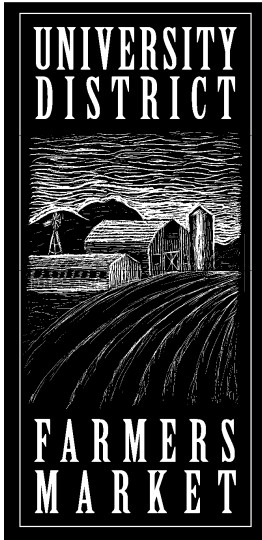


University District Farmers Market Shopper Survey

November 20, 2010, 9-11am



The University District Farmers Market conducted an interactive sticky dot survey which sampled approximately 330 shoppers on Saturday, November 20. The survey sample was approximately 10% of the total shopper count that day of 3,120.

Shoppers were asked 4 questions regarding their shopping habits and one general question regarding where they lived.

It should be noted that November 20th was the Saturday before Thanksgiving. It was a breezy sunny day with temperatures in the mid-40's.

It should also be noted that the University District Farmers Market is open year round. Other north end Farmers Markets (Wallingford, Lake City, Phinney, Meadowbrook, Lake Forest Park) are closed in the winter.

I. MARKET OVERVIEW:

- Organization:** Neighborhood Farmers Market Alliance
- Incorporation:** Non-profit, incorporated in WA State and federal 501(c)3
- Web address:** www.seattlefarmersmarkets.org
- Day & Hours:** Saturday, 9:00 am to 2:00 pm (5 hours per week)
- Season:** Year-round
- Location:** Outdoors on the playfield at University Heights Center – University Way and NE 50th
- Market Staff:** Chris Curtis, Director; Kira Doley, On-site Manager; 1.5 on-site assistants
- Market Opened:** 1993
- Vendors** The market has a capacity of 64 vendors.
On the day of the survey, there was a total of 52 vendors: 40 farmers and 12 processed food vendors (baked goods, pasta, preserves, etc)
- Vendor Mix:** 75% of the total vendor base is farmers – based on an annual average
25% of the vendor base is food processors; baked goods, artisan breads, preserves, pasta, etc.
There are no crafters, re-sellers, imported items, fast food (kettle corn or spun sugar), flea market or collectible items.

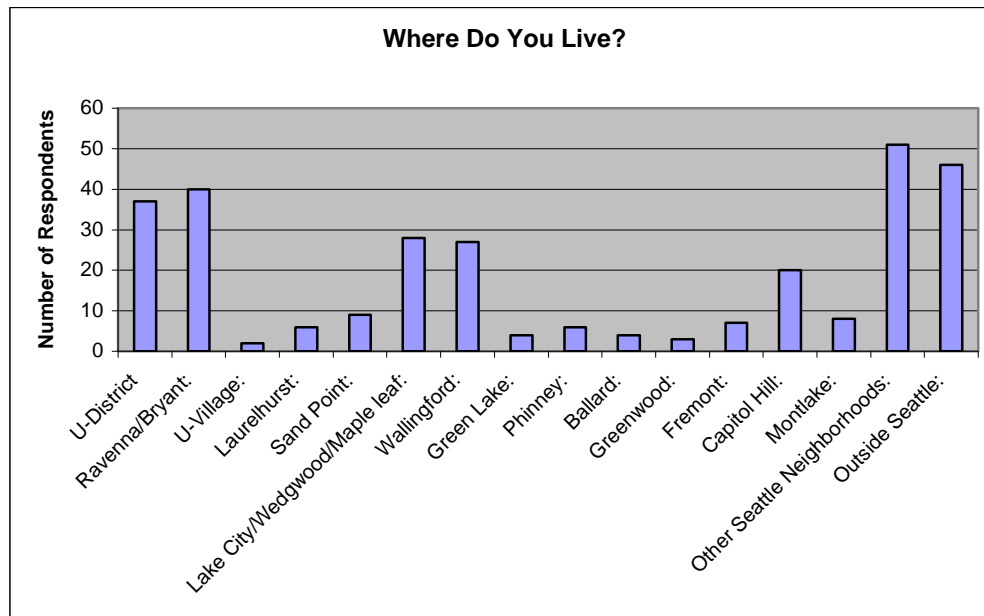
II. MAP SURVEY

The first question asked people to indicate where they lived by placing a dot on a map or in one of 14 categories plus Other Seattle neighborhood or Outside Seattle. The intention is to ascertain where customers are coming from and to help inform outreach efforts, problem-solve transportation issues, and target products to customers.

Where do you live?

U-District (Cowen Park south to Pacific, I-5 east to 21 st Ave.):	37	Phinney:	6
Ravenna/Bryant:	40	Greenwood:	3
Lake City/Wedgwood/Maple leaf:	28	Fremont:	7
U-Village:	2	Ballard:	4
Laurelhurst:	6	Capitol Hill:	20
Sand Point:	9	Montlake:	8
Wallingford:	27	Other Seattle Neighborhoods:	51
Green Lake:	4	Outside Seattle:	46

Graph 1. Residential location by number of responses



Map Survey results suggest:

- Neighborhood shoppers (12%) live within 1/2 of a mile from the market.
- Approximately 35% of shoppers came from adjacent neighborhoods within 2 miles. This suggests many people live within easy walking distance of the market.
- More than 15% of shoppers were from west of Interstate 5, including the Wallingford neighborhood.

- Many shoppers (15%) reported living outside of Seattle, which suggests that some of those surveyed consider the market a destination market and/or were visiting for the Thanksgiving holiday.

This market is one of the most successful markets in the city and attracts a strong base of customers both from nearby and from across the city.

III. DOT SURVEY QUESTIONS

Four dot survey questions were written on large flip-charts and were set up on easels within the market footprint. The survey team encouraged shoppers “to take part in a survey to help their market.” Each shopper was given six dots to indicate an answer for each question, the fourth being a two part question. The sheets were refreshed halfway through the survey. This was to minimize any response bias when answering the dot survey questions.

Approximately 330 people or about 10% of all adult shoppers were surveyed, though response rate varied slightly depending on the question.

Question 1. How often do you shop at this market?

Weekly:	218 (65%)
Once a month:	25
Two times a month:	55
1-2 times a season:	26
1 st visit:	5
Other:	1

Graph 2. Shopping Frequency by percentage



Question 1 results suggest:

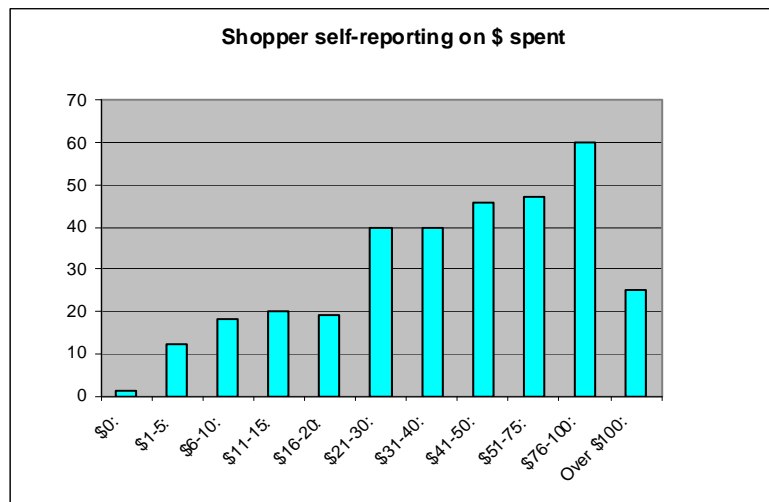
- The highest number of respondents (65%) were regular, weekly shoppers with 17% shopping every other week.

- Interestingly, only 2% reported that this was their first time to the market despite the high number of out of town visitors that day.
- The percent of tourists from outside of Seattle (15%) with the percent of shoppers from greater Seattle (17%) suggests that this market has a strong potential to draw in some new, regular shoppers from other neighborhoods, i.e. first time visitors are not all tourists, but potential new regular shoppers.

Thus, this market has a strong base of regular shoppers with a nice mix of new shoppers to possibly draw new regular shoppers from. One opportunity for growth is to convert some of the occasional visitors to regulars, and to reach out across the city.

Question 2. How much money will you spend today?

\$0:	1
\$1-5:	12
\$6-10:	18
\$11-15:	20
\$16-20:	19
\$21-30:	40
\$31-40:	40
\$41-50:	46
\$51-75:	47
\$76-100:	60
Over \$100:	25



Graph 3. Anticipated market spending by number of responses

Question 2 results suggest:

The second question asked people how much they were going to spend at the U-District Farmers Market. Respondents were given the set choice of answers, from \$0 to \$100 *plus*. A total of 328 people responded to this question.

- The average customer spending on November 20, 2010 was \$48.62¹
- Most (25%) customers reportedly spent between \$76 or over \$100 (*this may be much higher than usual due to the date being the Saturday before Thanksgiving*).
- Less than 1% reported not spending anything and 54 % reported spending over \$40.

Question 3. Will you shop elsewhere in the immediate business district (“The Ave”) today?

No:	53	Yes:	168
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If yes, how much will you spend?

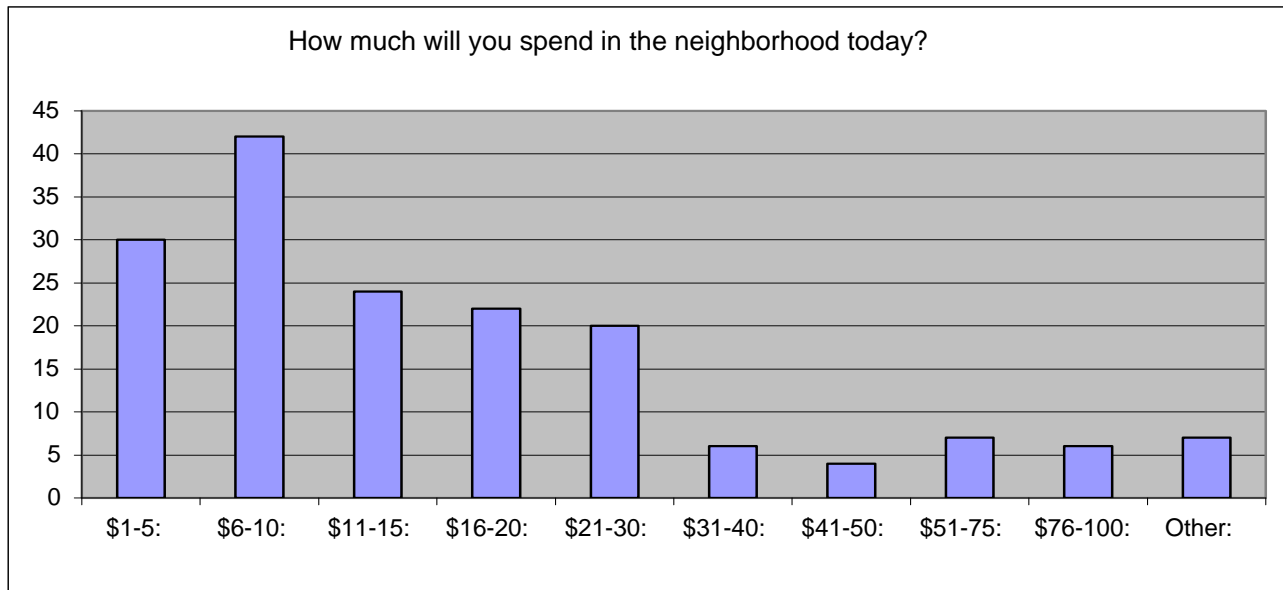
\$1-5:	30
\$6-10:	42

¹ To calculate the average customer spending, each dollar range was assigned the average value of the range. So, if someone responded \$6 to \$10, it was given an estimated value of \$8. “Over \$100” was assigned a value of \$101. The total value was then divided by the number of responses to get the average.

\$11-15:	24
\$16-20:	22
\$21-30:	20
\$31-40:	6
\$41-50:	4
\$51-75:	7
\$76-100:	6
Other:	7

Total = 168 or 76% of those surveyed will shop in the area.

Graph 4. Anticipated spending on “The Ave” by farmers market shoppers



Question 3 also asked shoppers about their spending habits, this time in terms of businesses, restaurants, or services in the immediate business corridor, known as The Ave. Respondents were given the same choices, from \$0 to \$100 and Other. A total of 225 people (or 76% of total shoppers) responded to this question.

IV. The Multiplier Effect

Question 3 results suggest:

- The largest group of shoppers (76%) reported they were planning to spend money at other businesses in the nearby shopping district. Farmers Markets are known to attract people to neighborhoods, and those shoppers then patronize local businesses (the “multiplier effect”)
- Approximately 2/3 of shoppers (61%) said they would spend between \$1 and \$26 at other businesses or restaurants; 13% planned to spend between \$30 and \$101 at other businesses or restaurants.
- The difference of 105 shoppers who answered other questions in the survey but not this one might suggest additional “no” responses, but adding those non-responses still yields a 50% multiplier effect.
- By using the same calculation method as Question 2, we get an average of \$22 spent by a minimum of 50% of shoppers, which represents a multiplier effect of \$34,529 on this particular Saturday. *For 2010, the effect is over \$1.5 million.*

The multiplier effect is an important measure of the economic benefits of neighborhood farmers markets. Not only are markets economically important to farmers but they also benefit other local businesses.

Question 4. What *other* Farmers Markets do you shop at over the course of a year?

West Seattle:	25	
Broadway:	32	
Columbia City:	21	
Magnolia:	1	
Phinney:	24	
Lake City:	48	(NFMA Markets in bold)
Ballard:	50	
Queen Anne:	17	
Wallingford:	51	
Madrona:	8	
Cascade:	1	
Meadowbrook:	13	
Pike Place:	63	
Other:	58	

