



Ann Arbor Farmers Market

Rapid Market Assessment Report

Saturday, February 27, 2016

MIFMA Assessment Team:

- Chris Broadbent, *Board Member and Kalamazoo Farmers Market Manager*
- Julia Darnton, *Board Member and Downtown Saginaw Farmers Market Treasurer*
- Sydney Debien, *Food Access Coordinator*
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Introduction to 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 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.



Rapid Market Assessment team members, Sydney Debien and Julie Darton, recruit market shoppers to participate in the dot survey.

Ann Arbor Farmers Market 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 Saturdays from 8 a.m. to 3 p.m. from January through April. Additional seasonal hours include May through December on Saturdays and Wednesdays from 7 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 at extension 42575.



The Ann Arbor Farmers Market on Saturday, February 27, 2016, on the day of the Rapid Market Assessment.

Market Day Information for February 27, 2016

Weather: 34 degrees Fahrenheit – windy, but lots of sunshine

Number of Vendors Present: 29

Number of Community Partners Present: 0

Estimate of Farmers Market Sales: \$39,230

Estimate of Farmers Market Customer Attendance: 3,345 adults and 285 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 till 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
8:20AM-8:40AM	26	0	15	1	24	4	30	2
9:20AM-9:40AM	22	1	25	3	44	5	59	4
10:20AM-10:40AM	37	5	31	6	28	3	71	1
11:20AM-11:40AM	40	5	26	5	35	6	77	3
12:20PM-12:40PM	44	3	46	5	20	2	136	12
1:20PM-1:40PM	34	1	32	1	20	3	78	6
2:20PM-2:40PM	20	3	22	3	12	0	61	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?					
	8:00AM-10:00AM	10:00AM-12:00PM	12:00PM-2:30PM	Overall Total	Overall Percentage
1	43	65	27	135	39%
2	40	62	61	163	47%
3	5	18	15	38	11%
4	1	1	9	11	3%
5	0	0	0	0	0%
6+	0	0	0	0	0%
Total	89	146	112	347	100%

On average, shopping groups included 1.7 adults. The most common response was 2 adults per shopping group. 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?					
	8:00 AM – 10:00 AM	10:00 AM – 12:00 PM	12:00 PM – 2:30 PM	Overall Total	Overall Percentage
\$0.00	2	14	12	28	8%
\$5.00	19	18	18	55	15%
\$10.00	12	28	17	57	16%
\$15.00	10	12	12	34	10%
\$20.00	12	25	23	60	17%
\$25.00	6	13	11	30	8%
\$30.00	6	14	4	24	7%
\$35.00	4	1	5	10	3%
\$40.00	5	8	2	15	4%
\$45.00	3	1	1	5	1%
\$50.00+	11	13	14	38	11%
Total	90	147	119	356	100%

On average, customers spent \$19.94 at the market on February 27, 2016. A conservative estimate of total market day sales is calculated by dividing the estimated total number of adult customers (3,345) by the average number of adults per shopping group (1.7) and then multiplying that number (1967.65) by the average amount customers indicated they spent at the market that day (\$19.94). This method conservatively estimates total market day's sales of \$39,230.

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

$$\frac{3,345 \text{ customer count}}{1.7 \text{ shoppers per group}} = 1,967.65 \text{ shopping groups}$$

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

$$1,967.65 \text{ shopping groups} \times \$19.94 \text{ average purchase amount} = \sim\$39,230 \text{ estimated sales}$$

Question 3: How often do you shop at this Farmers Market in the winter season (January – April)?					
	8:00 AM - 10:00 AM	10:00 AM - 12:00 PM	12:00 PM - 2:30 PM	Overall Total	Overall Percentage
Weekly	59	64	25	148	41%
Twice a month	14	36	15	65	18%
Once a month	2	24	19	45	12%
Less than once a month	6	16	31	53	15%
This is my first time	5	24	22	51	14%
Total	86	154	102	352	100%

During the winter season, customers most commonly shop at the market every week (41%). On February 27, 2016, 14% of customers were first-time shoppers.

Question 4: What was the most important reason you came to the Farmers Market today?					
	8:00 AM - 10:00 AM	10:00 AM - 12:00 PM	12:00 PM - 2:30 PM	Overall Total	Overall Percentage
To purchase my grocery items for the week	27	38	10	75	20%
To purchase a specific item from a specific vendor	28	44	14	86	23%
To purchase items from local artisans	0	3	10	13	3%
To buy and eat food from a mobile food vendor	1	2	3	6	2%
To support Michigan farms and businesses	16	39	32	87	24%
For the atmosphere/experience	12	29	35	76	21%
Other	2	13	9	24	7%
Total	86	168	113	367	100%

The most common reasons that shoppers gave for attending the farmers market was to support Michigan farms and businesses (24%) and to purchase a specific item from a specific vendor (23%). Other common reasons for attending included the atmosphere or experience (21%) and to purchase grocery items for the week (20%). Results also show that early morning shoppers are more commonly driven by food item purchases while afternoon shoppers are more motivated by atmosphere and supporting Michigan farms and businesses.

Question 5: What do you think is the best way to get more people to shop at the winter Farmers Market?

	8:00 AM - 10:00 AM	10:00 AM - 12:00 PM	12:00 PM - 2:30 PM	Overall Total	Overall Percentage
Warmer four-season structure	37	79	47	163	46%
Different market hours	2	4	4	10	3%
Different product mix	4	13	14	31	8%
More promotion of the market	11	15	11	37	10%
More activities/entertainment	8	10	28	46	13%
Keep things the same	28	32	10	70	20%
Total	90	153	114	357	100%

Nearly half of all shoppers (46%), thought that providing a warmer four-season structure would be the best way to increase shopper attendance at the winter Farmers Market. In addition, 1 in every 5 shoppers suggested keeping things exactly the same.



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

What is working well?

Market Access

- Most people I observed walked to the market.
- There appear to be lots of different ways to access the market.
- There are many different entrances where customers can enter.
- Being located across from a shopping center is good for foot traffic because it allows people to easily enter the market from that nearby venue.



Flow of People and Traffic

- People moved quickly and efficiently through the market.
- There was a steady flow of people throughout the market hours.
- The market has a good layout that keeps people moving through the market.
- Good aisle spacing allows space for shopping as well as moving throughout the market.
- I liked the width of the walkways because it's great for strollers and people with disabilities.
- I observed good traffic for a winter market. I wasn't expecting to see that many shoppers because of the weather and shoppers' perceived lack of variety in products available at a winter market.

Liability Issues

- I appreciated seeing the market manager positively enforce the no dog rule with a customer.
- Having the steps painted yellow is a good best practice for mitigating tripping hazards.
- The nice, paved surfaces of the market aisles go a long way toward preventing liability issues.

Organization of Market (vendors, stalls, etc.)

- The layout was excellent, in my opinion.
- The layout seems effective and I like how it disperses the variety of products available.
- It appears that crafters are positioned on the edge of the market layout. Is this intentional or circumstantial?

- I think the market structure is very nice.
- I love the great bathrooms and that they are heated! This is a huge asset to market shoppers.
- I liked that there is an office where customers and vendors can go. The market creates a central location for distributing information, for processing food assistance benefits and for networking amongst shoppers and vendors.

What could be improved?

Market Access

- The market could have shoveled snow around the bike racks to make them more accessible.
- Parking for some vendors could be dangerous. Try assigning a spot for each vendor if possible.
- More signage for parking could be used to clearly identify where vendors and customers can park.
- More parking for customers would be ideal and/or greater emphasis on the website of public parking locations nearby the market.



Flow of People and Traffic

- There did not appear to be a gathering place for shopper interactions except the aisle. When shoppers did choose to congregate in the aisle, it blocked traffic.
- Travel around the market felt very car-oriented, despite parking being limited.

Liability Issues

- For food safety, it is recommended that birds and their nests be removed from the center peak of the pavilion.
- As the snow melted, it had the potential to fall on cars parked under the pavilion roof. This could present a liability issue.
- I saw multiple dogs throughout the market. Shoppers just walked by and ignored the signs posted.

Organization of Market (vendors, stalls, etc.)

- I did not observe any trashcans. Are there any available to shoppers that I missed?
- I feel like the market was organized into a nice, linear market for the day.

Other

- I observed vendors starting to leave earlier than the posted closing time of the market. This can be discouraging to shoppers who come at the end of the posted market times anticipating they will be able to shop from all vendors. Does the end time of the market need to be adjusted?

- Some customers and vendors are concerned about the installation of an enclosed structure because of logistics and loss of parking. The Rapid Market Assessment team estimates that one in every ten customers would offer feedback regarding the installation of a new structure. Of those that offered feedback, it is estimated that four out of every five shoppers were not in favor of adding a structure because of one of the following reasons: (1) they have heard that the planned structure will not hold all of the winter season vendors; (2) they are concerned that the structure will change the tradition or atmosphere of the market; or (3) while they were often in favor of the structure blocking the wind, they were concerned about the structure blocking the sunlight.
- At least two customers shared that they would like sides for the pavilion but would not be in favor of a new enclosed structure.
- Vendors would walk around and leave their spaces unattended, which made me concerned for the safety of their products and their cashbox but also for the potential loss of sales from shoppers who might pass by while their booth was unattended.
- Market staff were not visible within the market space often.
- More than one customer told me they would like a structure that blocks the wind but not the sunshine.
- More than one customer and vendor told me that a new structure needs to be easy for all vendors to get in.
- I heard from multiple (more than three) customers and/or vendors that a structure should have room for all winter vendors (not just some).
- More than one customer commented that they missed the music that the market features in the summer.

Vendors and Products

What is working well?

Product Mix

- I felt the product mix was great for the season.
- There was a lot of variety in the products that were offered.
- There seemed to be a good mix of products, especially for February.
- The number of vendors growing organically exceeded my expectations.
- The vendors offered a very good mix of products.

Product Quality

- The products I observed were very high quality.
- The product quality I observed was good.
- The quality of the value-added products in the market was very good.
- I appreciated seeing labels on the majority of products. That helps me when I am shopping, and I observed it being helpful to other shoppers in the market as well.

Signage

- Vendor signage is great.
- Farm signs are good.
- The signs that are present are nice.
- Most vendors had a business name posted at their booth. This is a best practice that I look for at markets and was used broadly in this market.
- Vendors displayed their business name well.



Display

- I love when vendors have eye-catching banners up behind the stall and I observed this at several booths in the market.
- Vendor displays were very well done.
- Great display of products out on the table for customers to see.

Customer Service

- Customer service seemed good to me. As an example, I saw one vendor refer a shopper to another vendor, which shows great vendor support and also excellent customer service.
- The customer service interactions I observed were great.
- I observed excellent customer service!
- The vendors were friendly and open to communicating and discussing their products with shoppers.

Other, Including Vendor Comments

- Vendors are very friendly with one another.
- The market had many young vendors, which I found surprising. The variety of different ages for the vendors was a welcome observation and bodes well for the longevity of the market, also speaking volumes for your market's ability to support new businesses.

What could be improved?

Product Mix

- Food trucks or prepared foods could be added!

Product Quality

- Some baked goods looked sad (meaning that the baked goods lacked originality and were not unique, packaging was unappealing, and generally had a feeling that a customer could easily make the same thing at home and there was no need to purchase from the vendor).

Signage

- More signs! You can never have too many. Additional signs could be added to label products and/or prices or to tell more of the vendor's story about their business and/or farm.
- Not all vendors have signage, but all should display signage at minimum with their business name and the prices for their products as a service to their customers.

Customer Service

- Some vendors walked away with no one left at the booth (this is a concern in regards to the safety of their products and their cashbox but also for the potential loss of sales from shoppers who might pass by while their booth was unattended).

Food Safety

- I observed improperly labeled Cottage Foods. See www.michigan.gov/cottagefood for labeling information.
- Safe Food Sampling Guidelines were not being followed by all farmers and vendors. Access these guidelines at www.michigan.gov/farmersmarkets.
- I observed meat vendors not using coolers and openly displaying meat on tables.
- Some value-added items I saw were not labeled at all (all processed food requires a label).
- One vendor expressed concerns about Cottage Food vendors, sharing that they felt Cottage Food production was unfair to licensed kitchens.

Other, Including Vendor Comments

- I did not observe a great deal of racial diversity amongst vendors.
- The artisan vendors at the market offered the most critiques regarding market management and structure. One vendor even had a printed letter outlining her suggestions that she offered to each person on the Rapid Market Assessment team.
- Vendors made it clear that they were aware a big project was going on to plan a new structure for a winter market. Some vendors (three-five) were a little aggressive about sharing their opinions and critiques.



Market Atmosphere

What is working well?

Market “Feel”

- The market feels bright and vibrant.
- I observed happy vendors and happy shoppers.
- The vendors were nice and friendly.
- The atmosphere of the market felt quiet but bustling.
- People appeared to enjoy their interactions with vendors.
- I observed very friendly vendors and customers.
- To me, the market atmosphere felt like it had renewed energy.
- Everyone is very friendly.



Shopper Demographics¹

- The shoppers I observed appeared to be mostly white with some of Asian ethnicity. The age range of shoppers appeared to be between 25 and 70 years old.
- Most of the shoppers I observed were white and affluent.
- After 10 a.m., the market was full of people of all ages, many with families.
- I observed a good mix of all ethnicities shopping at the market.
- Most shoppers I observed were white and somewhat older.
- Shoppers had a mix of all ages.
- Shoppers had a variety of ethnic backgrounds.

Interactions and Conversations

- The customer/vendor interactions I observed were mostly upbeat and lead me to believe many of the vendors had been with the market for a great deal of time.
- Shopper/vendor interactions seemed brief and purchase-focused.
- People were really friendly, passionate and invested in the market.
- Customers were happy people, and vendors were empathetic to their neighbors.
- Vendors seem to get along with each other and are also friendly with customers.

Other

- Several customers (more than five) wanted to have passionate conversations about the city and the limited parking options throughout the city.
- Vendors were friendly and helpful.

¹ These comments are based on subjective observations by team members and are recorded at different times throughout the market day.

What could be improved?

Market “Feel”

- Parking was the single most frequent complaint from shoppers.

Shopper Demographics

- I observed limited racial and socioeconomic diversity among shoppers.
- I can't tell if there is a mix of income levels shopping at this market, and SNAP is not prominently displayed or utilized by shoppers.
- I did not observe a huge mix in race/ethnicity of shoppers.

Interactions and Conversations

- One vendor said the attendance might be low due to lack of advertising/parking.

Educational and Entertainment Activities

- More than one customer commented that they miss the music of the summer which was not present at the market today.
- What does “chemical-free” mean? I saw this on a sign of one of the vendors.
- I didn't see any educational or entertainment activities, which I think is understandable for a winter market. That being said, I did see kids attending the market and do think some type of activity could be added for them.

Other

- Both vendors and shoppers were suspicious about the motives of conducting a dot survey and were concerned about how the results could be manipulated or used against the perceived vendor desires.
- I didn't find any bike racks available to shoppers. Are there any available, or could there be?
- I couldn't find any trashcans or recycling containers. If these are available, they are not very visible to customers, and if they are not available, they should be.



Food Assistance Programs

What is working well?

WIC Project FRESH

- Not in season and not applicable to this assessment

Senior Project FRESH/Market FRESH

- Not in season and not applicable to this assessment

SNAP Program (EBT, Bridge Cards)

- I did see customers using tokens.

Alternative Redemption Systems

- I saw one customer using credit/debit tokens.



What could be improved?

SNAP Program (EBT, Bridge Cards)

- No image of the Bridge Card being used on signage. From our experience, we know that using the Bridge Card image to communicate about the SNAP program is important because it is a very visual representation of the program which SNAP recipients identify with.
- More signs are needed at vendor booths and around the market that promote that the market and the vendors who accept SNAP.
- I saw a SNAP sign hidden in the office. In my opinion, the program is not visible enough in the marketplace.
- I saw no signage for SNAP customers (mentioned three times by assessment team).

Double Up Food Bucks

- I only saw one Double Up sign hidden in the office. In my opinion, the program is not visible enough in the marketplace, especially because the market is piloting year-round redemption of the program for the first time this year.
- I did not observe any signage or Double Up customers in the market (mentioned two times by assessment team).

Signage

- More food assistance signs are needed (mentioned two times by assessment team).
- I only saw one vendor with a sign.