second harvest HEARTLAND

Client Insights Research Initiative

Understanding Needs, Barriers and Preferences Related to Produce Selection

Key Takeaway

We have an opportunity to grow the amount of produce clients take from food shelves

- 60% are sourcing half or more of their produce needs from the food shelf
- Increasing the take-rate of clients will increase both the health and financial security of clients

Top Barriers

1 **Accessibility**

- 84% wish they could get produce more often
- 1 in 5 take public transportation or walk to the food shelf

2 **Freshness**

- 85% prefer fresh produce over frozen or canned
- Lack of Freshness is the top reason for not taking produce

3 **Variety**

- Over 70% wish there were more choices offered

Myth Busters

Preferences

- While they want variety, client's top produce choices are largely similar across demographic groups

Education

- Clients understand that produce is a nutritious choice: the #1 reason for selecting produce is nutrition

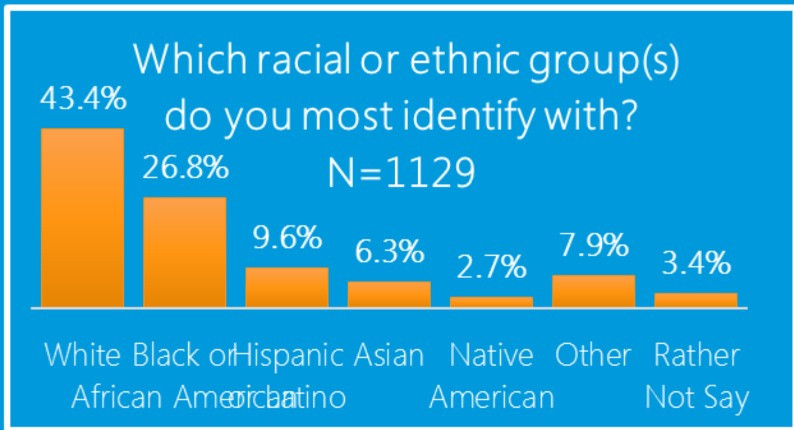
Response Planning Imperatives

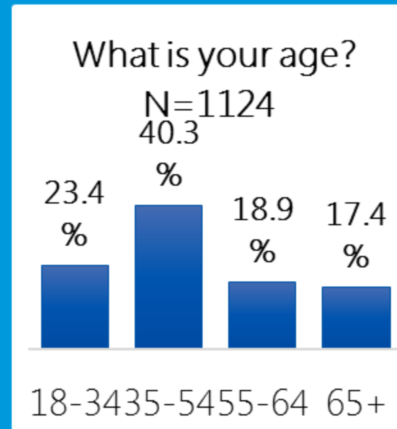
- Increase **accessibility** through increasing frequency of access
- Increase **freshness** through:
  - ✓ Shortening the supply chain
  - ✓ Explore new routes to market, farming 2nds, imperfects, etc.
  - ✓ Better culling

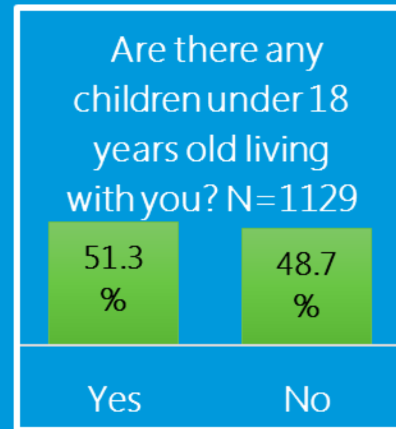
Respondent Demographics Overview

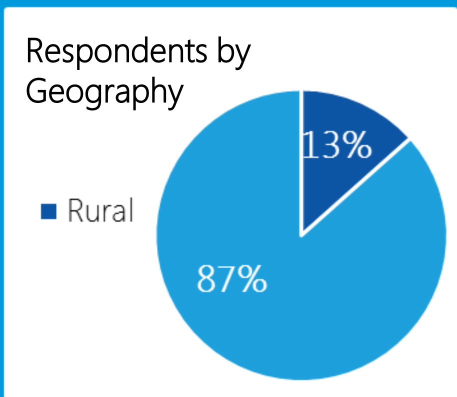
1,357

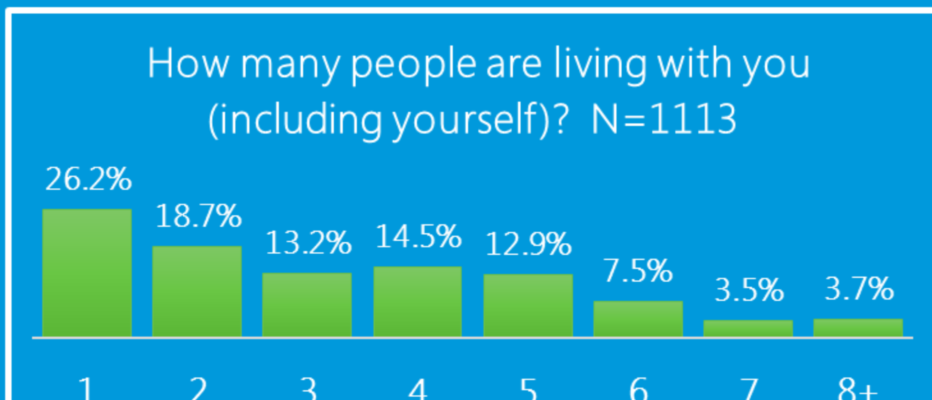
Survey Respondents

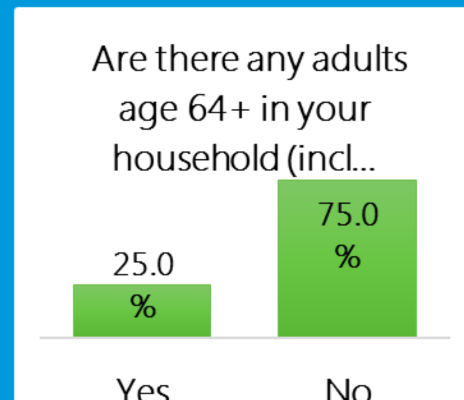




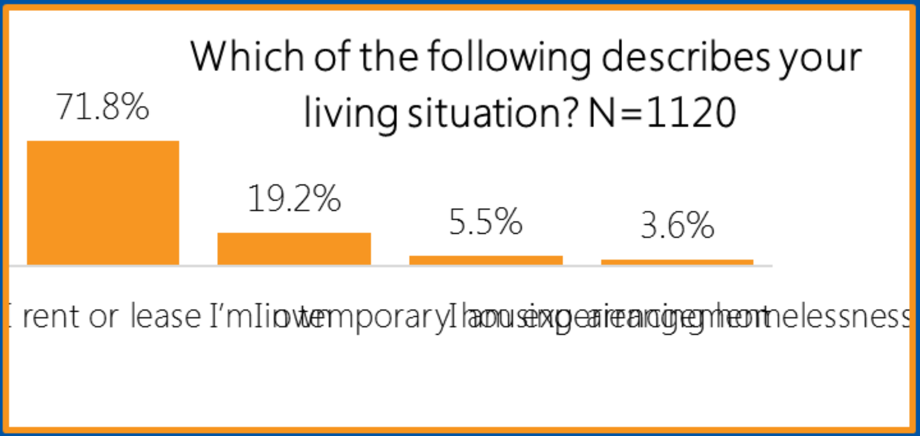


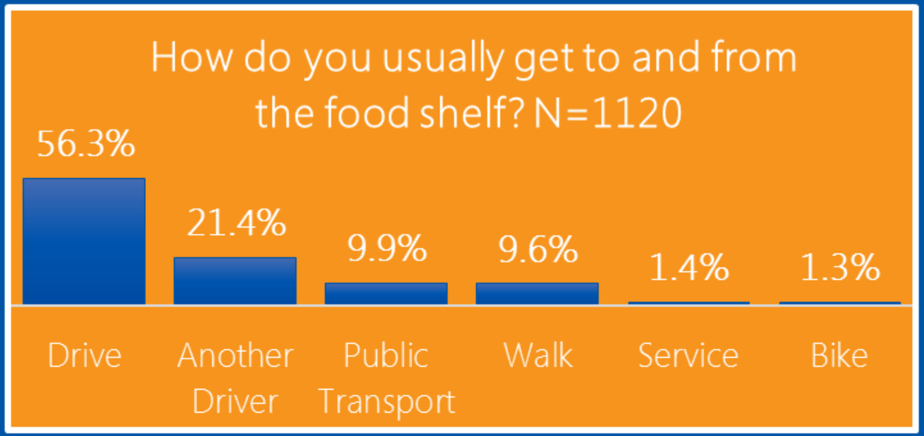


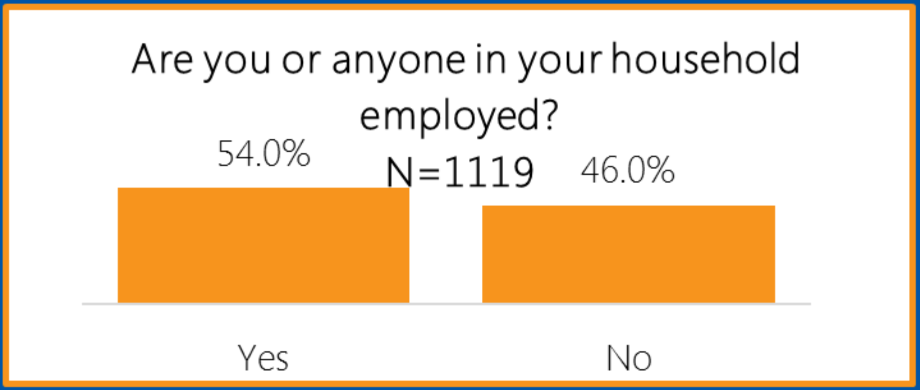


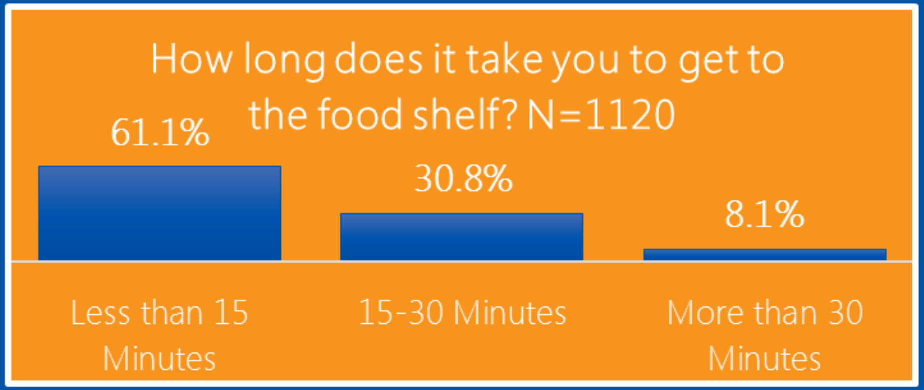


Most respondents have a stable living situation and live within 15 minutes of their food shelf



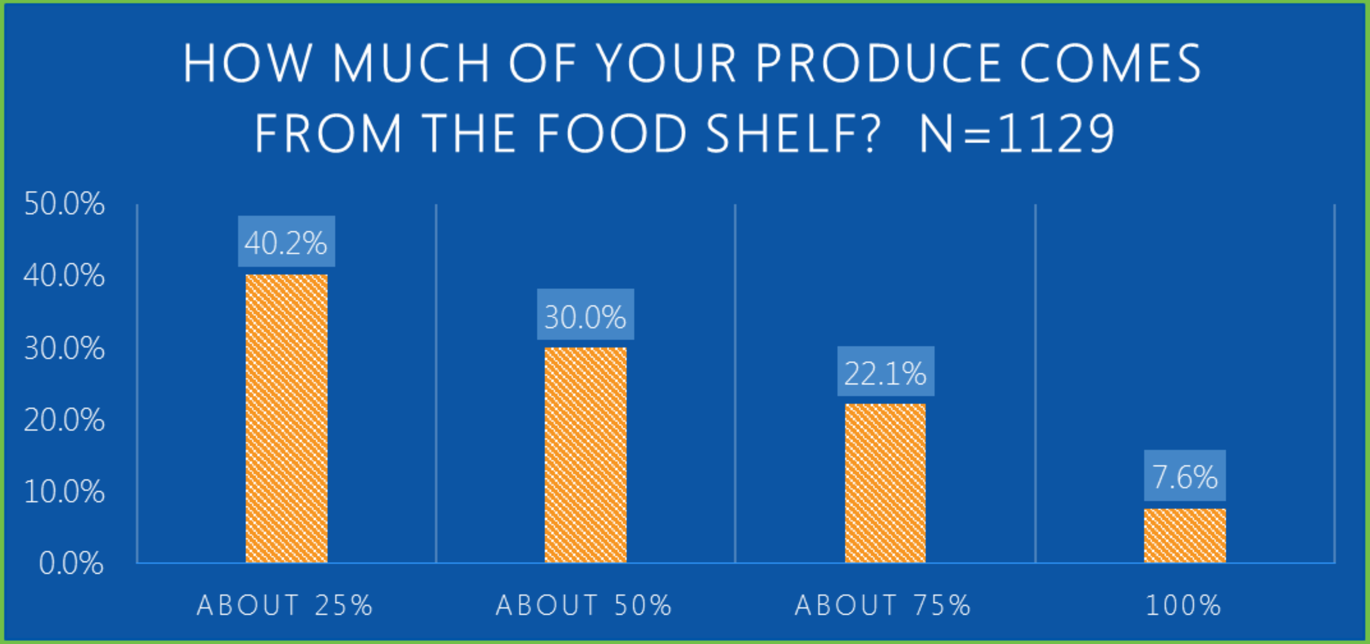




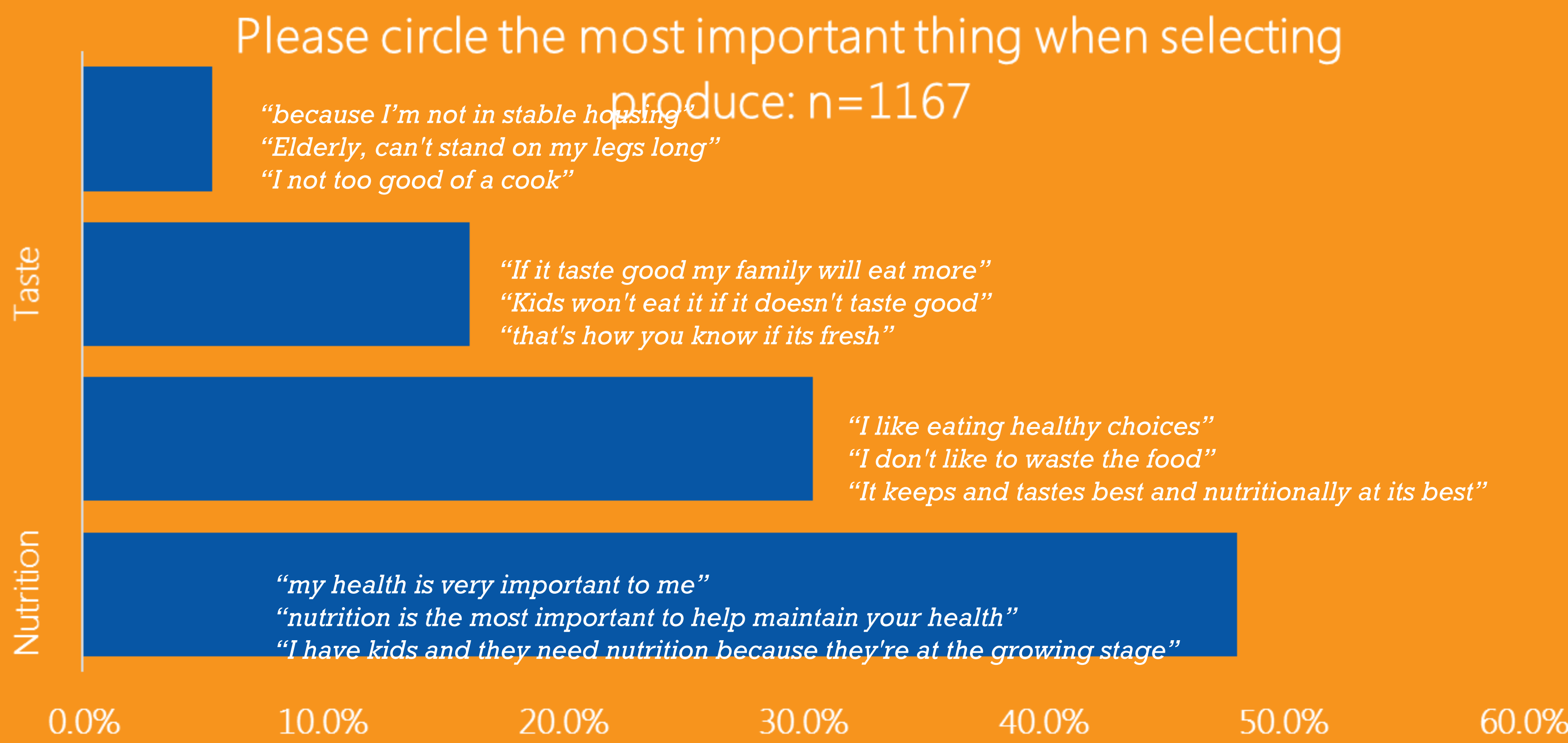


Majority of clients use the food shelf for most of their produce needs

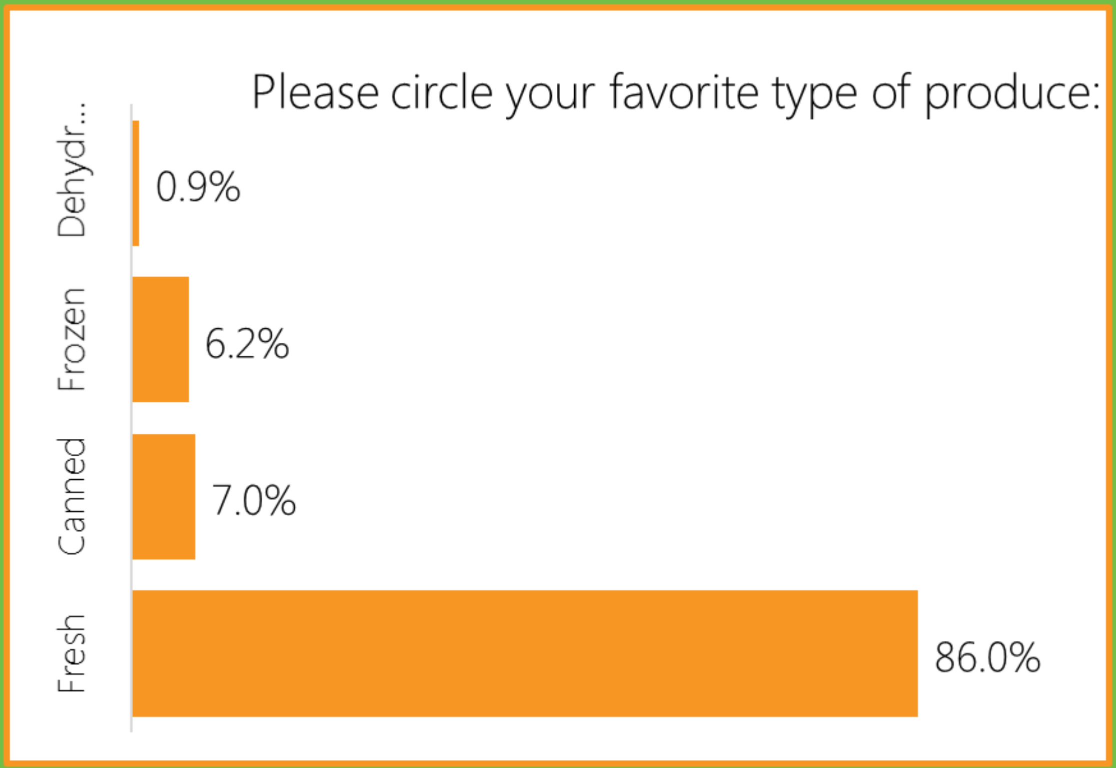
60% receive more than half of their produce from the food shelf



Nutrition is the most important decision maker when clients visit a food shelf



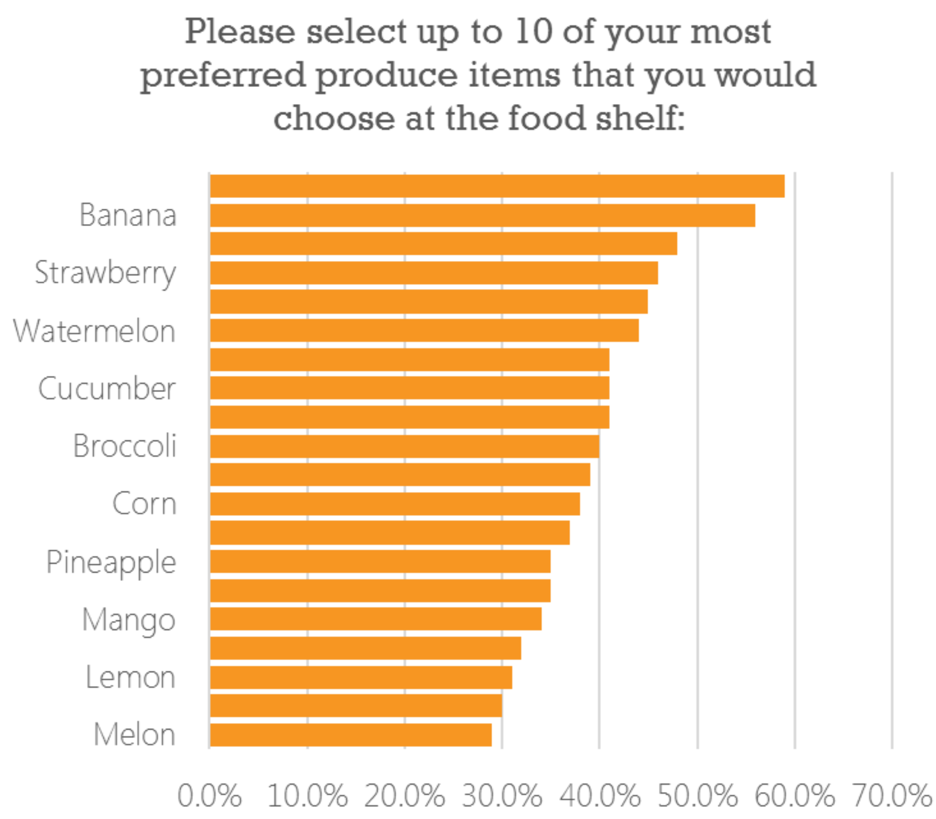
Fresh produce is the most preferred type of produce across all demographics

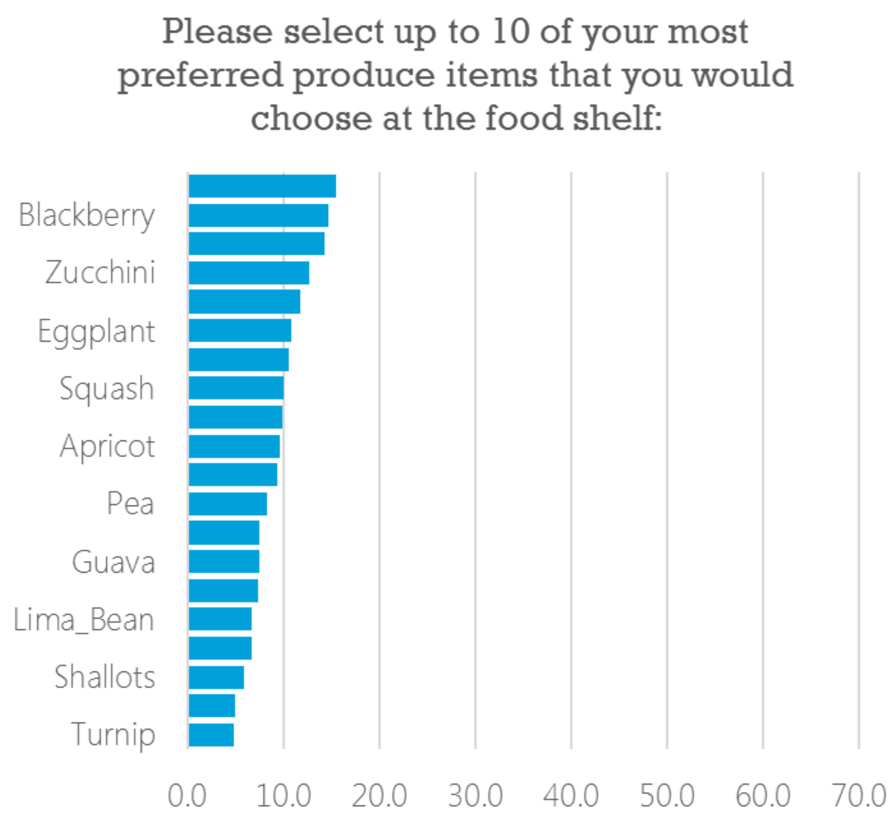


85% of respondents prefer fresh produce over canned, frozen and dehydrated

- 30% prefer fresh produce because they view it as more healthy
- 15% prefer fresh produce because of ease/knowledge of preparation
- Those who did select fresh alternatives did so due to easier prep and storage

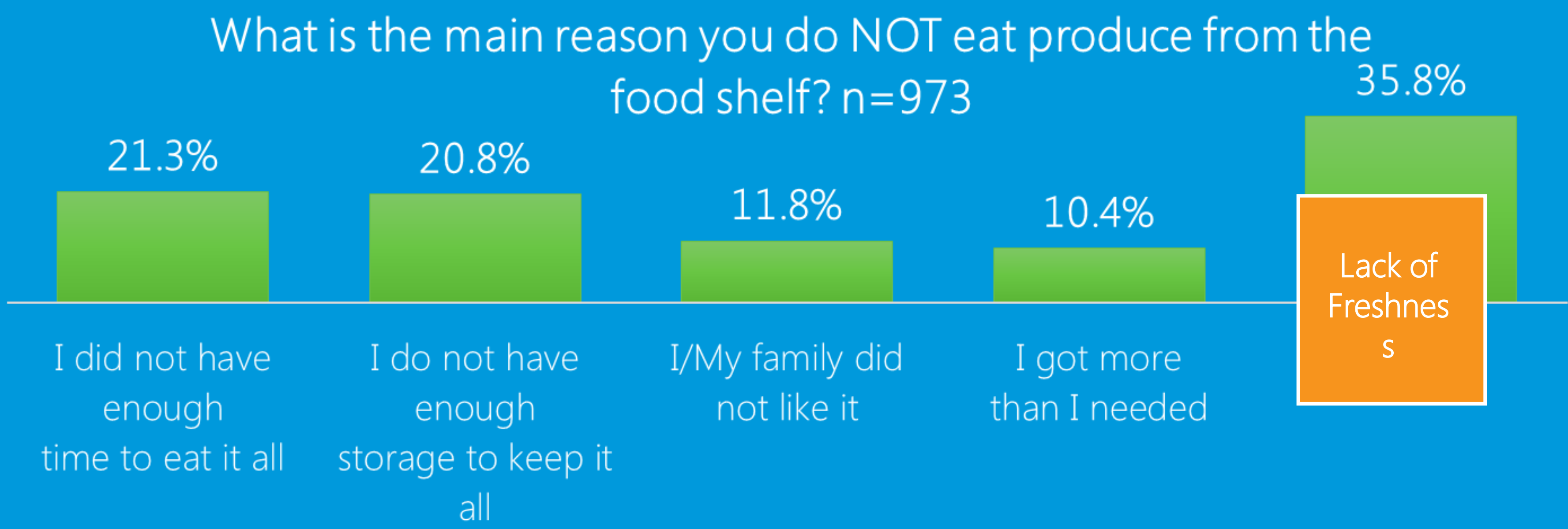
Top 20 produce items include mix of fruits and veggies





Quality and freshness are important factors when clients are selecting produce at the food shelf

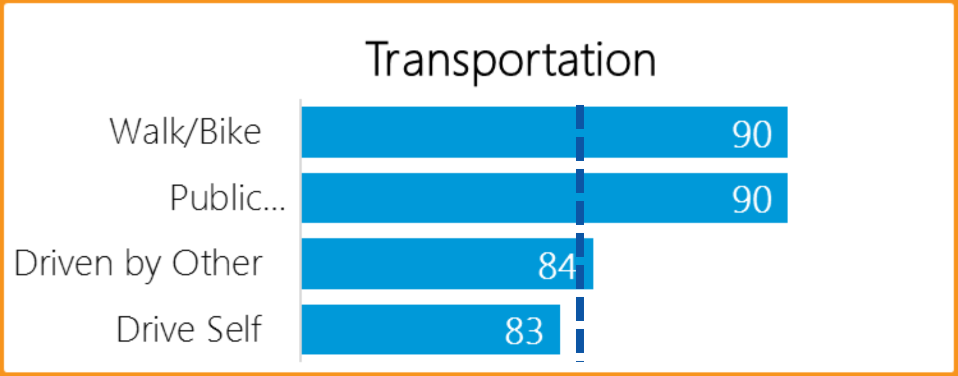
62% of Respondents who selected Other (N=215)
Wrote in that lack of freshness is the other reason they don’t get produce at the food shelf

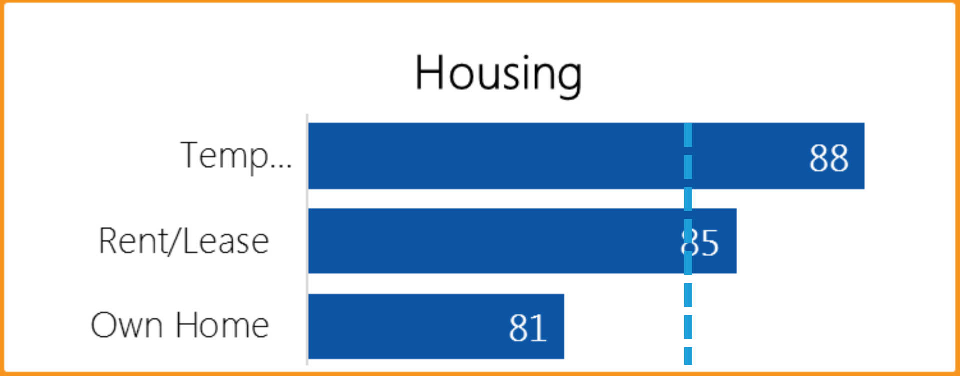


Almost all clients wish they could come get more produce often

Strongly Agree/Agree with "I wish I could come here and get produce more often"

- 84% of all respondents wish they could come and get more produce
- 90% of respondents who walk or bike agreed or strongly agreed with this statement
- 87% of respondents who are in temporary housing/homelessness agreed or strongly agreed with this statement





Insights to Action

Response Action Planning

1

Accessibility: Increase Frequency

- Food Bank Direct Distributions
- Consistent Produce Supply

2

Increase Freshness: Supply Chain

- Farm to Partner/Client Distributions

3

Increase Freshness: Supply Chain

- New order fulfillment procedures
- Quality Control audits

Accessibility: Food Bank Distributions

Short Term:

Hub & Spoke Expansion

Replication of the Penske partnership

Long Term:

Mobile Produce Distributions

Accessibility: Consistent Supply

Short Term:
Case Counted Subscription Program Expansion

Leveraging Mixing Center/other sources to replicate a seasonal program

Long Term:
Commodity Specific Strategies on "Top 5"

Build strategies around the "gateway" commodities for consistent access to most desired commodities

Freshness: Shortening Supply Chain

Short Term:

Farmers Market Agency Pickup (FMAP)

Long Term:

Community Farmers Market

Hub for partners AND community engagement

Freshness: Culling

Produce Pallet Audit

- Identifying problem sources and/or varieties

Potato Repack Audit

- Procedure changes

second harvest
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Thank You