

Kirkland Wednesday Market

Rapid Market Assessment

August 20, 2003

Market Hours: Wednesday, 12:00 a.m. – 7:00 p.m.
Location: Park Lane East between 3rd & Main, Downtown
Market Staff: Part-time manager
Opened: 2001
Fees: \$25/day for farmers or processors; \$30 for crafters or bakers
Vendors: 60, including farmers, processed foods, and artisans
Market Sales: \$33,217 estimated sales for the day
Market Attendance: 4,192 estimated adults

RMA Team:

Vance Corum, Washington State University Small Farms Program, Vancouver
 Judy Brezina, Chelan Farmers' Market
 Peg Tennant, Coupeville & Oak Harbor Farmers' Markets
 Wendell Mathews, Kittitas County Farmers' Market, Ellensburg
 Gloria Mathews, Kittitas County Farmers' Market, Ellensburg
 Zach Lyons, Washington State Farmers Market Association

I. Total Attendance: 4,200 adults

Pre-opening shopper estimate	=	124
1 st Hour (12:00-1:00) estimate	=	798
2 nd Hour (1:00-2:00) estimate	=	732
3 rd Hour (2:00-3:00) estimate	=	672
4 th Hour (3:00-4:00) estimate	=	564
5 th Hour (4:00-5:00) estimate	=	414
6 th Hour (5:00-6:00) estimate	=	390
7 th Hour (6:00-7:00) estimate	=	498

Comment: There are 65% more customers during the first half of the market day thru 3:30 p.m. than the second half (2608 vs. 1584), with notably more brisk business. The market could shorten hours for this volume of customer traffic.

Entrances (by number and percentage each hour)

	<u>East</u>		<u>West</u>		<u>BOTH</u>	
1 st Hour	432	11%	366	9%	798	20%
2 nd Hour	348	9%	384	9%	732	18%
3 rd Hour	294	7%	378	9%	672	16%
4 th Hour	288	7%	276	7%	564	14%
5 th Hour	216	5%	198	5%	414	10%

6 th Hour	234	6%	156	4%	390	10%
7 th Hour	<u>276</u>	<u>7%</u>	<u>222</u>	<u>5%</u>	<u>498</u>	<u>12%</u>
	2088	51%	1980	49%	4068	100%

[When added, percentages may not be exact due to rounding to the nearest whole number.]

Comment: Customers seem to come equally from either end of the market. Almost all those coming from the east are parking in the municipal parking lot across Third Street, although some shoppers mentioned that the crowded lot sometimes causes them to skip the market. Half of all shoppers park to the west with greater likelihood that they will end up shopping downtown..

II. Dot Survey Questions

Four dot survey sheets were begun with the market opening at 12:00 a.m. A new set of sheets were put up at 3:30 p.m., halfway through the market day, so we are able to analyze data from customers in the first half and the second half of the market day. Differences are noted under *Time Comment*.

Customer willingness to “do the dots” led to more than 1000 participants, which is a very strong response. While there were 65% more shoppers counted during the first half, there were about 86% more shoppers who completed the dot questions during the early hours. People are somewhat less inclined after work, with greater heat, or rushing to get home for dinner.

Question 1: Where do you live?

N=1058

Kirkland	462	44%
Bellevue	98	9%
Redmond	79	7%
Juanita	63	6%
Bothell*	55	5%
Woodinville	33	3%
Seattle*	30	3%
Mercer Island	13	1%
Other King County	86	8%
Other	139	13%

Comment: While 44% of customers are from Kirkland, the market strength and its downtown location make it a considerable attraction even for those at a distance. One in five shoppers (21%) come from outside the communities named. While some may be reverse commuters from Seattle or elsewhere (Q4), others come primarily for the market.

**Bothell and Seattle were added to the list by customer request since these cities include market customers who may also commute to Kirkland for work.*

Time Comment: Shoppers from outside Kirkland were more likely to shop early. Kirkland residents made up 38% of all early shoppers and 54% of later shoppers, although their sheer numbers were stronger early among first-half shoppers that make up 62% of the total.

Question 2: How much have you spent (or will you) at the Farmers' Market TODAY?

N=1034

\$0	17%	
\$5	21%	
\$10	19%	
\$15	12%	<u>Average customer spending = \$13.47</u>
\$20	12%	
\$25	8%	
\$30	5%	
\$40	3%	
\$60	2%	
\$80	0%	
\$100	0%	

Comment: A rather high one-in-six shoppers spends nothing. All spending categories are considerably lower than at many other farmers' markets. The median expenditure was \$8.65; half the shoppers spend less and half spend more than this amount. Fewer than one-fourth (23%) spend more than \$20, in spite of ample product selection. We might look at whether the intermingled presence of non-food products weakens the overall desirability of food shopping at the market. Some downtowns encourage cross-promotions between businesses inside and outside the market to their mutual benefit.

Time Comment: There was little difference in early vs. late farmers' market spending - \$13.71 vs. \$13.03 per customer.

Total market sales can be roughly calculated as follows:

- ◆ 4,192 shoppers/1.7 adults per shopping group = 2,466 shopping groups (assumes 50% shopped as couples, 40% as singles, 10% with three adults)
- ◆ Total sales: 2,466 shopping groups x \$13.47 = **\$33,217**
- ◆ Sales per vendor: \$33,217 / 60 = \$554

If we were to use a less conservative figure of 1.6 adults per shopping group, we would arrive at 2,620 shopping groups, \$35,291 total sales, and \$588 average vendor sales. The figure of 1.7 adults was a conservative estimate to avoid any exaggeration of sales.

Question 3: How much will you spend in downtown businesses, including restaurants, in conjunction with your farmers' market visit TODAY?

N=1047

\$0	34%
\$5	12%
\$10	12%
\$15	9%
\$20	9%
\$25	6%
\$30	6%
\$40	5%
\$60	4%
\$80	1%
\$100	2%

Average spending in local business = \$16.03

Comment: Customers report spending 19% more in local businesses than they spend in the farmers' market, higher than in most downtown markets. Setting aside the 34% who spend nothing, the average expenditure of those who spend downtown is \$24. One-third (34%) of farmers' market shoppers spend \$20 or more downtown but their purchases represent 80% of total expenditures. Anecdotally, one visiting Japanese gentleman, originally reluctant to reply, proffered that he made expenditures of \$200 downtown along with \$60 in the market. Given the market's downtown presence, a cross-promotional effort might be considered to link market vendors and downtown businesses.

Time Comment: There was little difference in downtown spending between early and late farmers' market customers - \$16.17 vs. \$15.76. This is somewhat contrary to other communities where early farmers' market shoppers are frequently focused on the farmers' market and tend not to spend as much in downtown businesses.

Question 4: What was your primary reason for coming downtown today?

N=1132

Appointment	3%
Work	8%
Art galleries	2%
Restaurant	8%
Parks/Marina	6%
Specialty shops	3%
Farmers' market	57%
Other	12%

Comment: A strong majority (57%) of shoppers come downtown primarily for the farmers' market. (Answers were provided in this order to avoid an over-response by customers to the farmers' market option.) Yet, there are many other trip motivators including restaurant visits and work (8% each), parks/marina (6%), specialty shopping (3%), appointments (3%), and art galleries (2%). One in eight respondents had another explanation for coming downtown. Clearly, there is a complementary or synergistic effect of farmers' market and other purposes making downtown a desirable destination.

The slightly higher response rate indicates that some people used more than one dot on this question, a result of customers being intercepted as they crossed to the parking lot. In future research you may want to try right-to-left question placement if the same location is used so that participants only have one dot left at the final question..

Time Comment: Early customers were stronger than late customers among those downtown for work or restaurants (9% vs. 7%), park/marina (7% vs. 5%), and specialty shops (4% vs. 3%). Stronger responses for late customers were reflected with those having appointments (5% vs. 2%) and other reasons (15% vs. 10%). The farmers' market motivation for coming downtown was consistent for early and late shoppers.

III. Constructive Comments/Observations

The purpose of this section of the report is NOT to provide an overall grade to the market or rank it against any other. Rather, it allows for feedback from a fresh “outsider” perspective. The team noted elements they liked, what they thought could be improved and questions they had. The perspective of one team member may differ from that of another, thus explaining apparent contradictions in the comments; you may use these inconsistencies to spark discussion within your management team. The RMA process is about sharing; both the markets observed and the markets that sent observers should gain new insights and ideas for improved operation.

Physical Site

What team members appreciated about the physical site:

- Great downtown location and good access – city infrastructure is good support
- The curved street of tents looks good with clear access at both ends of market
- Parking is plentiful, convenient and much of it free
- Comfortable and steady flow of people
- Stroller, wheelchair and walker friendly
- Nice back of booth access on both sides
- Space usage is maximized with tight stalls and no empty “holes” in the market
- You’ve done a great job emphasizing displays

Physical Site – Improvements and Questions:

- Possibly cut back on the number of hours you are open
- Antique store owner spends too much time on parking – can you address this?
- Many vendors selling well before 10:00 a.m. yet vehicles in market until noon
- One vendor had vehicle in market long after 11:30 cut-off
- Too many canopies not properly anchored
- Dogs and wheels may present a liability
- One accident can negate years of “no problems” in a instant – eliminate the dogs
- Put the last vehicle across the west entrance to prevent a runaway vehicle coming up the street; put a huge banner along its side.

- ❑ It's a sea of white coming from the east - strip banners around pop-up edges would be great. While produce is best under white to avoid color distortion, other vendors could use color canopies and add to market flair without concern.
- ❑ 24' aisles are too wide - narrower to encourage more communication/friendliness among customers and vendors across from each other. Give 4' extra to north side.
- ❑ Only visible sign was high at 3rd Street; no street-level signage on major streets
- ❑ A uniformed officer trying to stay in the shade seems unnecessary - \$1000+/mo. is an exceptional burden unrivaled in other markets. Can it be avoided?
- ❑ Is there room to expand parking and market? Parking is limiting you now.
- ❑ A package pick-up zone (east and west end) would increase customer purchases.

Atmosphere

What team members appreciated about market atmosphere:

- All the different languages spoken by shoppers – wow!
- Nice mix of age, ethnicity, class – you have a complete cross-section of shoppers!
- Customers seemed happy at market and glad to help out with RMA
- Market is easy to stroll and take in
- Sensed good percentage of regular, weekly shoppers; good flow of customers
- Well organized, very friendly vendors make market enjoyable
- Obvious city cooperation such that street is closed with parking building available

Market Atmosphere – Improvements and Questions:

- ❑ Need more produce at east end
- ❑ Prefer diversity in canopy colors – demonstrates uniqueness of each business
- ❑ Hours seem too long; shorter market might add to vendor pleasantness
- ❑ Expand educational activities without giving up space to do it
- ❑ Help your vendors to maintain a pleasant attitude
- ❑ Train vendors & staff to know their varieties and sign them, not just “sweet” corn
- ❑ There is relaxed space to converse but not as much socializing takes place as the customer numbers would suggest because of long market hours.

Vendors and Products

What team members appreciated about vendors and products:

- Mostly very attractive booths with good signage
- Your market has the best quality displays in the state.
- Good percentage of clear signage in booths
- Love the senior center craft booth!
- Lots of flowers close to each other (although there may be a down-side as well)
- Good diversity and high quality with both farm products and crafts
- 23 of 60 vendors selling produce, plus 13 flowers

- Healthy competition in numerous areas including six vegetable growers, four fruit, three bakers, two nuts, three jewelers, etc.

Vendors and Products – Improvements and Questions:

- Would like to see more community non-profits regularly visible
- Some vendors' displays and energy didn't draw customer in – non-interactive
- Several need signs with farm name and location
- Could spread produce more thoroughly, especially on east end of market
- 13 flower growers (22% of vendors) is high; replace with meat, poultry, cheese
- Help vendors comply with marketing orders (Walla Walla onions, etc.)
- Franchises should not be allowed.
- Remind vendors re: hands touching face, then product
- Sanitation – eliminate dogs and open-to-air baked goods
- General feel of high-income shoppers – are all residents represented? Might check if customer demographics meet community profile.
- Is more organic produce feasible given the customer demographics?