

Pasco Farmers' Market Rapid Market Assessment October 25, 2003

Market Hours: Saturday 8 a.m. – Noon
Location: 4th & Columbia, Pasco, WA
Market Season: May through mid-November (also Wednesday market)
Market Staff: Manager, assistant manager and administrative assistant – all P/T
Opened: 1985
Fees: \$20 daily plus \$100/yr. for reserved space or \$25/yr. non-reserved
Vendors: 40, including 35 farmers, 4 processed foods, 1 restaurant
Market Attendance: 2,200 estimated adults
RMA Team:

Vance Corum, Washington State University Small Farms Program, Vancouver
 Suzanne Butler, Mt. Vernon Farmers Market
 Katie Deremegio, Tacoma Farmers Market
 Colleen Donovan, Heifer International
 Melisa Evangelos, Tacoma Farmers Market
 Zach Lyons, Washington State Farmers Market Association
 Veronica Yzquierdo, Pasco Downtown Development Association

I. Total Attendance: 2,200 adults

Pre-opening shopper estimate =	24	1%
1 st Hour (8:00-9:00) estimate =	444	20%
2 nd Hour (9:00-10:00) estimate =	492	22%
3 rd Hour (10:00-11:00) estimate =	726	33%
4 th Hour (11:00-12:00) estimate =	510	23%

Comment: Shoppers were well distributed over the four market hours. Given past experience at this market, we believe the relatively low turnout (44%) coming during the first half of the market was due to the freeze just hours earlier.

Entrances (by number and percentage each hour)

	<u>4th St.</u>		<u>Columbia</u>		<u>Plaza/Alley</u>		<u>ALL</u>	
1 st Hour	114	5%	222	10%	108	5%	444	20%
2 nd Hour	174	8%	276	13%	42	2%	492	22%
3 rd Hour	186	8%	420	19%	120	5%	726	33%
4 th Hour	162	7%	306	14%	42	2%	510	23%
	636	29%	1224	56%	312	14%	2172	99%

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

Comment: Nearly 56% of shoppers entered the market from the Columbia Street side where there is more parking. One in seven, surprisingly, enter from the plaza or alley.

II. Dot Survey Questions

Five dot survey sheets were posted on tripods and the team began to solicit shopper responses to the five questions when the market opened at 8:00 a.m. Five new sheets were installed at 10:00 a.m., halfway through the market day. Thus, answers from early shoppers and later shoppers are compared under *Time Comment*. Questions and answers were available in English and Spanish and there was always a bi-lingual team member available to intercept Latino shoppers, although their response rate seemed to be lower than that of English-speaking shoppers. About 55% of all 373 dot respondents were during the first half of the market day and 45% during the second half. Given that only 44% of total customers were counted in the first half of a cold early morning, we had a somewhat higher rate of shopper dot participation during the early hours.

Question 1: Where do you live?

N=369

Donde vive usted?

Pasco/East	4%
Pasco/West	21%
Kennewick/North	8%
Kennewick/South	18%
Richland/North	15%
Richland/South	13%
West Richland	5%
Benton County	7%
Franklin County	0%
Walla Walla County	2%
Other	7%

The market truly serves the entire Tri-City area.

Comment: More than one-quarter of market shoppers come from each of the tri-cities. Almost one in six shoppers (16%) come from outside the Tri-Cities area. More effort could be made to solicit responses from the Latino populace; with repetition of the dot process, familiarity should reduce hesitancy to participate, especially with more Latinos intercepting shoppers.

Time Comment: Only 11% of early shoppers came from outside the four cities versus 23% of later shoppers; the truism of greater distance leading to later shopping held true as with most markets. Customers from the west side of Pasco and south side of Kennewick and Richland were slightly more inclined than residents across town to shop in the first half of the market.

Question 2: On average, if a specific item costs \$1.00 in the supermarket, how much would you be willing to pay here for a similar product produced locally? N=363

Si un producto cuesta \$1.00 en el supermercado, cuanto estaria usted dispuesto a pagar en este mercado para un producto similar producido localmente?

\$.50	4%		
\$.75	23%		
\$.90	8%		
\$1.00	33%	<u>65% of customers will pay equal or more for "local."</u>	
\$1.10	7%	Early shopper (before 10:00 a.m.)	73%
\$1.25	18%	Late shopper (after 10:00 a.m.)	54%
\$1.50	6%		
\$1.75	0%		
\$2.00	1%		

Comment: Customers are split with one-third each wanting to pay less, the same and more for local food at the farmers' market compared to the supermarket. One-in-four Pasco Farmers' Market shoppers indicated a willingness to pay at least a 25% premium for farmers' locally produced foods.

Time Comment: Surprisingly, a consistent one-third (32%) of early and late customers were willing to pay at least 10% more than supermarket prices. However, 41% of early and 23% of late shoppers were willing to pay the same price. Notably, 12% of early and only 4% of late shoppers want a \$.90 product. The biggest difference was among those willing to pay \$.75 for an equivalent \$1.00 in supermarket product: 12% of early shoppers while 36% of later shoppers. Later shoppers clearly expect more bargains.

Question 3: What radio station do you listen to most?

N=335

Que estacion de radio escucha usted mas frecuentemente?

	<u>Ct.</u>	<u>Perc.</u>	
KFAE 89.1 fm	53	16%	
KORD 102.7	43	13%	
KEYW 98.3	36	11%	
KONA fm	28	8%	<u>53% focus on either KFAE, KONA, KORD or KEYW.</u>
KNLT 95.7 fm	22	7%	
KONA am	20	6%	
KTHK 97.9	15	4%	
KZHR 92.5	14	4%	
KXRX 97.1	12	4%	
KTWY 93.3 fm	11	3%	
KALE 960 am	10	3%	
KGTS 91.3 fm	8	2%	
KBLD 91.7 fm	8	2%	

105.3*	8	2%	* Added to list by respondents in the second half of market.
Campesina*	7	2%	
KFLD 870 am	7	2%	
KWWS 89.7 fm	6	2%	
KIOK 94.9 fm	5	1%	
KNSN 97.1 fm	5	1%	
KOLU 90.1 fm	5	1%	
KGSG 93.7 fm	4	1%	
KEGX 106.5 fm	4	1%	
KZXR 101.7	2	1%	
KGON fm	1	0%	
KRCW 96.3	1	0%	
KZZM	0	0%	
KMNA fm	0	0%	
KTBI am	<u>0</u>	<u>0%</u>	
	335	100%	

Comment: Advertising might be justified after comparing customer preference rates with each radio station's best package offer at the top four among market customers - KFAE (16%), KONA (15% between am & fm), KORD (13%) and KEYW (11%). Other stations may be appropriate as well with relatively low cost. Check for results to see if customer numbers relate to the stations where money is expended. Some stations might be interested in co-sponsoring certain events where you publicize their sponsorship, creating a win-win situation for both. To address the Latino audience, you might compare rates for 105.3 and Campesina, understanding that our response rate of 2% for each was low given that they weren't initially listed and the Latino dot response was poor.

Time comment: While the top six stations maintained their relative order with both early and late customers, the top three – KFAE, KORD and KEYW – had 3% more response early than late. With late shoppers, immediately following the top six was a four-way tie at 5% among KALE, KXRX, KZHR and 105.3. This might be useful in determining radio broadcasts from the market or selecting timeslots for a limited budget ad campaign. It also may be worthwhile to investigate and compare the demographics of radio station listeners and your customers.

Question 4: What products would you most like to see added to this market?

N=407

Quales productos mas le gustaria ver anadido a este mercado?

Meat, eggs & poultry	10%	Carne, huevos y pollo
Cheese, wines & deli items	17%	Queso, vino & productos deli
More produce	30%	Mas frutas y verduras
More organic	10%	Mas organico
Value-added items (jam, dressing, salsa)	7%	Productos procesados (marmelada, aderoso, salsa)
Seafood	14%	Mariscos
More crafts	11%	Mas artesanía

Comment: Almost 10% of respondents used an extra dot on this question. Based on a total of 407 responses, 30% said they wanted more produce. Second most popular was cheese, wine and deli items with 17% followed by seafood with 14%. Fourth, they want more crafts, followed closely by meat, eggs and poultry and by more organic products. A checklist with multiple responses would result in higher percentages for each.

Time Comment: “Cheese, wine & deli” was very popular among early shoppers (22% vs. 11% later). This was offset by later clamor for seafood (16% late vs. 13% early) and organic (13% late vs. 7% early).

Question 5: What is your primary reason for visiting the Farmers’ Market today?

N=391

Que es su razon primaria por visitar el Mercado de Agricultores hoy?

Quality & diversity	74%	Calidad y diversidad
Prices	11%	Precios
Atmosphere	15%	Ambiente

Comment: Far outdistancing other reasons, quality and diversity are the primary motivator for three of every four customers coming to the farmers’ market. The pleasant market atmosphere is the key attractant for 15%. Prices are the least important of these three factors with only 11% of customers selecting price as their motivation.

Time comment: Early customers give quality and diversity as their primary reason 82% of the time versus 66% of later shoppers. (The other 16% of later shoppers split fairly evenly between price and atmosphere.) While 45% of late customers want prices lower than the supermarket (Q2), about 15% of them selected price as the motivator here. Thus, it should be noted that most price-sensitive shoppers still come for the quality and atmosphere.

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 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:

- Nice structure to enhance market presence provides aisles of dense customer interaction.
- Sheds are great for organization and weather protection – functional, attractive, inexpensive.
- Vendor stalls clearly marked and well defined; vendors know where to go
- Written stall maps easy to understand; good preparation.
- Easy access with plentiful and convenient parking, including handicapped.
- On-site, permanent bathrooms

- With so many entrances there is never a bottleneck of annoying congestion.
- Good amount of space between rows for easy people flow.
- Mike seems to have good rapport with the vendors.

Improvements and Questions:

- Is there a way to show more of the market and fewer vehicles from the street?
- Clearer policies for reserved vs. non-reserved space would be fairer for vendors.
- Olympia has seniority based on years involved, prior year sales days, and prior year sales.
- Have farmers note on weekly load list their next sales day (next Sat. or other date).
- Vehicles entering at almost 8:00 a.m. creates liability with congregated customers.
- Market not blocked to vehicle traffic until after opening.
- Could the information building be integrated constructively (even if active in summer) and used as storage shed for signs during the week? If Mike meanders too much, he may not be able to best serve customers with questions; could you staff an info table with volunteers?
- Require vendors to use safety strips where customers step down (trip) into booth space.
- Could you have more tables and chairs?
- Canopies need weights.
- Aisles must be really cramped during peak season.
- Stray vendors outside would be better filling empty spaces inside for a full market feeling.
- Consider extra features like bike rack, dog care area, food demo station and water fountain.
- Are aisles wide enough during mid-summer, heavy customer periods? Consider aisle width if you expand into the street.

Atmosphere

What team members appreciated about market atmosphere:

- Good job! Wonderful mix of people, vendors and product! Lots of Hispanics, some Asians.
- Since everyone knows where to go during set-up, there was little sense of chaos.
- The majority are farmers, not crafters, so the feeling is rural – what people are looking for
- The abundance of farm products is excellent; dominance and selection of farmers is great.
- Great location and everything is central so atmosphere is close, lively and familiar.
- Market set-up creates good economic tension – comparison shopping is easy and feeling is still friendly.
- Serious shoppers; strong customer service feel as farmers carted boxes to customer cars.
- Assertive, not aggressive, farmers; farmers are diverse just as customers.
- Very good energy – peaceful while energized
- Not yuppified – seemed like a real community event
- Not too crowded – steady flow throughout the morning; aisles are crowded.
- Many happy WIC clients and seniors
- Clean site
- People seemed focused on shopping more than visiting and being entertained
- Nice ethnic, gender and age mix; Hispanics shopped more as family, white kids with mom
- Pumpkin carving contest was a great idea
- I love this market for the space and feel - walking down the center aisles surrounded by energy and food.
- Welcome back into the WSFMA. We missed your market. This is one of the great markets in the state!

Improvements and Questions:

- Atmosphere might be enhanced by music, especially Mexican bands.
- How about an opening and closing bell?
- Flags on market exterior, along and over the street would add to the attractive, festive nature.
- More color in flowerbeds and plaza would be a nice addition as in any downtown.
- Make a bigger deal of special event activity and announcing the winner with celebration!
- Do you have a regular educational or entertainment feature for families?
- More colorful vendor signage would add to atmosphere.
- With 82% Hispanic businesses downtown, there is tremendous opportunity to cross promote.