

# Middlebury Farmers' Market Rapid Market Assessment Report

Middlebury, Vermont

September 9, 2006

On Saturday, September 9, 2006, two board members and the manager from the Capital City Farmers' Market in Montpelier visited the Middlebury Farmers' Market for a Rapid Market Assessment. We used three techniques to gain a perspective about the vendors and customers within the farmers' market: customer counts, customer dot questions, and team observations and comments. The study team consisted of:

Paul Betz, vegetable vendor and board member at large

Randy George, bread vendor and board president

Jessie Schmdit, market manager

We had additional volunteer help for the customer counts from Middlebury Farmers' Market vendors.

## I. Customer Counts

For the customer counts, team members stationed themselves at three locations covering the multiple sides of the market where customers can enter. They counted adults entering the market for the middle 10 minutes of each hour, e.g. from 9:25-9:35. Each 10-minute count was multiplied by six to obtain an estimate of customers entering the market each hour. For the last half hour of market, the count was done between 12:15-12:25, and the number was multiplied by 3.

A pre-count was done by walking through the market just prior to opening and counting all customers who were in the market prior to 9:00 a.m. This pre-count was added to the total counts for the three and a half market hours.

	Stone Building Sidewalk		Walking Bridge Sidewalk		Through cars from parking lot		-- Total --		
<b>9:00 – 10:00 a.m.</b>	102	11%	48	5%	78	8%	228	25%	
<b>10:00 – 11:00 a.m.</b>	126	14%	84	9%	60	7%	270	30%	
<b>11:00 – Noon</b>	138	15%	108	12%	54	6%	300	33%	
<b>Noon – 12:30 p.m.</b>	51	6%	27	3%	27	3%	105	12%	
<b>Total</b>	417	46%	267	30%	219	24%	903	100%	
<b>Pre-count</b>								37	
<b>Total Customer Count</b>								<b>940</b>	

We estimate a total of 940 customers entered the Middlebury Farmers' Market on September 9, 2006. Nearly half (46%) entered the market from the sidewalk closest to the Stone building. The sidewalk which connects to the walking bridge brought in 30% of the customers and the remaining 24% cut in through the parked cars. It is also interesting

to note that customers arrived fairly evenly throughout the market day—there was no specific rush hour. Yet, the increasing counts toward noon might portend good results if the market hours were to be extended later in the afternoon. In future counts, it may be interesting to count customers coming from the parking lot, via cutting through and the two adjoining sidewalks, and those customers walking to the market from the walking bridge and down the hill from the center of downtown Middlebury. The nearly 1-in-4 customers cutting through the parked cars and vending spaces may reflect customers not walking the full length of the market, which may limit sales. The market could consider barricading the parking lot side, perhaps with colored tape, to encourage customers to enter the market from one side or another.

## II. Customer Dot Questions

The customer dot questions consisted of intercepting as many customers as possible, handing them four colored dots, and asking them to place one dot on each of four large sheets of paper, each with a question and various potential answers. These sheets were set up on tripods in the central aisle of the market. At 10:45 a.m. we removed the full set of four sheets and began another clean set of sheets for customers entering during the second half of the market day. The numbers below reflect first-half, second-half and full totals for the given responses.

The number of customers that entered the market during the first one and three-quarter hours, 48% (plus an additional 4% already in the market at opening), equals almost exactly the percent of dot respondents to Q1 during that first half. Thus, early shoppers and later shoppers are equally represented in their dot responses.

Dividing the customer count of 940 by a conservative factor of 2.0 adults per shopping group, we estimate 470 shopping groups on this market day. We intercepted 327 individuals to respond to the dot questions – asking only one person per household to respond – for a response rate of 70% of all shopping groups.

### *Q1. Where do you live?*

N=327

Town	First Half	Second Half	Full Market Day
Middlebury	71 45%	40 24%	111 34%
Cornwall/Weybridge	32 20%	25 15%	57 17%
Out-of-State	12 8%	35 21%	47 14%
New Haven/Bristol/ Starksboro/Monkton	10 6%	13 8%	23 7%
Shoreham/Bridport	8 5%	13 8%	21 6%
E. Middlebury/ Salisbury/Leicester	9 6%	12 7%	21 6%
Ferrisburg/Panton/ Vergennes/Addison	4 3%	9 5%	13 4%
Goshen/Hancock/Ripton	4 3%	7 4%	11 3%
Middlebury College Student	1 1%	5 3%	6 2%

Whiting/Orwell	3	2%	4	2%	7	2%
Chittenden Co.	2	1%	3	2%	5	2%
Other VT County	1	1%	4	2%	5	2%
<b>ALL</b>	157	48%	170	52%	327	100%

Comment: One-in-six customers (17%) come from outside Vermont or from other Vermont counties, visitors potentially interested in value-added products or items for immediate consumption. While over one-third were Middlebury residents, the market is definitely a regional attraction, also indicated by the visit of a bike tour group (see Constructive Comments “Atmosphere” section).

Time Comment: Out-of-state visitors were significantly more represented among late shoppers (21%) than early shoppers (8%). By comparison, Middlebury residents shopped early; they were 45% of those responding during the first half of the market day while only 24% (one-quarter) of those responding between 10:45 and 12:30 p.m. Those coming from other towns came fairly consistently throughout the market day.

**Q2. How did you learn about the Middlebury Farmers’ Market?** N=314

	First Half		Second Half		Full Market Day	
Newspaper Ad	17	12%	6	4%	23	7%
Newspaper Article	1	1%	6	4%	7	2%
Radio	0	0%	0	0%	0	0%
Flyer/Bulletin	1	1%	3	1%	4	1%
TV	0	0%	0	0%	0	0%
Sign/Banner	18	12%	28	17%	46	15%
Poster	1	1%	1	1%	2	1%
Drove By	3	2%	2	1%	5	2%
Friend/Word-of-Mouth	88	61%	95	56%	183	58%
Walked By	16	11%	28	17%	44	14%
<b>ALL</b>	145	46%	169	54%	314	100%

Comment: This question caused many customers to smile as they explained that, they had been coming to the market for so long, they could no longer remember how they had first heard of it. In these circumstances the dot questioners encouraged customers to place a dot which indicated how they heard of the market opening date each year or saw special events advertised. However, far ahead among a field of ten choices, “Friend/Word-of-Mouth” was the primary way people learned of the market, this also being the default category for veteran customers.

The other two that showed significant numbers were “Walk By/Drive By,” at 1-in-6 customers, and “Sign/Banner” with about the same response. This may indicate that for people who do not already know of the market, this signage is key.

Time comment: The differences here indicate that early shoppers tended to already know of the market, where later shoppers were slightly more likely to have just walked by or seen a sign or banner which encouraged them to come to the market. This makes sense given the stronger response from visitors in the second half of the market day [Q1].

**Q3. How much have you/will you spend at Marble Works Businesses?**

While included among the four RMA dot questions for market-goers, this question was not reviewed. There was much confusion among customers as to who the “Marble Works Businesses” were: many customers assumed “farmers’ market vendors” and put down the amount they spent at the market; others were unaware that businesses in the Marble Works complex were open; some noted typical expenditures at the businesses (e.g., prescriptions at the drug store) but not what they spent on market day. We tried adding the words “today” and “adjacent businesses” to clarify on the second round of questions but by that time it was too late. If the Middlebury market would like to try this question again, they might try wording it: “How much will you spend today at adjacent Marble Works businesses, not including what you have spent at the farmers’ market?”

The considerable confusion around this question demonstrates that Marble Works businesses could heighten their efforts to announce their presence (since Saturday is an obvious shopping day), even vending prepared foods if market rules allow.

**Q4. What is your primary reason for visiting the Middlebury Farmers’ Market?**

N=347

	First Half		Second Half		Full Market Day	
Vegetables/Fruit	112	67%	92	51%	204	59%
Meat/Poultry/Eggs	5	3%	7	4%	12	3%
Cheese	16	10%	15	8%	31	9%
Baked Goods	17	10%	12	7%	29	8%
Prepared Foods	2	1%	8	4%	10	3%
Crafts	4	2%	10	6%	14	4%
Special Events	0	0%	0	0%	0	0%
Atmosphere/Socializing	12	7%	35	20%	47	14%
<b>ALL</b>	<b>168</b>	<b>48%</b>	<b>179</b>	<b>52%</b>	<b>347</b>	<b>100%</b>

Comment: Three-fifths (59%) of respondents said that vegetables and fruits were the primary motivation bringing them to the market. Notable but far behind were cheese at 9% and baked goods at 8%, but one-in seven customers (14%) came for the atmosphere and socializing.

Numerous people said it was very difficult to choose, some resorting to tearing their dots in half (8) or using extra dots to answer this question rather than answering all of the other questions. Many customers said, “all of it,” and indicated that variety was very important. Others said they come to the market for different things during the

season, such as seedlings and plants in the spring. Five customers wrote on their dots “cut flowers” and put them under the “veg/fruit” category, and one respondent wrote “organic”.

The “Special Events” category received no dots. Customers typically commented that “There is no special event today” or “Does the market do special events?” This question might best be asked when the market holds a special event.

Time Comment: Second-half shoppers were much more likely to indicate that they were at the market for socializing, again a reflection on passersby or visitors. There also was a slight increase in the desire for prepared foods and crafts during the second half. If this indicates what customers are looking for later in the day, the market could encourage this atmosphere with music, special events, picnic tables, and more prepared foods.

Note: Since customers were encouraged to begin with Q1, it is probable that about 6% saved one of their dots from Q2 or Q3, which they chose not to answer, and used it to place an extra dot on Q4, resulting in 347 responses.

### **III. Constructive Comments and Observations**

Each team member evaluated the market independently, writing observations on a form about three basic areas of market operation: market atmosphere, physical characteristics, and vendors and products. Their collective comments are presented here. The thoughts of one participant may differ substantially from those of another; together they hopefully provide a truer reflection of the sentiments of customers with varying experiences seeing the market with different eyes.

#### **Market Atmosphere**

What was appreciated:

1. Nice to see all ages—lots of older folks and babies.
2. Relaxed feel, not very rushed.
3. Lots of customers indicated they have been coming for a long time—loyal crowd.
4. Lots of people walking around in pairs, congregating to shop.
5. Localvore info.
6. Dogs
7. Vendors chatting with customers, out in front, friendly.
8. Relaxed people, seeing each other
9. A big group stopped as part of an organized bike tour. The market was a designated stop. Would it be good to network with the tour companies?
10. Customers appreciate diversity.

Atmosphere Improvements:

1. No stuff for kids or kids play area.
2. Seems kind of quiet, could use some music, invite buskers to market?
3. Picnic tables set outside of market space, not encouraging people to sit down and enjoy the market space/food.
4. Any way to open up the view to the beautiful falls?

5. No real reason to hang out at the market.
6. Some customers mentioned they wanted earlier hours.
7. Music would be nice.

## **Physical Characteristics**

### What was appreciated:

1. Customers can get in and out quickly—lots of entry points and parking.
2. Nice close feeling between vendors, not too far apart.
3. Varied colored canopies looks nice.
4. Good buffer from the parking lot.
5. Shoppers flow-fluent.
6. Wider on east side, seems less crowded than west side.
7. Easy flow of customers up one side and down the other.
8. Nice walk to market from town—sidewalks and walking bridge.
9. Nice being close to falls, scenic.

### Physical Improvements:

1. Picnic tables or place for people to sit and visit at the market would be good.
2. Parking lot full, no spaces left.
3. No anchor/pull vendor on other side of sidewalk (near stone building), feels disconnected.
4. Backdrops behind vendor tents to hide vehicles and provide a boundary to the space might be good.
5. Sign on Printers Alley hard to see from street if driving by.
6. Banner over Main St or sign at intersection of Merchants Row and Main St would be good.
7. Sign on the green by the walkway over the falls would be good.
8. A space where the market promotes itself?
9. Could try moving market to the green by the building in a circle which encompasses the sidewalk, would give better visibility from the road above, looking down from the center of town.
10. Definitely busier at the east side of the market—there is also more room here. Maybe if cars were off the grass, the space could be wider—less cramped. All the big veggie growers seem to be on this end as well. Maybe move some of them to the other end to draw folks down.
11. Vendor cars detract. Without cars, could you fit a middle row of vendors?
12. Need more signs around town.
13. Sign at the downtown entrance?
14. Kids climbing on giant piece of granite. Liability?

## **Vendors and Products**

### What was appreciated:

1. Lots of dot participants debating between cheese and veggies as primary draw, great cheese variety!
2. Lots of sampling
3. Maple Wind lots of signs, pictures, info

4. Foggy Meadow nice display, product up high, pictures, banner, burlap covering tables down to ground
5. Good variety of produce, crafts, meat, cheese, etc.
6. Good to see so much cheese—lots of cows in Addison County
7. Some very clear and unique hand-crafted signs
8. One customer wished for a winter market.
9. Lots of farm vendors.
10. Apples.
11. Interesting varieties and options for produce.
12. Vendors ready when market began.

Vendor Improvements:

1. Quality of signage varied depending on vendor.
2. Many vendors with no signs saying who they are, price signs absent or very small.
3. Some displays look sparse.
4. Produce being displayed in plastic crates, cardboard boxes, convenient for vendor but not very attractive to customer.
5. Crafters could have pictures on their creation process or info.
6. Any organic or “natural” products? Not advertised.
7. Need more prepared foods.
8. Very few signs of business names.
9. Seems some displays could benefit from some presentation work.
10. Vendors sitting down, doesn’t draw customers.
11. Seems like there are a lot of vendors with one specialty and then a few squash and tomatoes on the side. Seems to devalue the produce a little bit.
12. Market logo bags should be sold at more stands.
13. Most farms need better signs.
14. No gloves on vendors handling cheese.
15. On a walk through saw 3 booths with no vendor/seller.
15. Seems like the “come at will” policy would be hard to work with. I would look at restructuring with a full season price to be a better deal, so you know what the budget would be. Would make for easier planning, budgeting. A seniority point system would help with determining vendor space issues as well.

## **Comments for Future Research**

Based on the difficulty customers had responding to Q4, it might be interesting to ask customers what they would like to see *more of* at the market. Also, as mentioned under the customer count section, counting customers approaching the market from the parking lot versus walking in from town or the falls could give the market some valuable information.