U-Pick Farms in the Greater Rochester Area
2020 Customer Survey

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Executive Summary

As the concept of agritourism has been prominent worldwide, larger numbers of people have begun to participate in this movement as both operators and consumers. "U-Pick farms," which are the most common form of agritourism, are commercial agricultural operations where members of the public can harvest their own fruits and vegetables. Visitors pay not only for the harvest, which is often cheaper than market price, but for the experience of participating in an agricultural operation. For a commercial U-Pick operation (also known as choose-your-own or cut-your-own), which is also a piece of the tourism infrastructure in a given community, customer satisfaction is highly important. The purpose of this project is to gauge customer satisfaction at four U-Pick farms featuring fruit in the vicinity of Monroe County, New York and examine factors related to purchasing behavior in cooperation with the Monroe County Cooperative Extension Agritourism program.

Key findings:

- A total of 222 surveys were collected at four local farms providing U-Pick services for customers from July to August of 2020.
- Respondents were mostly female (72.3%), Caucasian (88.2%), and residents of Monroe County, NY (83.6%).
- Other demographic characteristics from respondents include their average age (50.22 years-old) and having a graduate or professional degree (44.9%).
- Respondents identified the most important characteristics of a U-Pick farm as *quality of the fruit* (m= 4.59, measured on a 5-point scale), *taste of the fruit* (m= 4.55), and *helpfulness of staff* (m= 4.10).
- Respondents perceived that farms performed best in terms of *friendliness of staff* (m= 4.78, measured on a 5-point scale), *ease of checkout process* (m= 4.75), and *helpfulness of staff* (m= 4.74).
- Importance-performance analysis highlighted *availability of desired fruit variety* and *price* as characteristics farm operations should prioritize moving forward.
- Results suggest that farmers should improve perceptions of availability of specific/preferred varieties of fruit by (a) competitively pricing specific highly desirable varieties, and (b) more effectively communicating what is currently available and when

specific varieties will be available through social media, the farm website, and other important sources of information.

- Respondents reported the most important motivations for visiting were *to purchase fresh produce* (m= 4.8, measured on a 5-point scale), *to do something fun* (m= 4.54), and *to support local agriculture* (m= 4.51).

- Respondents reported that *supporting local farmers* (m= 4.63, measured on a 5-point scale), *providing safe recreation during the pandemic* (m=4.62), *supporting the local food system* (m= 4.54), and *encouraging environmentally friendly attitudes* (m= 4.54) were the most importance community contributions of U-Pick farms.

Introduction

This report was written from the aggerated data collected from four U-Pick farms in the vicinity of Monroe Country, NY, from July to August of 2020. A total of 222 surveys were collected onsite at the participating farms. Data analysis was completed by the research team using IBM SPSS and Microsoft Excel. This project was approved by the Institutional Review Board at SUNY Brockport.

Aggregate results from all participating farms are presented below for the following categories: respondents' profiles, customer experiences, perceived community contribution, motivation, and new environmental paradigm.

Results

Respondent Profile

Respondents (n = 222) were overwhelmingly female (72.3%), Caucasian (88.2%), and residents of Monroe County, NY (83.6%). The average age was 50.22 years old with the largest age group being 51-65 years old (27.2%), followed by 36-50 years old (25.2%). The majority of respondents held graduate or professional degrees (44.9%), and identified as adult(s) over the age of 55 with no dependents (35.9%). The largest group of respondents reported household income between $40,000 to $60,000 (23.5%), followed by $80,000 to $100,000 (20.6%) (See Table 1).

Table 1 Respondent Demographic Characteristics

Demographic characteristic	n	% or Mean
Sex/Gender		
Female	146	72.3
Male	51	25.2
Prefer not to say/other	5	2.5
Age (in years)		50.22 years
18-35	45	22.3
36-50	51	25.2
51-65	56	27.7
66 or older	39	19.3
Missing*	11	5.4
Highest level of education		
Some high school	0	0
High school diploma or GED	11	5.6
Some college or Associate's degree	32	16.2
Bachelor's degree	64	32.3
Graduate or professional degree	89	44.9
Don't know/prefer not to disclose	2	1.4
Income		
$40,000 or less	11	8
$40,001 to $60,000	32	23.5
$60,001 to $80,000	13	9.5
$80,001 to $100,000	28	20.6
$100,001 to $120,000	18	13.2
$120,001 to $140,000	11	8
$140,001 to $160,000	6	4.4
$160,001 to $180,000	2	1.4
$180,001 or more	13	9.5
Don't know/prefer not to disclose*	86	
Residence		
Resident of Monroe County	158	83.6
Non-resident of Monroe County	31	16.4
Race/Ethnicity (choose all that apply)		
American Indian or Alaskan Native	0	0
Asian	12	6.4
Black or African American	1	.5
Hispanic/Latino9	5	2.6
Native Hawaiian or Pacific Islander	0	0
White	165	88.2
Refuse/other/don't know	9	4.8
Missing*	10	4.9
Family status		
Single-parent household with dependent child/children	11	5.6
Two-parent household with dependent child/children, one wage earner	56	14.1
Two-parent household with dependent child/children, two wage earners	28	28.3
Adult(s) 54 and under with no dependents	15	7.6
Adult(s) 55+ with no dependents	71	35.9
None of the above/prefer not to disclose	17	8.6

* Does not count towards total or percentage values.

The most common source of information for U-Pick farm visitors was word of mouth (28.4%), and the largest group of respondents visited the farm with their children (31.5%) (See Table 2). The average number of people in a group was 2.6. Spending by the respondents ranged from $3 to $150 with an average of $19.90.

Table 2 Visit Behavior

Visit Behavior	*n*	*% or mean*
Source of information		
News	0	0
Radio	1	0.4
Internet Search	57	20.7
Social Media	32	11.6
Newspaper	6	2.2
Farm Website	30	10.9
Word of Mouth	78	28.4
Drive by	43	15.6
Others[a]	28	10.2
Visit companion		
Friends	25	9.8
Neighbors	3	1.2
Children	80	31.5
Parents	26	10.2
Spouse	64	25.2
Co-worker	3	1.2
Alone	42	16.5
Others[b]	11	4.3

a: Others responses includes living in the neighborhood.

b: Others responses includes grandchildren.

Customer Experiences

In this section, respondents were asked to evaluate their experiences at the U-Pick farm and rate the importance of various experiences at, or characteristics of, the U-Pick farm. Eighteen items were evaluated, *including taste of fruit, availability of desired fruit variety, quality of the fruit, price, forms of payment accepted, information upon entry, cleanliness of the farm, helpfulness of staff, ease of checkout process, friendliness of staff, ease of parking, ease of finding the farm, location of the farm, information to plan the visit, restroom onsite, food or drink for purchase, handicap accessibility,* and *pandemic-related safety measures.*

Importance was rated on a scale from 1 (Not at all important) to 5 (Extremely important). The most important services were reported as *quality of the fruit* (m= 4.59), *taste of the fruit* (m= 4.55), and *helpfulness of staff* (m= 4.10) (See Table 3).

Table 3 Service/Characteristic Importance

Items	Not at all important (%)	A little important (%)	Moderately important (%)	Important (%)	Extremely important (%)	Mean
Quality of U-Pick fruit	1.4	0.9	6.3	23.1	69.2	4.59
Taste of U-Pick fruit	1.4	0.9	8.8	19	69.9	4.55
Helpfulness of staff	1.8	3.6	20	30	44.5	4.12
Friendliness of staff	1.8	3.2	20.8	31.7	42.5	4.1
Ease of checkout process	1.8	3.2	21.7	33	40.3	4.07
Cleanliness of farm	2.3	6.3	21.3	27.1	43	4.02
Availability of desired friut variety	1.4	0.9	21.7	25.3	42.4	3.95
Ease of parking	2.3	5	27.7	27.3	37.7	3.93
Pandemic related safety measures	7.3	9.1	17.3	17.3	49.1	3.92
Ease of finding the farm	3.7	9.1	25.1	31.1	31.1	3.77
Price of U-Pick fruit	1.4	8.3	34.4	25.2	28.4	3.67
Information to plan your visit	5.5	10.6	27.2	25.8	30.9	3.66
Location of farm	3.7	7.8	36.9	24.9	26.7	3.63
Information upon entry	6.8	11.3	36	21.6	24.3	3.45
Restroom onsite	16	20.2	28.2	15	20.7	3.07
Forms of payment accepted	21.9	11.9	31.1	17.8	17.4	2.97
Handicap accessibility	28.7	17.6	18.1	14.4	21.3	2.82
Food or drink for purchase	47.5	29.5	12.4	3.2	7.4	1.94

The quality of the same experiences/characteristics was also rated by the visitors on a scale from 1 (Very poor) to 5 (Exceptional), with an additional option of N/A (Not available) to capture visitors who did not experience certain services, or for services not present on the selected farm. The highest-quality items were *friendliness of staff* (m= 4.78), *ease of checkout process* (m= 4.75), and *helpfulness of staff* (m= 4.74) (See Table 4).

Table 4 Service/Characteristic Quality

Items	Very poor (%)	Poor (%)	Moderate (%)	Good (%)	Exceptional (%)	N/A *	Mean
Friendliness of staff	0	0	3.3	15.5	81.2	2.7	4.78
Ease of checkout process	0	0	3.8	17.8	78.4	2.7	4.75
Helpfulness of staff	0	0	3.7	18.7	77.6	1.8	4.74
Ease of parking	0	0.5	5.6	15	79	2.3	4.72
Taste of U-Pick fruit	0	0	4.1	23.9	72.1	8.6	4.68
Quality of U-Pick fruit	0	0	2.4	26.4	71.2	2.7	4.67
Ease of finding the farm	0	0.5	4.7	21.8	73	3.2	4.67
Cleanliness of farm	0	0	8.9	27.2	63.8	2.3	4.55
Location of farm	0	0.5	9	27	63.5	3.2	4.54
Pandemic related safety measures	0.5	1.5	8.4	25.7	63.9	6.31	4.51
Information to plan your visit	0	1	19.5	24	55.5	7.2	4.34
Availability of desired berry variety	1	0.5	17.2	26.6	54.7	6.8	4.33
Information upon entry	0	1.4	20	30.7	47.9	1.8	4.25
Price of U-Pick fruit	0	1.4	21.5	31.6	45.5	2.7	4.21
Forms of payment accepted	1.5	4.4	31.5	27.6	35	6.3	3.9
Restroom onsite	7.1	12.7	21.4	19.8	38.9	40.1	3.71
Handicap accessibility	8	8	29	18	37	49.6	3.68
Food or drink for purchase	11.5	13.5	30.2	17.7	27.1	51.8	3.35

 * Does not count towards total or percentage values.

Importance-Performance Analysis

Importance-performance analysis (IPA) is a simple method of evaluating and improving service quality through the use of survey data[1]. In short, it allows service providers to identify things that users find important, but which are not delivered at a sufficient level of quality. Importance and

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[1] Martilla & James, 1977

performance ratings from Table 3 and Table 4 are used to visually plot the survey data in an IPA matrix, a two-dimensional graph, divided into four quadrants (Figure 1).

Attributes that are higher-than average in both importance and performance are viewed as low urgency in terms needing the investment of additional organization resources, categorized as *keep up the good work* (Quadrant I). Attributes lower-than average in importance and higher-than average in performance are categorized as *possible overkill*, indicating that current levels of investment may be more than necessary (Quadrant II). Attributes lower-than average in both importance and performance are seen as *low priority* overall and thus have low urgency for the investment of organizational resources (Quadrant III). Finally, those attributes that are higher-than average in importance but lower-than average in performance are categorized as *concentrate here*, potential focal points for action and resource allocation (Quadrant IV)[2].

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[2] Pitas, Agate, & Brott, 2020

Figure 1 Example Importance-Performance Matrix[3]

Results indicate that a majority of the services/attributes fell into Quadrant I: keep up the good work (See Figures 2 and 3). Services/attributes in this quadrant are seen as both higher-than average importance and higher-than average performance, meaning that organizations should ensure that they maintain the current high levels of performance in these services/attributes, but should carefully consider allocating additional resources to them.

Several items fell into Quadrant III (low priority) with lower-than average performance and lower-than average importance, such as bathrooms onsite, the ability to use various payment methods, handicap accessibility, and onsite food and drink/concession stand. As areas of "possible overkill," a general recommendation may be to avoid allocating additional resources (e.g. time, money, staff) to these services/attributes. A necessary caveat may be the allocation of resources to achieve/maintain compliance with accessibility-related laws and regulations.

Availability of desired fruit variety, information to plan the visit, and price of produce fell into Quadrant IV (concentrate here), with lower-than average performance and higher-than average importance. Visitors clearly feel that the availability of specific/preferred varieties of fruit is a high priority for their satisfaction, and attributed lower-than average quality to this attribute. Although the availability of certain varieties of fruit is largely beyond the control of individual farms (accounting for variables such as weather, climate, seasonality, etc.), there are potential actions operators may take to improve this area of operation. Nevertheless, farms do have direct control over both *price* and *availability of information to plan the visit,* and could potentially also improve perceptions of availability of specific/preferred varieties of fruit by (a) competitively pricing specific highly desirable varieties, and (b) more effectively communicating what is currently available and when specific varieties will be available.

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[3] Adapted from Martilla and James, 1977, p. 78.

For example, farms could address the *availability of desired fruit* by more effectively communicating with visitors—such as via their website, social media, answering machine recording, and signage—about what is available/not available to avoid disappointment when visitors arrive. Several comments from visitors at multiple farms suggested that they had arrived under the impression that a specific type of fruit would be available, only to find it had already passed its season or had been picked over.

Similarly, external communication with the customer regarding information to *plan a visit* is critical. Since a large percentage of customers found the farms by internet search, it is essential to ensure farm information is accessible online across multiple platforms, such as search engines, farm websites, and social media platforms. Consistency across multiple platforms is also critical, as information that exists in multiple places may be more prone to inadvertent errors.

Regarding *price*, various pricing strategies could be considered, such as bulk discounts, differential pricing (e.g., early bird, kids special pricing), or competition-based pricing.
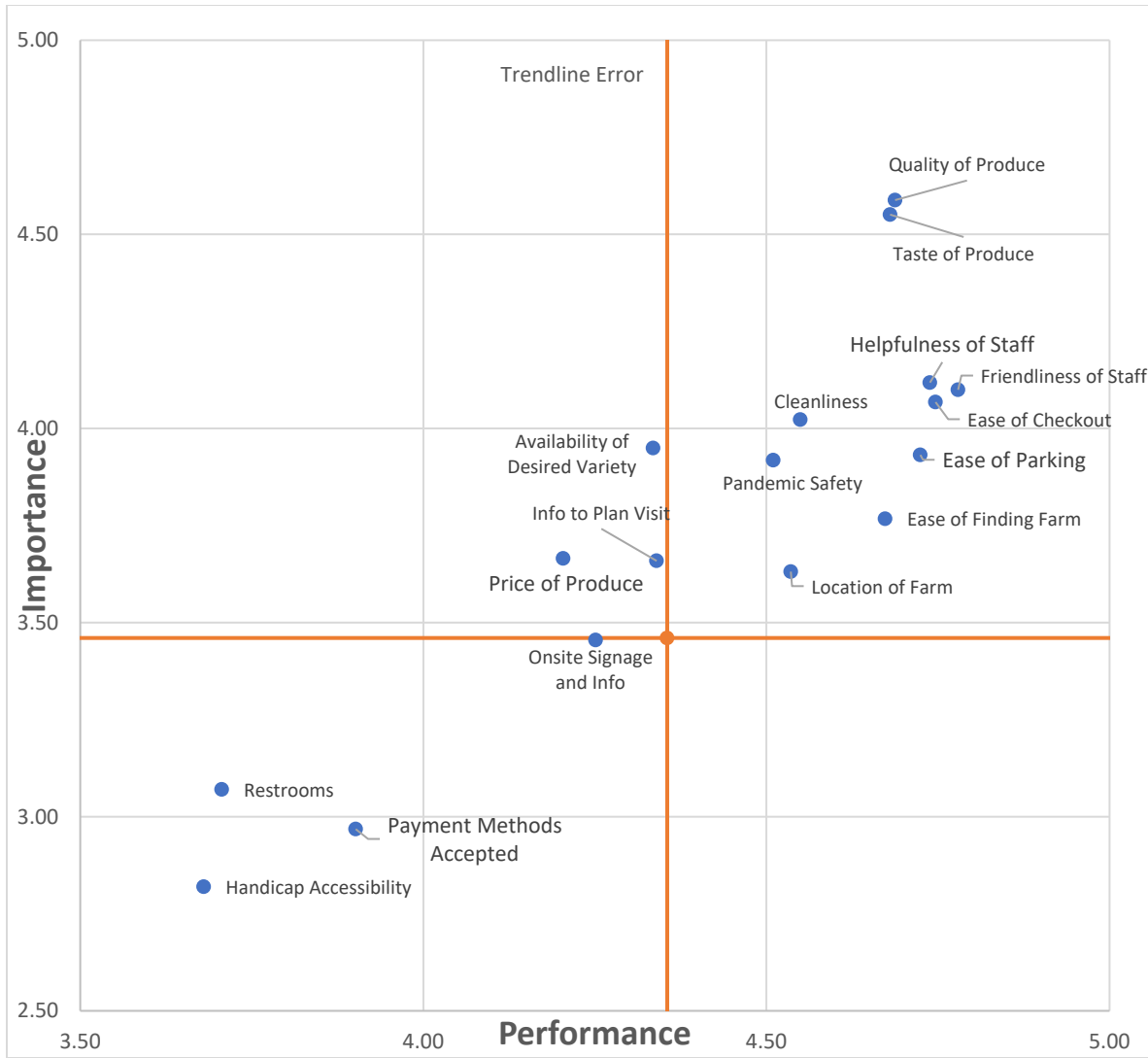
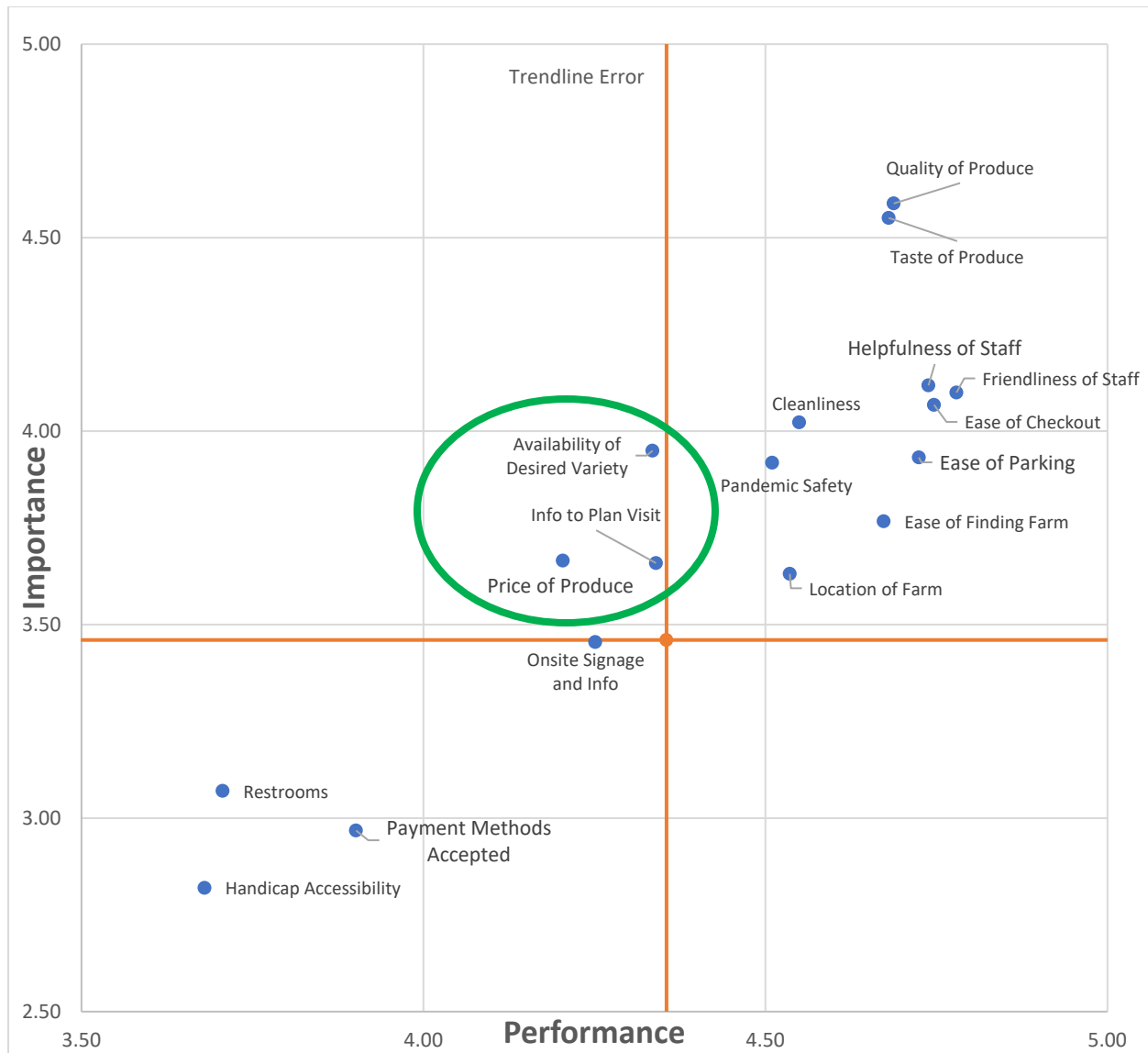*Figure 2 Importance-Performance Matrix*

Figure 3 Detail of Importance-Performance Matrix with Priorities Circled

Motivation to Visit

Visitor motivation is an important factor to consider in terms of farm marketing efforts. Potential motivations for visiting were measured on a scale from 1 (Not at all important) to 5 (Extremely important) (see Table 5). Respondents reported the most important motivation to visit a U-Pick farm is *to purchase fresh produce* (m= 4.8), followed by *to do something fun* (m= 4.54), and *to support local agriculture* (m= 4.51). It is noteworthy that respondents were also motivated *to do something safe during the pandemic* (m= 4.47).

These results indicate that U-Pick operators may wish to market their operations in a variety of ways. Messages that focus on the role that U-Pick farms play as sources of fresh produce, as places to have fun, and as safe contexts for family activities may be particularly effective. These messages are not mutually exclusive, and operators may wish to capture these various roles in a single message. Marketing efforts may also want to take into account the visitor profile described earlier (wherein a large proportion of visitors were older, highly educated, affluent, and visiting with younger children), and the most common sources of information cited by respondents (i.e. internet, social media, word-of-mouth, and drive-by signage).

Table 5 Motivations to Visit U-Pick Farms

Items	Not at all important (%)	A little important (%)	Moderately important (%)	Important (%)	Extremely important (%)	Mean
To purchase fresh produce	0	0.5	2	16.5	81	4.8
To do something fun	0.5	1	7.1	27.3	64.1	4.54
To support local agriculture	0.5	0	11.5	24.5	63.5	4.51
To do something safe during the pandemic	3	2.5	6.5	20.6	67.3	4.47
To enjoy time in nature	0.5	4	12.1	22.1	61.3	4.41
To take part in a sustainable activity	1.1	3.3	12.2	24.3	59.1	4.4
To do something with family and/or friends	3	2.5	13.1	25.8	55.6	4.28
To enjoy rural scenery	3.1	6.6	22.4	20.4	47.4	4.04
To learn more about agriculture	9.7	15.9	33.3	14.4	26.7	3.36

Perceived Community Contribution

This final section describes the contributions that visitors believe U-Pick farms make in their local community. Respondents reported that U-Pick farms make the biggest contribution *to supporting local farmers* (m= 4.63), followed by *providing safe recreation during the pandemic* (m=4.62). *Supporting the local food system* (m= 4.54) and *encouraging environmentally-friendly attitudes* (m= 4.54) were ranked third from the customers' viewpoint (See Table 6).

Since supporting local farmers is identified by customers as the most significant contribution of U-Pick farms, this might be an indicator to encourage farmers to involve customers for year-round activities or events outside of the traditional U-pick season, such as farmer's markets, community-supported agriculture (CSA) operations, or food preparation and preservation workshops. As for the second highest item, providing safe recreation during the pandemic, it is vital to provide the community with a safe recreation opportunity in the upcoming "new normal" era. Lastly, U-Pick farmers could position their operations as sustainable local agriculture practices to attract more "eco-centric" customers for future marketing strategies. For example, the farms could partner with local pro-environment or outdoor enthusiast groups to expand the market, or position their operations as a sustainable alternative to traditional grocery stores.

Table 6 Contributions of local U-Pick Farms

Items	*Very Small (%)*	*Small (%)*	*Medium (%)*	*Large (%)*	*Very Large (%)*	*Mean*
Supporting local farmers	0	0	6.6	24	69.4	4.63
Providing safe recreation during the pandemic	0.5	0.5	6.5	21.6	70.9	4.61
Promoting local food systems	0	1	9.2	25.1	64.6	4.54
Encouraging environmentally friendly attitudes	0	0.5	9.1	26.9	63.5	4.54
Contributing to community sustainability	0.5	0.5	12.8	28.1	58.2	4.43
Attracting tourists to the county	1.6	5.2	32.8	27.6	32.8	3.88

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