

Tacoma Farmers Market

Rapid Market Assessment

August 21, 2003

Market Hours: Thursday, 9:00 a.m. – 2:00 p.m.
Location: Broadway between 9th and 11th, Downtown
Market Staff: Manager and assistant
Opened: 1991
Fees: \$18 for 10'x 10' plus 5% fee for farmers (over \$200),
6% processors, 8% crafters and 10% prepared foods
Vendors: 101, including 42 farmers, 7 processors, 37 crafters, 15 foods
Market Sales: \$23,384 vendor reported sales
Market Attendance: 5,800 estimated adults
RMA Team:

Vance Corum, Washington State University Small Farms Program, Vancouver
Grant Davidson, Kirkland and Woodinville Farmers' Markets & WSFMA Pres.
Rich Hines, Washington State University Small Farms Program, Puyallup
Karen Kinney, Neighborhood Farmers Market Alliance, Seattle
Yoshi Kadoya, NFMA and Waseda University, Tokyo, Japan
Neil Landaas, Snohomish Markets Inc., Snohomish
Zach Lyons, Washington State Farmers Market Association
Marcy Ostrom, Washington State University Small Farms Program, Puyallup
Scott Rice, Pike Place Market PDA, Seattle
Jim Robinson, Port Angeles Farmers' Market
Valerie Thelen, Puyallup Farmers' Market
Sonie Waltier, Sumner

I. Total Attendance: 5,792 adults

Pre-opening shopper estimate	=	26	0%
1 st Hour (9:00-10:00) estimate	=	414	7%
2 nd Hour (10:00-11:00) estimate	=	1002	17%
3 rd Hour (11:00-12:00) estimate	=	1494	26%
4 th Hour (12:00-1:00) estimate	=	1854	32%
5 th Hour (1:00-2:00) estimate	=	1002	17%

Comment: While the first hour seems to be a slow start with fewer than 8% of total shoppers, the customer counts steadily rise and remain surprisingly strong even during the final hour, uncommon for most markets. The second half of the market, from 11:30 to close, had 62% of all shoppers, which is typical of downtown, weekday markets with a workforce entering the market during the lunch hour.

Entrances (by number and percentage each hour)

	<u>South</u>	<u>North</u>	<u>East</u>	<u>Rhodes</u>	<u>ALL</u>
1 st Hour	3%	4%	1%	0%	7%
2 nd Hour	3%	12%	1%	1%	17%
3 rd Hour	10%	12%	2%	3%	26%
4 th Hour	9%	18%	3%	2%	32%
5 th Hour	<u>5%</u>	<u>12%</u>	<u>0%</u>	<u>0%</u>	<u>17%</u>
	29%	58%	7%	6%	100%

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

Comment: Twice as many customers enter from the north as from the south, which may reflect available parking or where downtown businesses are located. Future research may want to ascertain what parking is most used.

Given the number of downtown workers who simply walk through the market without shopping, it is difficult to estimate average customer sales from sales reported by vendors. In the future it might be useful to count customers walking out of the market area carrying something to estimate a truer customer count.

II. Dot Survey Questions

Four dot survey sheets were begun with the market opening at 9:00 a.m. A new set of sheets were put up at 11:30, 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*. People were equally responsive to participating in the research whether they came early or later, which meant that we had about twice the number of participants from among second-half customers as first-half shoppers.

Question 1: Where do you live?

N=1395

	<u>1st Half</u>	<u>2nd Half</u>	<u>Total</u>
Tacoma North end/Downtown	11%	16%	27%
Tacoma NE/Dashpoint	1%	4%	5%
Tacoma South/East	6%	7%	13%
Fife/Milton/Edgewood	0%	1%	2%
Federal Way/Kent/Auburn	1%	4%	5%
Lakewood/U. Place/Steilacoom/Fircrest	4%	9%	13%
Gig Harbor/Port Orchard	2%	4%	6%
Other Pierce Co.	5%	9%	14%
Thurston/Kitsap Co.	0%	2%	3%
Other King Co.	0%	4%	5%
Other	<u>2%</u>	<u>6%</u>	<u>8%</u>
	35%	65%	100%

Comment: The market has 45% Tacoma shoppers and 60% from within Pierce County.

Time Comment: Pierce County residents shop represent 67% of early shoppers while only 56% of later shoppers. This fits a general trend of more distant shoppers coming later. Later shoppers are downtown workers who commute from outlying areas.

Question 2: How frequently do you come to the market?

N=1375

Every week	17%	
Most weeks	16%	
Twice a month	11%	<u>43% of shoppers come 2 or more times/month.</u>
Once a month	8%	
Occasionally	24%	
Visitor – 1 st /2 nd time	25%	

Comment: Half of market customers are visitors or occasional shoppers. If we discount visitors, 58% of shoppers come two or more times per month. Further research might focus on what changes/improvements might cause them to shop more regularly.

Time Comment: Visitors or occasional shoppers are more common early in the market; they are 54% of early shoppers vs. 46% of later shoppers. They are outnumbered by downtown workers on their lunch break during the later half of the market.

Question 3: What form of advertising most influences your decision to attend this market? (Put dot on “Old-Timer” if you have shopped here 2+ years.)

N=1331

Newspaper ads	3%	
Newspaper articles	2%	
TNT What’s Fresh column	3%	
Poster/rack cards	1%	
Sandwich boards	1%	Word-of-mouth dominates decisions.
Market website	1%	
State Farmers Mkt listing	1%	
Drive by	7%	
Word-of-mouth	44%	
Old-Timer	37%	

Eliminating “old-timer” responses and analyzing the remaining 63% of respondents, we find the following power of advertising for getting new customers:

Word-of-mouth	70%	
Drive by	10%	
Newspaper ads	4%	
TNT What’s Fresh column	4%	Newspapers and location/visibility = 25%.

Newspaper articles	4%
Sandwich boards	2%
State Farmers Mkt listing	2%
Poster/rack cards	1%
Market website	1%

Comment: A surprisingly low 37% claim to be old-timers, frequently in the 60-80% range in other markets. Word-of-mouth is effective in attracting 70% of new customers with an additional 12% driving by or seeing the sandwich boards. Another 13% of new customers are motivated by the newspaper in some form. All advertising methods support word-of-mouth; each reinforces the other. Future questions might investigate how to get people more involved in the word-of-mouth campaign.

Time Comment: Old-timers are 38% of late shoppers and 34% of early shoppers, due to downtown workers who are loyal customers shopping later. Respondents to word-of-mouth are 44% of late shoppers vs. 41% of early shoppers. Notably, newspaper respondents are twice as likely to be early shoppers rather than late.

Question 4: How much time will you spend in the downtown today, not including at the Farmers' Market?

N=1383

0-15 minutes	15%	Excluding those working downtown, the average customer spends an extra 40 minutes downtown.
15-30 minutes	9%	
30-45 minutes	9%	
45-60 minutes	10%	
1 - 1 ½ hours	10%	
1 ½ - 2 hours	7%	
2+ hours	9%	
Work downtown	31%	

Comment: Of all customers 43% spend an hour or less time in other activities downtown, 25% spend more than an hour, and 31% are downtown all day. These figures leave much room for cooperative advertising and promotional campaigns between the market and downtown business.

Time Comment: Early farmers' market customers are 50% more likely to spend an hour or less doing other activities downtown (55% vs. 37% of late customers, while 67% v. 60% among non-downtown workers). This fits the general profile of a customer bent on the farmers' market and wanting to get their fresh produce home quickly. Those who work downtown are 38% of late shoppers, yet only 18% of early shoppers; this reflects the profile of downtown workers coming to market after 11:30 a.m. during their lunch break.

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:

- \$18 plus percentage commission appropriate to vendor type
- Professional, efficient vendor set-up with one-way unloading and loading
- Well organized – multiple staff to handle problems and field questions
- General good flow with enough width except pinch points like food court area
- Lots of entry points
- Like how farmers are kept close enough together to keep food orientation
- Club that coordinates volunteers
- Great parking with garages nearby
- Nice site – leads to many walk-throughs, few of whom are there for produce
- Well marked boundary at south end
- Excellent tables for customers to eat and relax in food court
- Right number of bakery vendors

Physical Site – Improvements and Questions:

- Parking access and north end barrier need solutions; overall concern with safety
- Diamond parking lot ideas – 25 orange cones, “One-way, do not enter,” “Lot full,” “Slow,” “Eyes peeled – vehicle traffic”
- 9th & Broadway may need police presence, better “Street Closed” barricades
- City should pay for post holes to avoid liability, more substantial than cones
- Eating area feels too close to cars driving into Diamond parking lot
- Use taco truck as more solid barrier/protection with eating tables to south side
- Need space between Mexican food van and flower vendor – too far into walkway
- 11th & Broadway needs barricades to prevent drivers turning into market
- Need welcoming identity signage to define place
- Use sandwich boards at market ends for “TFM Loading only”
- Could tighten market spaces to accommodate more farmers; vendor gap near 9th
- 8:45 a.m. seems too close to opening for vendor entry
- Lack of seating – office workers won’t sit on grass – means few listen to music
- Where are garbage cans?
- Master Gardeners are great but need to be next to plant vendors to keep busy
- Parking difficult – regulars have it figured out but is it deterrent to newcomers?
- Parking with Rhodes pass-through is confusing – more would come if made easy
- Heard that parking payment method was unclear
- Make sure parking options are listed on promotional materials
- Too many vendors without canopy weights; does the wind ever rip through here?
- Didn’t see drip pans under vehicles – must be tough to enforce
- South end a bit tight for flow of shoppers; south end need more market signage

- What about a shopping map at north entrance with vendor and ATM locations?
- Get shopping bags near main entrance
- Large food court – too many concessionaires (vs. supply/demand argument)
- Use park space better – cooking demos, jugglers, theatre, better music, etc. – could involve the arts community
- Not inspired to go up to park area – many people miss it. Idea – put more or all concessionaires by the stage – people will go to eat, gives more visibility to all

Atmosphere

What team members appreciated about market atmosphere:

- Market looks nice with lots of color and variety; festive, great time; cozy street
- Great public seating / common areas
- Nicely placed vendor mix, appreciate corner rose grower, intimate feel both ends
- Ethnic, age, income & family diversity, interested with questions/suggestions
- Vendors seem friendly with each other and customers
- Incredible capture of foot traffic at lunchtime, although too busy for dots
- Beautiful setting and nice display at market information tent
- Good market feel – happy people!
- Magic guy is great
- Really appreciate the involvement of kids
- Flowers appear popular with office workers
- Like the variety created by several vendor pocket areas but understand it is difficult on vendors

Market Atmosphere – Improvements and Questions:

- Enhance friendly, cozy, fun feeling with big TFM identity banners at entrances
- Possibly too many flowers; many people critiqued the market for preponderance of flowers and concessionaires at the expense of food growers
- Several shoppers said they would not attend a Saturday market
- Need agricultural education to link community and farmers, promote ag
- Music could be louder
- Young moms with kids make it peaceful – what about kids' activity tent?
- Lots of wheelchairs – any special reason?
- The most serious shoppers do not appear to be office workers who are rushed
- Lots of people but few buyers
- Shoppers more casual and less intentional – can you provide bags or carts?
- Social mix with office workers feels like a food fair/lunch venue – is this a daytime market phenomenon?

Vendors and Products

What team members appreciated about vendors and products:

- 4,000 lbs. of food annually go to the Food Bank
- 1,000 lbs. of green waste recycled weekly
- Nice placement of nurseries at south end
- Great customer service and market info booth; wonderful carry-out wagon service
- CSA is great! Nice mix of organic and conventional.
- Good produce of what is present; high quality produce (but need more)
- Positive, pro-active vendors for the most part.

Vendors and Products – Improvements and Questions:

- Very heavy on crafts – some appear not 100% made by vendor; lots of resale craft
- Many booths need more signage; flower growers lack name and identity. Each should have unique identity with farm and family name clear.
- Lots of crafters in south half don't have signage. Hard to tell if crafter or grower.
- If managers insist on signage, maybe we'll see it!
- Stoneground bakery needs to advertise their unique product.
- Your rule that allows non-certified growers to use word "organic" is problematic and unfair; "no spray" non-certified growers also contradict WSDA position.
- If customers' primary interest is organic, you need growers or you'll lose them.
- Seems like a coffee stand with more bakery items would serve casual shoppers
- Need more produce relative to other vendor types, although flowers seem to sell well to office workers
- Variety lacking - organic fruit, meat, eggs, melons, peppers, eastern Washington
- Could have more promotion of "local"
- While plants good at south end, get a good farmer with display on SE corner
- Salsa waiting one month for sampling permit. He's a start-up and needs it now!