

University District Farmers' Market

Rapid Market Assessment

September 7, 2002

Market Hours: Saturday 9 a.m. – 2 p.m.
Location: NE 50th Street & University Way, Seattle, WA
Market Staff: Manager, assistant, cooking demo coordinator and chef assistant, and 2 volunteers
Opened: 1993
Fees: 6% or \$25 farmers/\$30 bakers and prepared foods
Vendors: 51, including farmers, bakers and prepared foods
Market Sales: \$62,275 estimated sales for the day
Market Attendance: 4,700 estimated adults

RMA Team:

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 Marcy Ostrom, Washington State University Small Farms Program, Puyallup
 Arno Bergstrom, WSU Kitsap County Cooperative Extension
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I. Total Attendance: 4,700 adults

Pre-opening shopper estimate = 120
 1st Hour (9:00-10:00) estimate = 1068
 2nd Hour (10:00-11:00) estimate = 960
 3rd Hour (11:00-12:00) estimate = 1212
 4th Hour (12:00-1:00) estimate = 750
 5th Hour (1:00-2:00) estimate = 570

Comment: About three in every five shoppers came during the first half of the market, 2774 customers (59%) in the first half of the market through 11:30 a.m. and 1926 customers (41%) in the latter half. This may have resulted from customers' concern for getting their shopping done early given the UW football game that afternoon.

Entrances (by number and percentage each hour)

	<u>NE</u>		<u>NW</u>		<u>SE</u>		<u>SW</u>		<u>ALL</u>	
1 st Hour	37	5%	29	4%	44	6%	68	9%	178	23%
2 nd Hour	27	4%	32	4%	52	7%	49	7%	160	21%
3 rd Hour	48	6%	27	4%	49	6%	78	10%	202	27%
4 th Hour	33	4%	27	4%	33	4%	32	4%	125	16%
5 th Hour	17	2%	22	3%	36	5%	20	3%	95	13%
	162	21%	137	18%	214	28%	247	33%	760	100%

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

Comment: More than three in every five shoppers entered the market from one of the southern entrances, implying that they came from parking along or on the other side of 50th Street. This may result in part from people coming off the I5 and tending to turn right off 50th to park once they see the market rather than turning left across 50th Street traffic.

II. Dot Survey Questions

Four dot survey sheets were begun shortly after market opening at 9:00 a.m. Four new sheets were installed at 11:30 a.m., half way through the market day. Thus, answers from early shoppers and later shoppers are compared under *Time Comment*. About 52% of all dot respondents were during the first half and 48% during the second half of the market day. We actually had a higher rate of shopper participation doing the dots during the latter half of the market.

Question 1: How much will you spend TOTAL at the farmers' market TODAY?

\$0-5	9%	
\$5-10	12%	
\$10-20	29%	
\$20-30	21%	<u>Average customer spending = \$23.85</u>
\$30-40	14%	Early shopper (before 11:30) \$26.93
\$40-60	10%	Late shopper (after 11:30) \$21.69
\$60-80	3%	
\$80+	2%	

Comment: The median expenditure was \$20; half of shoppers spend less and half spend more than this amount. With half spending \$20 or less, maybe they only come with a \$20 bill. They represent less than a quarter of all sales. Shoppers in each of the intermediate spending categories (\$10-20, \$20-30, \$30-40, \$40-60) generate nearly equal sales for vendors. Just as in supermarkets, we should work to increase spending by regular, serious shoppers. We might improve those sales through education about average household grocery expenditures, a frequent shopper card, and an expanded array of desirable products and pricing. In the future we might ask for suggested improvements and suggested additional products both to create more regular shoppers and increase purchases.

Time Comment: Early shoppers spend significantly more money; 34% spend \$30 and up, while only 24% of later shoppers spend the same. Only 14% of early shoppers spend under \$10, while 28% of later shoppers spend under \$10. On average, late shoppers spend \$5.24 less than their early counterparts, which may be related to reduced availability of products, lower end-of-day prices, different shopper demographics (less household income as reflected in Q4) or other factors.

Total sales figures can be estimated at:

- ◆ 4,700 shoppers/1.8 adults per shopping group = 2,611 shopping groups (assumes 25% shopped as singles, 70% with two adults, 5% with three adults)
- ◆ 2,611 shopping groups x \$23.85 = **\$62,275**
- ◆ Sales per vendor: \$62,275/51 vendors = \$1,221

A less conservative figure of 1.6 adults per shopping group would lead to 2,937 shopping groups, a sales total of \$70,059 and average vendor sales of \$1,374. The figure of 1.8 adults was based on an analysis of customers defining household size in Question 2. In avoiding any overestimation of sales, we used the 25% singles figure as reported by customers and we conservatively assumed that shoppers for households of two or more people were with another adult shopper, even though we know that not to be the case.

Question 2: How many people are you shopping for, including yourself?

One	25%	<u>63% of shoppers are in households of 1-2 people.</u>
Two	38%	
Three	17%	
Four	13%	
Five	5%	
Six+	3%	

Comment: Only one in five customers is shopping for a traditional household of four or more people. (Note: Shoppers for larger households may be slightly less inclined to answer the dot questions given that they have hands more full or are in a rush to get back to the family.)

Time comment: Of later customers, 30% were shopping just for themselves versus 20% of early shoppers. Coincidentally, early shoppers were more likely to be shopping for a two-person household, 41% versus 35% of later shoppers.

Question 3: Where do you live?

Ravenna	11%	<u>Geography does not limit appeal.</u>
Roosevelt	3%	
U-District	14%	
Wallingford	8%	
U-Village	5%	
Capitol Hill	6%	
Northgate	5%	
Greenwood/Phinney Ridge	8%	
Montlake	3%	
Other Seattle	25% (125 or 14% wrote in their city)	
Other	12% (34 or 4% told us their location)	

Other Seattle location write-ins: 14-Ballard, 10-Fremont, 9-Viewridge, Queen Anne, Wedgewood, 8-Greenlake, Central district, Shoreline, 6-Laurelhurst, 5-Maple Leaf, 4-Magnolia, 3-Eastlake, Lake Forest Park, Madrona, Sandpoint, 2-Bell Town, Bothell, Brier, Denny Blaine, Kenmore, Mercer Island, Mt Lake Terrace, 1-Broadview, Burien, Columbia City, Georgetown, Haller Lake, Hawthorne Hill, Judkins, Latona, Union, W.Seattle
“Other” WA write-ins: 2-Belluvue, Edmonds, Kirkland, Redmond, Skagit; 1-Camano Is., Enunclaw, Everett, Hansville, Karema, Lynnwood, Mt. Baker, Olympia, Renton, Sammamish, Snoqualmie, Spokane
“Other” write-ins: London, Germany, Madison, 2-CA, 3-NY, Las Vegas, New Orleans, Tampa

Comment: The customer distribution demonstrates that the University District Farmers’ Market draws residents from throughout the Seattle area as well as a significant number of tourists – 12% from outside the Seattle area.

Time Comment: Shoppers coming from a distance (other Seattle and elsewhere) are more prevalent in the latter half of the market. It is not surprising that local shoppers coming the least distance arrive early and spend more.

Question 4: What is the total annual income from all sources of the household for which you are shopping?

Under \$15,000	10%	
\$15,000-25,000	10%	
\$25,000-35,000	10%	
\$35,000-50,000	14%	
\$50,000-80,000	19%	<u>Median household income – app. \$57,000.</u>
\$80,000+	36%	

Comment: A median household income of \$56,944 would be established if the distribution of respondents were spread evenly through the \$50,000-80,000 response range. The high income levels are not surprising given the cost of housing and other living expenses in Seattle. Some shoppers complained about tight household budgets even in the \$80,000+ range, leading them to feel researchers were unfairly portraying them as wealthy because we did not provide higher income ranges. The market may want to purchase mailing lists or target magazines with appropriate demographics for additional shoppers, or use satisfied customers or celebrity chefs in local advertising.

Time Comment: Early shoppers are wealthier, 44% having over \$80,000 income versus 28% of later shoppers. One in five early shoppers, but two in five later shoppers, have household income under \$35,000.

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:

- The new metal fence holds many attractive banners and the arched entrances establish a sense of credibility.
- Well-organized layout given the space limitations and strong crowd.
- The flow appears even throughout the market, giving all vendors fairly equal access to customers.
- Late farmers have to hand carry their goods.
- Parking must work well or customers would not keep coming. Parking limit of 1-2 hr. keeps folks moving. Parking tokens are great.
- Effective information booth with assistance, directions and parking tokens continuously available from staff with name tags.
- Excellent, convenient storage shed.

Improvements and Questions:

- Is there another local site that would allow for the expansion that you are capable of?
- Limited parking, with people worried about meters running out, leads to lost sales per customer and lost customers.
- Could the market be stretched by an hour at a time to enlarge the customer capacity?
- What is limiting local attendance – parking, prices, products?
- While the SE and SW entrances are good, permanent signs angled toward drivers would give dramatic marketing punch 24/7 .
- Can the city help on continued site improvements - shade trees, seating for eaters, easily accessible restrooms, water feature, drinking fountain, hand washing stations, dog care area, bike rack, and expanded chef demo area near community center?

Atmosphere

What team members appreciated about market atmosphere:

- Strong “green” shoppers with reusable bags, baskets and carts add to the atmosphere
- Fabulous family destination with atmosphere like shopping at Whole Foods, couples with kids, disposable income, security officer
- Pea Patch, play structures and community center add nice community feel
- High percentage making multiple trips to car
- Diverse ethnicity, language and income, although seemed to be mostly white

- Some food items only available here at U District
- Appreciative customers willing to wait in line yet a fun, hurried atmosphere
- Garden improvements provide look of permanence, colorful streetscape is appealing
- Food bank pick-up and thorough clean-up at end of market

Improvements and Questions:

- Can more music be arranged in a couple market locations?
- Would be nice with easier access from market to playground.
- Nonprofits along south side seem to get less attention.
- Need more educational and entertainment activities for children although that would worsen parking problem.
- More conventional growers with lower prices would lessen the high-end feeling and provide more low-income food access.
- Keep the info booth up until market close.

Vendors and Products

What team members appreciated about vendors and products:

- Bountiful array of organic, choices and aromas. Most presentations excellent with angled and stacked displays like top grocers.
- Wide variety of vegetables, E. WA fruit, fish, frozen meat, mushrooms, baked goods and pasta.
- Substantial sampling of new and unusual products with unique flavors makes the market very appealing.
- Vendors engage customers in courteous, helpful manner.
- Chef demo with 40+ people listening was inspirational.
- Customers invited to enter individual mini-markets to shop and ask questions.
- Good array of prepared food vendors adding extra selection and impulse buying tendency (eat now).
- Many good displays & chalkboard notes.

Improvements and Questions:

- How is the Seattle market expansion program impacting farmers and customers?
- Need sales training to improve farm image - colorful signs, appropriate height, vertical displays, professional over cardboard look, regular clean-up, weighted canopies to shade product, and sampling and sanitation standards
- Can you expand hot drinks and other edibles for on-site consumption?
- Some curiosity about waiting list policy since not all vendors are high quality
- Expand farmer and market advertising of tokens paid for by credit card.