

Capital City Farmers Market

Rapid Market Analysis

Montpelier, Vermont

August 12, 2006

On Saturday, August 12, 2006, a team of Vermont managers, farmers and agricultural professionals conducted a study of the Capital City Farmers' Market in Montpelier, Vermont. We used a three-element process 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:

Jillian Abraham, Shelburne/Charlotte/Burlington
 Hally Anderson, Bellows Falls Farmers' Market
 Vance Corum, Farmers' Markets America
 Scott Greene, Middlebury Farmers' Market
 Bay Hammond, Middlebury Farmers' Market
 John Hayden, Smugglers Notch Farmers' Market
 Beth Holtzman, University of Vermont Women's Agricultural Network
 Jim & Kate Robinson, Hidden Meadows Farm
 Fred Schmidt, University of Vermont Rural Studies Center
 Barbara & Ken Tonnesen, Granite Center Farmers' Market

I. Customer Counts

For the customer counts, team members stationed themselves at three locations covering the two 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.

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 four market hours.

	State Street		Back Stairs		Dirt Path		-- Total --	
9:00 – 10:00 a.m.	348	13%	114	4%	54	2%	516	19%
10:00 – 11:00 a.m.	522	19%	198	7%	42	2%	762	27%
11:00 – Noon	522	19%	216	8%	42	2%	780	28%
Noon – 1:00 p.m.	540	19%	102	4%	66	2%	708	26%
Total	1932	70%	630	23%	204	7%	2776	100%
Pre-count							56	
Total Customer Count							2832	

We estimate a total of 2832 customers entered the Capital City Market on August 12, 2006. Seven-in-ten customers (70%) entered the market off State Street and the remaining 30% entered from the parking lot side, mostly using the cement stairway. While close, convenient parking is generally important, the small number entering from that side may indicate customers' lack of awareness of parking, insufficient parking in that lot substantial availability of other parking opportunities downtown, and/or pedestrian shopper access being mainly from the State Street entrance.

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 11:00 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.

While 46% of customers entered the market during the first two hours (plus an additional 2% already in the market at opening), 53% of dot respondents were early shoppers [Q1]. Thus, early shoppers are somewhat over-represented in their dot responses. Later shoppers were somewhat less likely to participate in the dot process, preferring to simply shop or enjoy the day.

Dividing the customer count of 2832 by a conservative factor of 2.0 adults per shopping group, we estimate 1416 shopping groups on this market day. We intercepted 729 individuals to respond to the dot questions – asking only one person per household to respond – for a response rate of 51% of all shopping groups.

Q1. Where do you live?

N=729

Zip (town) pop.	First Half		Second Half		Full Market Day	
Montpelier 12,223	185	25%	163	22%	348	48%
05640 (Adamant) 48	4	1%	2	0%	6	1%
05641 (Barre) 17,239	23	3%	18	2%	41	6%
05650 (E. Calais) 853	6	1%	4	1%	10	1%
05651 (E. Montpelier) 1,469	7	1%	4	1%	11	2%
05654 (Graniteville) 1,248	0	0%	0	0%	0	0%
05660 (Moretown) 1,339	2	0%	4	1%	6	1%
05663 (Northfield) 6,156	7	1%	4	1%	11	2%
05664 (Northfield Falls) 405	0	0%	0	0%	0	0%
05666 (N. Montpelier) 80	1	0%	0	0%	1	0%
05667 (Plainfield) 2,434	17	2%	10	1%	27	4%
05670 (S. Barre)	0	0%	3	0%	3	0%

05682 (Worcester) 1,178	9	1%	14	2%	23	3%
Other Washington Co. 14,041	30	4%	37	5%	67	9%
Lamoille Co. 23,233	4	1%	3	0%	7	1%
Caledonia Co. 29,702	1	0%	5	1%	6	1%
Chittenden Co. 146,571	10	1%	11	2%	21	3%
Orange Co. 28,226	11	2%	6	1%	17	2%
Other VT County	1	0%	5	1%	6	1%
Out-of-State	70	10%	48	7%	118	16%
ALL	388	53%	341	47%	729	100%

Comment: A notable one-in-six customers (16%) come from outside Vermont and 8% from other Vermont counties, visitors potentially interested in value-added products or items for immediate consumption. Three-quarters (76%) are Washington County residents; almost half (48%) are very local, Montpelier residents. The named Washington county communities (outside Montpelier) yielded 19% of customers while other unnamed communities in the county provided 9% of customers.

Time Comment: Out-of-state visitors were slightly more represented among early shoppers than late shoppers by a margin of 18% to 14% (10% and 7% of total shoppers). By comparison, Montpelier residents were consistently 48% of those responding (25% and 22% of the total) during each half of the market day. Those coming from other Vermont counties tended to come later in the market day.

Q2. How much will you spend at downtown businesses, including restaurants, in conjunction with your visit to the Farmers' Market today?

N=704

	First Half			Second Half			Full Market Day		
	# Cust.	% Cust.	\$ Spent	# Cust.	% Cust.	\$ Spent	# Cust.	% Cust.	\$ Spent
\$0	40	11%	\$ -	25	8%	\$ -	65	9%	\$ -
\$5	37	10%	\$ 185	45	14%	\$ 225	82	12%	\$ 410
\$10	53	14%	\$ 530	41	12%	\$ 410	94	13%	\$ 940
\$15	29	8%	\$ 435	25	8%	\$ 375	54	8%	\$ 810
\$20	45	12%	\$ 900	36	11%	\$ 720	81	12%	\$ 1,620
\$25	31	8%	\$ 775	33	10%	\$ 825	64	9%	\$ 1,600
\$30	44	12%	\$ 1,320	39	12%	\$ 1,170	83	12%	\$ 2,490
\$40	45	12%	\$ 1,800	33	10%	\$ 1,320	78	11%	\$ 3,120
\$50	1	0%	\$ 50	0	0%	\$ -	1	0%	\$ 50
\$60	16	4%	\$ 960	18	5%	\$ 1,080	34	5%	\$ 2,040
\$70	0	0%	\$ -	2	1%	\$ 140	2	0%	\$ 140
\$80	5	1%	\$ 400	10	3%	\$ 800	15	2%	\$ 1,200
\$100	26	7%	\$ 2,600	25	8%	\$ 2,500	51	7%	\$ 5,100
Total	372	100%	\$ 9,955	332	100%	\$ 9,565	704	100%	\$19,520

Avg. \$	\$ 26.76	\$ 28.81	\$ 27.73
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Comment: The average customer on August 12 estimated they will spend \$27.73 in downtown businesses when coming to the farmers' market.

One-third (34%) will spend \$10 or less downtown, another 28% will spend \$15 to \$25, and 38% will spend \$30 or more downtown when visiting the farmers' market.

We can estimate substantial economic impact of farmers' market shoppers on downtown businesses. If we divide the customer count of 2832 by a conservative factor of 2.0 adults per shopping group, we arrive at 1416 shopping groups who estimate downtown purchases at \$27.73 on average, creating a benefit of \$39,265 in downtown sales [2832/2 x \$27.73 = \$39,265].

Time Comment: Later shoppers estimate spending about \$2 more than early shoppers. This corresponds with other studies indicating that early-bird farmers' market shoppers may be somewhat more inclined to shop only at the market than later shoppers who may be oriented slightly more to other than food purchases.

Q3. If our Farmers' Market were to change location, what site would you most prefer?

N=698

	First Half		Second Half		Full Market Day	
State Capital	216	58%	204	63%	420	60%
State betw. Main & Elm	25	7%	31	10%	56	8%
Montpelier High School	14	4%	16	5%	30	4%
Mont. Rec. Fields (Rt. 12N)	3	1%	1	0%	4	1%
Parking lot behind City Hall	17	5%	7	2%	24	3%
Barre St. field across f. Sabine's	2	1%	2	1%	4	1%
No Preference	86	23%	44	13%	130	19%
Other (write on dot)	9	2%	21	6%	30	4%
	372	100%	326	100%	698	100%

Comment: This question caused some concern among shoppers, who were not aware that the current market site may be developed; researchers explained the probable need for relocation within the next two years. Far ahead among a field of eight choices, the State Capital drew the nod from three-fifths (60%) of all customers, or 74% of those with an opinion (not counting those with "no preference").

Other suggestions included Langdon Street, the Elm Street ballfield and Stone Cutters Way.

Time comments: The only significant difference was that early shoppers tended to be considerably more likely to have no preference for an alternative location, presumably

because they were focused on shopping, may see the need for another site as a distant need or were out-of-state visitors without any opinion.

Q4. What was your primary reason for coming to Montpelier today?

N=773

	First Half		Second Half		Full Market Day	
Farmers market	262	63%	245	68%	507	66%
Shopping	28	7%	44	12%	72	9%
Socializing	29	7%	22	6%	51	7%
Sight Seeing	24	6%	13	4%	37	5%
State Capitol	0	0%	0	0%	0	0%
Restaurant	8	2%	7	2%	15	2%
Work	9	2%	4	1%	13	2%
Other	55	13%	23	6%	78	10%
	415	100%	358	100%	773	100%

Comment: Two-thirds (66%) of respondents said that the farmers’ market was the primary motivation bringing them to Montpelier. Given that several people made note under “other” that they live in Montpelier, the question should have asked the reason for coming to “downtown” Montpelier, and the number may have been even higher.

The remaining one-third of customers came to Montpelier for a variety of social/entertainment reasons generally. To the extent that the market is a friendly and entertaining social event, it can play a positive, reinforcing role in encouraging locals and tourists alike to return on a regular basis.

Time Comment: Second-half shoppers were somewhat more inclined to be in Montpelier primarily for the farmers’ market (68% vs. 63% of first-half shoppers) or for general shopping (12% vs. 7% of earlier shoppers). First-half shoppers were more inclined to have “other” reasons for coming downtown (13% vs. 7% of later shoppers).

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 773 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. Perfect day! At 9:50 shoppers seemed focused on shopping.
2. Overall hoppin' atmosphere – lots of hustle & bustle
3. Friendly atmosphere; colorful displays; social commerce
4. Friendly
5. Very friendly feel to the market – lots of conversations; vendors on the whole are engaging and friendly.
6. Dog friendly
7. Mime and clarinet player at entrance – encourage more musicians
8. Performance artists
9. Music good – packed at 10:10 a.m.
10. Music tent – play earlier!
11. Very busy, customers buying, sales look good.
12. Busy – lots of traffic today!
13. Very social atmosphere
14. Friends running into each other
15. Lots of smiles and laughter, people eating
16. Sense of community between and among vendors and shoppers
17. Friendly folks/conversations
18. Overheard conversations were of community music events, friend BBQs and picnics, co-workers greeting each other and introducing families
19. Lots of families – young children, parents, grandparents. This is great!
20. Great opportunity for elderly to socialize
21. Many ages represented
22. Shoppers of varied ages
23. Regulars who bring their own baskets and bags
24. Montpelier to Thailand project
25. Vermont Farm to Family Program signs at participating vendors
26. The buildings do lend a “cozy” feeling.

Atmosphere Improvements:

1. Even though the shoppers are friendly feeling, the pavement and surrounding buildings aren't promoting a warm feeling. Need some grass. I think the buildings also take away from the “colorfulness” of the market.
2. Given the beautiful buildings of downtown Montpelier, it's a shame that the market seems stuck “behind” them in a parking lot. Adding some banners, making a hot-foods eating area, creating a kids-art scene and other ideas generated by local citizens could help enliven the lot and minimize the hard asphalt feeling.
3. Most people are looking, not buying.
4. Kids' activities (face painting, animals, etc.) would add festive atmosphere.
5. Could use something for kids to do.
6. No localvore recognition or “Eat local Vermont month”

7. Market assessment seemed distracting.
8. Who is performance artist – advertise?
9. Need sign for performance artists and more of them, whether dance or art.
10. Give some face to the farmers market committee that Jessie works for – erect a board with a simple description of the org, the leaders, a contact person, etc. promoting the organization that holds the whole thing together. Maybe a pamphlet describing how vendors are selected, efforts to keep a balance between farm products and crafts, some list of members and some observations giving a feeling of momentum - forward...
11. No local food education tent
12. Educational material should be available.
13. Growth, more diversity. A suggestion box or comment clipboard might provide for citizen feedback, making them feel more a part of the activity rather than outsiders. After all, this is the MONTPELIER market, and a closer promotion of the market with town, civic structure and the idea that these aren't just hard working farmers trying to make a buck but fellow citizens making a major contribution to the quality of life and choice and activity and culture of this town MONTPELIER. It was great to run into our Secretary of State and her family there - not politicking but buying real food. So I'm going to wrestle with more ways of tying these invaluable markets to the very fiber of quality communities.

Physical Characteristics

What was appreciated:

1. Key vendor at end of cul-de-sac helped get people to go to that end
2. Cul-de-sac rotation of customers
3. Central location very important to elderly without ready access to transportation
4. Good access from street and close parking
5. Shopper flow – able to do good loop around market
6. Flow of traffic with central, wide aisle
7. Flow is nice; easy to see and access all vendors
8. I was automatically guided from one side of the market to the other as I walked through.
9. Good organization and mix of vendors
10. Nice space and vendor layout
11. Couple vendors in middle break up flow
12. I liked the table and other activities in the middle. It made things feel less store-oriented and more social.
13. Neat & clean
14. Great route for people to walk
15. No vehicles in market
16. Picnic tables – more even better?
17. Picnic tables and umbrellas

Physical Improvements:

1. Parking seems tough
2. No room; limited room for expansion.

3. Gateway/opening to market was sparse and market pushed into back – are those parking spots important? I'd move the market forward to attract impulse shoppers.
4. Not enough upfront presentation on street edge
5. Walking through parking lot – not open to city for visibility, liability with cars backing up, people are not pushed through, it's too easy for passersby to miss
6. One sign unprofessional at the State Street entrance, compared to professional sign across from it
7. State Street entrance vendors are weak
8. Walking from State Street through parking lot to get to the market – visibility, safety, esthetics and access
9. Welcoming entrances. More aggressive signage would address the market invisibility from State Street, but all three back entrances (two directly off the parking lot and one via the parking lot coming off the pedestrian bridge) were woefully under identified. I'd think a permanent bower or entry "arch" providing week and maybe season long advertising could be erected on the eastern edge of the huge public parking lot and, without much effort a user-friendly welcoming ramp be constructed not only easing but drawing people in from the back lot. Given the freedom of parking in that lot on the weekends, it would seem natural to try to enhance the second entrance in this back area. I almost felt like a thief, sneaking into the market from the corner, and entering via a slot between two stands. Why not set up a welcoming row of stands along that slight incline and really make this a grand entrance - there are probably lots of local obstacles that the committee has struggled with back there.
10. Having other sellers (who are NOT part of the market) on the sidewalk and the parking lot detracts from the farmers' market and confuses where it begins.
11. Need wider venue – congestion at times reduced vendor exposure
12. Signage at entrance and before could be improved – banners, etc. to make market more welcoming and defined.
13. People walk through empty vendor space
14. Additional seating would increase sales by food vendors – benches and tables to the side
15. Need more picnic tables – always in use with food vendors
16. Decrease litter with additional trash receptacles
17. Too great a disconnect between vendors & artisans
18. Bicycles in market impede traffic flow – add bike rack
19. Rainy weather could cause flooding issues
20. Open exposure – wind challenges
21. Elderly and handicapped access
22. Access from parking lot behind church is not easy for strollers, elderly, etc.
23. Access from parking lot is a sloping, grassy hill – perhaps need handicap-accessible ramp or new stairs
24. Keep the market kid friendly, but elders were ignored. I saw no wheel chairs or even people on walkers, surprising in an urban center with such population density. One reason might be that both paths leading to the market from the back parking lot were graveled, and had a slight pitch to them with no guardrails. Neither path looked particularly friendly to disabled. (Presumably any disabled person would park as close as they could, i.e. the back lot).

25. The pavement in the market was real rough in some spots, not user friendly. So, keep in mind the elderly population, a population with a taste for small purchases of fresh vegetables, items for their grandsons, and, by the way a demographic cohort that will only increase in size as time goes by. (Of course kid-friendly markets are also appealing to most elders.)
26. An entertainment and eating area at the back of the market might be nice, allowing an expanded base of 6-8 hot food vendors to be a buffer between other vendors and a stage/bandshell deep in the parking lot.

Vendors and Products

What was appreciated:

1. Good mix of veggies, meats, baked goods and crafts
2. Good mix of ag products – produce, meat, cheese, poultry, fiber
3. Good variety
4. Good to see so many producer vendors
5. Friendly, helpful vendors
6. Good mix of vendors
7. The variety was nice; something for everyone.
8. Vendors are very present, on their feet
9. Vendors happy and engaging
10. Friendly customers, variety of goods, variety in sales.
11. Bulk, individual packaging
12. Good quality
13. Vendors display well – clean, good signage, lots of color
14. Most displays are good
15. Some great signage, redundance
16. Range of prices for similar items
17. The vegetable farms had clear and easy-to-access tables, but they felt very uniform and similar to each other (not sure why)

Vendor Improvements:

1. Quality of signage varied depending on vendor
2. Some vendor signs hard to distinguish – poorly placed/too small/nondescript
3. Several vendors with no sign (flowers, soaps, veggies, woodcrafts, etc.)
4. Vendor signage was challenging. Some signs and prices were nicely displayed while others were either non-existent or hard to find. I definitely found myself drawn to vendors with colorful, clear signs.
5. Those coming from other Vermont counties tended to come later.
6. Vendors might benefit from having signs perpendicular to their booths, sticking out into the aisle above customers' heads.
7. Could use more flower vendors
8. Couple of places where one booth flowed into the next – unclear whose product
9. More cheese please
10. Need dairy
11. More cheese and beverages other than soda; water cooler
12. All vendors should follow what many of the ma-and-pa stores do in terms of providing a few, cheap, impulse buying type items. Even single carrot sticks for a

- dime or a fat radish for a quarter would draw more people in and give the folks just eyeballing the place a way to assuage their guilt by buying just a little something to snack and satisfying their urge to celebrate the hard work of these vendors. These items might tie up valuable sales space but would affect only the busy high volume vendors, and even they have slow times at the beginning and at the end. To sum, more small items or single (non-bunched, or in smaller packages) opportunities to buy small amounts.
13. Given the critical importance of "tiered" display, I'm wondering if some entrepreneur could develop a standard set of maybe three sized boxes and either sell them to vendors or rent them at each market. Probably one ideal type would be the size of a standard plastic milk box (strong, light weight and virtually indestructible). They would take storage place, but I'd think you could get them onto a flat bed trailer and have them available pre-market, and haul them off afterward, each vendor stacking theirs on the flat bed. If I can ever retire, I might even go into such a business- given the phenomenal growth in Vermont's Farmers Markets - 49 this season alone!!
 14. If the vendor number were doubled – providing more variety and more competition – customers would be pleased with the change and spread the word even farther, increasing the market size and sales exponentially.

Comments for Future Research

1. Q1, related to where people live, might be analyzed for potential regrouping of zip codes and addition of others. Other Washington County towns, with population, not listed for customers, include:

Cabot (05647)	947
Calais (05648)	451
East Barre (05649)	269
Marshfield (05658)	1,408
Waitsfield (05673)	2,327
Warren (05674)	1,681
Waterbury (05676)	4,630
Waterbury Ctr (05677)	1,941
Websterville (05678)	110
Woodbury (05681)	277

Together, these 10 communities represent 14,041 additional residents of Washington County, which has a total population of 59,068. Dot question respondents were just as well represented from these unnamed communities as from the other named communities in Washington County. Regrouping communities might be done based on a reliable method for reaching those communities, such as through community newspapers, so that an analysis could be done on the effectiveness of advertising by locale.

2. Given that the average customer in Q2 estimated they will spend \$27.73 in downtown businesses when coming to the farmers' market, it might be helpful to know as well how much they spend within the farmers' market to determine total economic impact.