix

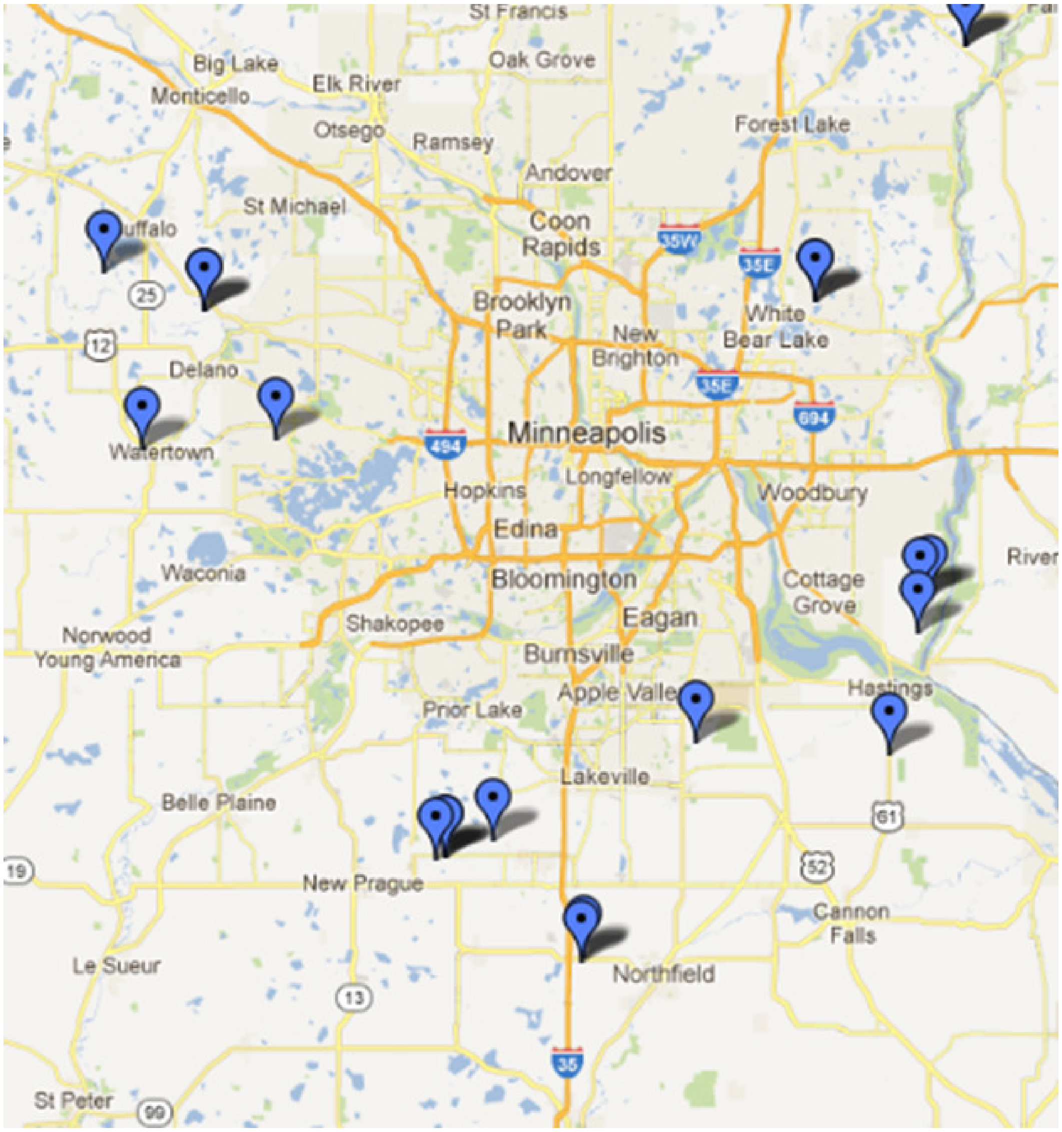



*Figure 1* The map illustrates the 18 apple orchards that contributed results to the 2012 survey.


*Figure 2* When a customer made a purchase they were given a postcard like this with a shortened URL and QR code unique to the orchard they visited. Further instructions were provided for how to complete the survey online.