



Ann Arbor Farmers Market

Rapid Market Assessment Report

Saturday, August 20, 2016

Assessment Team:

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Introduction to this Rapid Market Assessment Report

A Rapid Market Assessment is an intensive, one-time market-day snapshot of a farmers market. This Rapid Market Assessment was organized and led by the Michigan Farmers Market Association (MIFMA) to use simple, tested methods to count market customers, survey customers using the dot survey technique, and compile market observations and recommendations. This report summarizes the data collected during the one-day assessment.

Rapid Market Assessments were developed by Larry Lev, Linda Brewer and Garry Stephenson of Oregon State University (see <http://smallfarms.oregonstate.edu/oregon-small-farms-technical-reports>) and have been adapted for use in Michigan.



MIFMA volunteers conducting the Rapid Market Assessment on Saturday, August 20, 2016

All photos in this document by Lindsey Scalera

Ann Arbor Farmers Market General Information

The Ann Arbor Farmers Market has been in existence now for 97 years. While it has not always operated in the same location, it has a vibrant history and strong foundation in the community. The farmers market is currently located in the Kerrytown district of Ann Arbor, Michigan, in a pavilion located at 315 Detroit Street. It is currently held on Wednesdays and Saturdays from 7 a.m. to 3 p.m. from May through December. During the months of January through April, the market is held on Saturdays only from 8 a.m. to 3 p.m.

The market is managed by the City of Ann Arbor under their Parks and Recreation Services Unit. Sarah DeWitt is the market manager and can be contacted at 734-794-6000, extension 42575.



The Ann Arbor Farmers Market on Saturday, August 20, 2016

Market Day Information for August 20, 2016

Weather: Temperatures in the mid-80s, a cool, overcast morning that transitioned into a hot, sunny afternoon

Number of Vendors Present: 77

Number of Community Partners Present: 1

Estimate of Farmers Market Sales: \$205,415

Estimate of Farmers Market Customer Attendance: 13,395 adults and 1,280 children

Attendance estimates were made by counting all adults and children entering the market during a specified 20-minute period, from 20 minutes after the hour to 20 minutes until each hour. Four team members were assigned to four entrances. Team members only counted shoppers entering the market during the specified time.

Table 1. Actual Customer Attendance Counts

	<u>Entering from the West, South of Middle Walkway</u>		<u>South Entrance</u>		<u>North Entrance</u>		<u>Entering from the West, North of Middle Walkway</u>	
	Adults	Children	Adults	Children	Adults	Children	Adults	Children
7:20AM-8:40AM	36	1	99	1	69	0	58	0
8:20AM-8:40AM	98	11	172	17	120	11	97	8
9:20AM-9:40AM	133	14	126	12	190	13	134	14
10:20AM-10:40AM	165	23	148	18	282	39	151	22
11:20AM-11:40AM	177	37	145	15	251	31	142	35
12:20PM-12:40PM	116	13	148	9	188	21	111	11
1:20PM-1:40PM	104	14	79	8	166	6	80	3
2:20PM-2:40PM	44	0	59	6	107	13	42	2

Dot Surveys

A dot survey is a simple data collection method in which five questions are posted on large posters. Market customers indicate their response to the survey questions using colorful, dot stickers – one “dot” or answer per question.

Question 1: How many ADULTS are in your shopping group today?					
	7:00 to 10:00	10:00 to 1:00	1:00 to 3:00	Total #	Total %
1	61	54	30	145	38.06%
2	93	92	20	205	53.81%
3	4	14	5	23	6.04%
4	5	3	0	8	2.10%
5	0	0	0	0	0.00%
6+	0	0	0	0	0.00%
Total	163	163	55	381	100.00%

On average, shopping groups included 1.7 adults. The most common response was 2 adults per shopping group. This data is the same data that was collected during the Rapid Market Assessment on February 27, 2016. This data is important, as it allows us to conservatively estimate market sales when combined with data collected on average market spending and estimated customer attendance.



Question 2: How much did you/will you spend at the Farmers Market today?					
	7:00 AM – 10:00 AM	10:00 AM – 12:00 PM	12:00 PM – 2:30 PM	Overall Total	Overall Percentage
\$0.00	1	4	1	6	1.60%
\$5.00	7	10	15	32	8.56%
\$10.00	8	17	7	32	8.56%
\$15.00	18	17	5	40	10.70%
\$20.00	26	29	9	64	17.11%
\$25.00	18	26	1	45	12.03%
\$30.00	22	17	6	45	12.03%
\$35.00	5	6	0	11	2.94%
\$40.00	22	16	2	40	10.70%
\$45.00	1	1	2	4	1.07%
\$50.00+	27	22	6	55	14.71%
Total	155	165	54	374	100%

On average, customers spent \$26.07 at the market on August 20, 2016. This is a higher amount than the \$19.94 average reported on February 27, which is likely due to the larger number of vendors present in August and the greater diversity of product available for purchase.

A conservative estimate of total market day sales is calculated by dividing the estimated total number of adult customers (13,395) by the average number of adults per shopping group (1.7) and then multiplying that number (7,879.41) by the average amount customers indicated they spent at the market that day (\$26.07). This method conservatively estimates total market day's sales of \$205,415.

Step 1: Divide the market count by the average shopping group size to estimate the number of shopping groups.

$$\frac{13,395 \text{ customer count}}{1.7 \text{ shoppers per group}} = 7,879.41 \text{ shopping groups}$$

Step 2: Multiply the number of shopping groups by the average purchase amount.

$$7,879.41 \text{ shopping groups} \times \$26.07 \text{ average purchase amount} = \sim \$205,415 \text{ estimated sales}$$

Question 3: How much did you/will you spend at other downtown businesses/restaurants today?					
	7:00 AM – 10:00 AM	10:00 AM – 12:00 PM	12:00 PM – 2:30 PM	Overall Total	Overall Percentage
\$ -	47	35	9	91	24.40%
\$5.00	22	11	3	36	9.65%
\$10.00	18	23	16	57	15.28%
\$15.00	6	13	4	23	6.17%
\$20.00	24	16	1	41	10.99%
\$25.00	7	12	10	29	7.77%
\$30.00	5	11	3	19	5.09%
\$35.00	3	4	2	9	2.41%
\$40.00	10	3	0	13	3.49%
\$45.00	1	3	0	4	1.07%
\$50.00	18	25	8	51	13.67%
Total	161	156	56	373	100%

Seventy-five percent of market shoppers also shopped at other downtown businesses or restaurants on the day of this assessment. On average, these customers spent \$18.16 at other downtown businesses and restaurants. The most frequently reported amount they spent at other downtown businesses or restaurants was \$10.

A conservative estimate of the total amount spent at other downtown businesses or restaurants is calculated by dividing 75% of the estimated total number of adult customers (10,045) by the average number of adults per shopping group (1.7) and then multiplying that number (5,905) by the average amount customers indicated they spent (\$18.16). This method conservatively estimates that customers spent \$107,230 at other downtown businesses or restaurants that day.

Question 4: How often do you shop at this market May through December?					
	7:00 AM - 10:00 AM	10:00 AM - 1:00 PM	1:00 PM - 3 PM	Overall Total	Overall Percentage
Weekly	85	52	22	159	41.51%
Twice a month	41	46	13	100	26.11%
Once a month	20	28	5	53	13.84%
Less than once a month	11	22	7	40	10.44%
This is my first time	5	18	8	31	8.09%
Total	86	154	102	352	100%

During the summer season, customers most commonly shop at the market every week (41%). The distribution of responses to this question is similar to what was reported by shoppers during the winter market on February 27, 2016.

Question5: What is the best way to share market news with you?					
	7:00 AM - 10:00 AM	10:00 AM - 1:00 PM	1:00 PM - 3 PM	Overall Total	Overall Percentage
Our website: a2gov.org/market	19	25	10	54	14.44%
Social media (Facebook & Twitter)	55	66	25	146	39.04%
Email	64	51	20	135	36.10%
Print	16	20	3	39	10.43%
Total	86	154	102	352	100%

Shoppers completing the dot survey prefer to receive news about the market through social media including Facebook and Twitter (39%) as well as by email (36%). The market may consider using these marketing strategies to link back to the website, a2gov.org/market, which is a preferred place to receive market news by 14% of shoppers. Only 10% of shoppers surveyed on August 20 indicated that they preferred print.



Constructive Comments and Observations

The Rapid Market Assessment team focused on market strengths and suggested changes and improvements for four key areas: physical characteristics, vendors and products, market atmosphere, and food assistance programs. The following comments were recorded throughout the day by the Rapid Market Assessment team based on their own observations and/or the comments provided to them by market shoppers and/or market vendors.

Physical Characteristics

Access to the Market Site

What is working well?

- There is good access for shoppers with many possible points of entry.
- The paved surface helps shoppers easily get into the market.

What could be improved?

- Assessors observed shoppers trying to enter between booths; entry points could be more clearly identified with signage.
- The busy market may be difficult to navigate for shoppers using a wheelchair.

Flow of People and Traffic

What is working well?

- The plaza-style setup helps traffic to flow easily.
- The market is wide enough to allow for traffic from both directions.
- Shoppers can sometimes cut across the market for easy access to desired stalls.
- There was a steady flow of shoppers throughout the market.

What could be improved?

- Entrances can get congested due to a high volume of shoppers.
- The walkways can feel tight at busy times.



Liability Issues

What is working well?

- No assessor comments in this category.

What could be improved?

- Shoppers bring their dogs with them into the market, even when signage indicates dogs are not allowed. If this is a market rule, it should be enforced by management.
- Some bird nests were observed on the rafters, which can pose a food safety risk.
- Not all organic vendors could verify that their produce was certified organic.
- Many tents set up outside the pavilion were not weighted. Tents blowing over onto customers or cars is the most common liability issue at farmers markets and one that can be easily fixed by requiring proper weights.



Organization of Market

What is working well?

- The current organization of the market utilizes space to its maximum capacity.

What could be improved?

- No assessor comments in this category.

Other Comments

- Parking was frustrating, but that is to be expected at such a busy market.
- The space could use more trash and recycling receptacles for shoppers and vendors.

Market Atmosphere

Market “Feel”

What is working well?

- The market’s atmosphere was nice and friendly.
- The feeling is very energetic.
- While the market is crowded, it doesn’t feel cramped.
- The market is vibrant and bustling.



What could be improved?

- No assessor comments in this category.

Shopper Demographics

What is working well?

- Shoppers seemed to be diverse.
- There appeared to be an even male-to-female shopper ratio.
- I saw good diversity, including Asian and Amish shoppers, as well as young, white shoppers.
- There was a good age mix, though older shoppers seemed more prevalent in the morning.
- I saw many young families with babies.
- The majority of shoppers were white and seemed to be well-educated; many weren’t fazed by spending \$100 or more (note: our survey only goes up to \$50).

What could be improved?

- The racial/ethnic mix does not fully reflect the diversity of Ann Arbor. This could improve with targeted outreach efforts.

Interactions and Conversations

What is working well?

- Interactions were generally very friendly.
- I observed lots of “meetings” and chats.
- Families and friends enjoyed being at the market together.
- I witnessed friendly conversations between shoppers.

What could be improved?

- More seating around the market with additional benches and picnic tables could help facilitate more interactions and shoppers staying at the market longer.

Educational and Community Activities

What is working well?

- The music at the market near the 5th & Kerrytown entrance provided nice ambience.
- I appreciated the partnership with Food Gatherers.

What could be improved?

- There didn't seem to be many activities for shoppers.
- There could be future opportunities for cooking demos, nutrition education, and children's activities.

Other Comments

- Attendance seemed to drop significantly around 1:00 PM; it felt like a different market.

Vendors and Products

Product Mix

What is working well?

- There was a good mix of products.
- I observed a balance between food and non-food items.
- Lots of organic vendors come to the market to sell.
- Shoppers appreciate the great abundance of farm-fresh, Michigan-grown fruits and vegetables.



What could be improved?

- No assessor comments in this category.

Product Quality

What is working well?

- I saw good quality products throughout the market.
- The produce looks great.
- High quality, beautiful products keep shoppers coming back.

What could be improved?

- No assessor comments in this category.



Signage

What is working well?

- Signage around the market was generally adequate.

What could be improved?

- Many vendors lacked visible signage indicating their farm name or the prices of their products.
- The market could use more signage indicating where and how to use food assistance programs.
- There was great opportunity for vendor signage on the poles, but this option was underutilized by vendors.
- I see a huge opportunity to enhance vendor signage so that basic information (like farm name and location) is clear. Also, more professional pricing signage could be encouraged or provided by the market.

Display

What is working well?

- Many vendors had lovely displays.
- I saw good displays throughout market.

What could be improved?

- There was opportunity for many vendors to enhance their displays with simple strategies such as tablecloths and better signage.



Customer Service

What is working well?

- Many vendors were standing and smiling, ready to serve.
- Vendors are kind and helpful.
- I observed good customer service.

What could be improved?

- One assessor viewed a vendor sleeping in the back of a truck.
- One assessor reported some vendors to be “unpleasant”.

Food Safety

What is working well?

- Most vendors had appropriate food storage.

What could be improved?

- A few vendors had samples that were not always kept cool. Samples should be kept at proper temperatures for food safety reasons (see MDARD’s Guidelines for Providing Safe Food Samples for more information at http://www.michigan.gov/documents/mda/MDA_FdSmpIngFarmMkts5-09_279110_7.pdf).
- Some vendors displayed fresh produce on the ground; consider asking vendors to move it off the ground to maintain produce quality and prevent bruising or cross-contamination.



Other Comments, Including Vendor Comments

- One vendor mentioned that he'd like to see market staff cooperating more directly with market vendors on social media promotion.
- One vendor complained about the new smoking ordinance that prohibits vendors from smoking but allows people to smoke cigars at the market for other special events.
- One customer commented that there have not been enough opportunities for the community to provide feedback about the new market building and that public comment sessions were hosted after the council members already made up their minds. He was asked to fill out a comment card so his ideas could be shared in his own words.

Food Assistance Programs

SNAP Program (EBT, Bridge Cards)

What is working well?

- No assessor comments in this category.

What could be improved?

- Signs advertising Bridge Card acceptance should face out to public entrances.

Double Up Food Bucks

What is working well?

- No assessor comments in this category.

What could be improved?

- Signage is displayed in the market's main office but not in many other places throughout the market.



Alternative Redemption Systems

What is working well?

- No assessor comments in this category.

What could be improved?

- The market could use better signage promoting alternative payment methods, as seen at other comparably-sized markets.
- Some vendors said that they don't accept food assistance benefits because it takes approximately one week for them to receive a check. While this is a standard practice for farmers markets, it was a concern for a few vendors.

Signage

What is working well?

- No assessor comments in this category

What could be improved?

- I saw very minimal signage around the market. There is a great opportunity to develop signage and a promotional campaign in 2017 for food assistance benefits.