



Customer Perception/Preferences Survey



October 8, 2016 - Boise, Idaho

Report Prepared for Boise Farmers Market by:
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Market Overview

Market Name:

Boise Farmers Market

*Date, Time and Location
of Assessments:*

October 8, 2016

10th and Grove Streets, Boise, ID

Executive Director:

Karen Ellis



Market Mission, Vision and Goals

Boise Farmers Market — farmers you can trust, food you can trace.

Vision

The Boise Farmers Market is a community marketplace where local food and agricultural products are available year round and the community can learn about and become engaged in food system issues. The Market is a catalyst and incubator for local food-related activities in the region, and helps to build personal and community self-reliance.

Mission

The Boise Farmers Market supports a regenerative, healthy food and agricultural system by operating a vibrant marketplace featuring locally grown and crafted products.



www.theboisefarmersmarket.com

Rapid Market Assessment

Rapid Market Assessment (RMA) is an efficient method for researchers and markets to easily capture the opinions and habits of market-goers on a single market day. Information collected on attendance, consumer habits and preferences helps market managers, boards and vendors assess how well they are achieving their mission and goals and may be useful in planning and future decision making.

The key components of an RMA are attendance counts, performed during each hour of market operation, and dot surveys that ask questions previously determined by the market staff and researchers. Volunteers are essential to the process.

For the Boise Farmers Market RMA conducted October 8, 2016, market staff and volunteers focused on the consumer dot survey portion of the RMA exclusively and did not conduct a general attendance count. Customers entering from the East and West sides of the market were surveyed independently using the same set of questions and responded with dot stickers. Approximately 449 customers responded to the survey, 245 entering from the west side entrance and 204 from the east side entrance.

Approximately 449 market-goers responded to the dot survey across all stops.

The six questions asked in the dot survey were:

- What prevents you from purchasing more from the Boise Farmers Market (BFM) for meals throughout the week?
- If you do not shop at BFM regularly, what prevents you from doing so?
- If BFM is not your primary food source during the market season, what is the main reason?
- Which of the following makes you think of buying more at BFM?
- Which of the following statements best describes the Boise Farmers Market?
- If you do not shop at the indoor market in November and December, what prevents you from doing so?

The data collected through an RMA is not without limitations and potential biases. Attendance counts are estimated as accurately as possible. Biases may occur in the dot survey participation, since participation is voluntary. Most people attending market will not participate in the survey process without a direct, personal invitation to do so and generally require guidance on the process. Active, friendly volunteers are key to attracting significant numbers of survey participants.

University of Idaho (UI) Extension was recruited to assist the Market manager in preparing this report for the market.

Boise Farmers Market Customer Survey Results

Participation

Location	East Entrance	West entrance	Total
10 th and Grove Streets	204	245	449

Comments:

The participation counts from each location were remarkably similar. Attendance from the market on the day of the survey may be estimated but was not captured directly.



Dot Survey Results

Total respondents surveyed: ~449

Question 1: Are there barriers for customers when it comes to purchasing more weekly meal ingredients at the Boise Farmers Market?

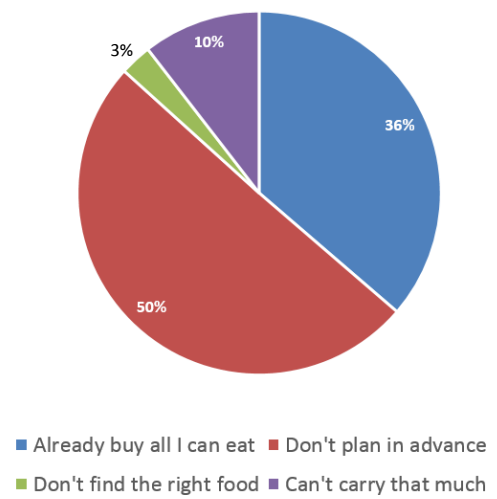
What prevents you from purchasing more for BFM for meals throughout the week?				
WEST SIDE	Already buy all I can eat	Don't plan in advance	Don't find the right food	Can't carry that much
9:00 to 10:00	53	37	3	7
10:00 to 11:00	17	27	0	10
11:00 to 12:00	12	41	2	4
12:00 to 1:00	8	15	1	4
TOTALS	90	120	6	25
Totals from East Side	52	77	5	16
BELOW				
Grand Totals	<u>142</u>	<u>197</u>	<u>11</u>	<u>41</u>

EAST SIDE				
9:00 to 10:00	13	12	0	4
10:00 to 11:00	12	19	0	1
11:00 to 12:00	17	38	4	6
12:00 to 1:00	10	8	1	5

Comments:

Half of the customers who responded to the survey are not buying more of their meal ingredients at the market simply because they do not plan ahead. This may mean that they do not create menus at home, that they do not shop with a list, that they didn't budget for market expenditures or perhaps they did not come prepared to take or store a significant amount of food that day. Just over a third (36%) of shoppers surveyed claim to be buying all they can use. Only 10% find they can't carry more than they are currently buying. And just 3% responded that they are not finding "the right food." This could be due to a number of reasons: dietary restrictions, convenience, or personal preference. Based on these numbers, the market could focus on ways to help customers plan ahead, perhaps with more pre-market communication about what will be in season, providing sample menu plans, shopping list templates or by creating and sharing weekly or seasonal "meal kit" ideas with ingredients from multiple vendors.

Barriers to purchasing more food at BFM



Question 2: What keeps some customers from shopping regularly at the Boise Farmers Market?

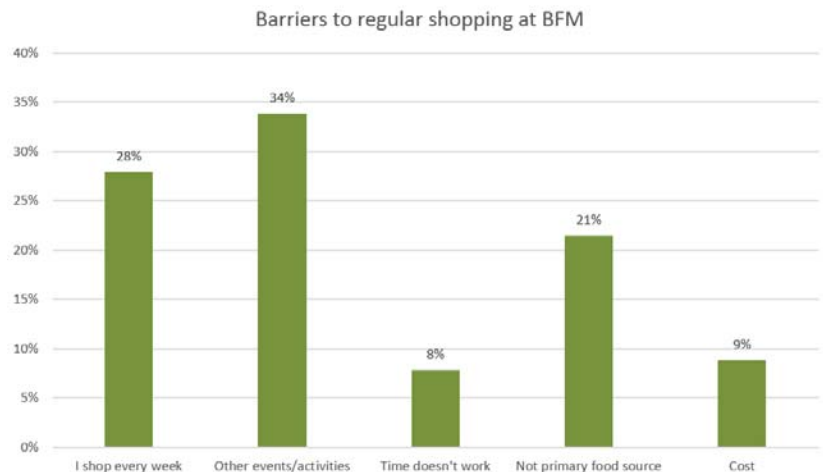
If you do not shop at BFM regularly, what prevents you from doing so?					
WEST SIDE	I shop every week	Other events/activities	Time doesn't work	Not primary food source	Cost
9:00 to 10:00	37	34	8	20	9
10:00 to 11:00	17	22	2	13	2
11:00 to 12:00	15	28	10	16	1
12:00 to 1:00	6	7	6	4	7
TOTALS	75	91	26	53	19
Totals from East Side BELOW	42	51	7	37	18
Grand Totals	117	142	33	90	37

EAST SIDE					
9:00 to 10:00	12	15	0	2	6
10:00 to 11:00	9	9	0	10	2
11:00 to 12:00	17	18	5	18	7
12:00 to 1:00	4	9	2	7	3

Comments:

Busy schedules seem to be the primary barrier to regular shopping among those surveyed. Nearly 30% of customers already shop every week. The remainder either do the majority of their shopping elsewhere or have time and budget constraints. Making sure that customers know about options like the Boise Farmers Mobile Market may make it easier for them to purchase from their favorite

vendors outside of the Saturday time frame. Individual vendors who market their products through other channels (Boise Coop, Idaho’s Bounty, local restaurants, etc., may also want to be sure to promote this with their loyal customers as well.



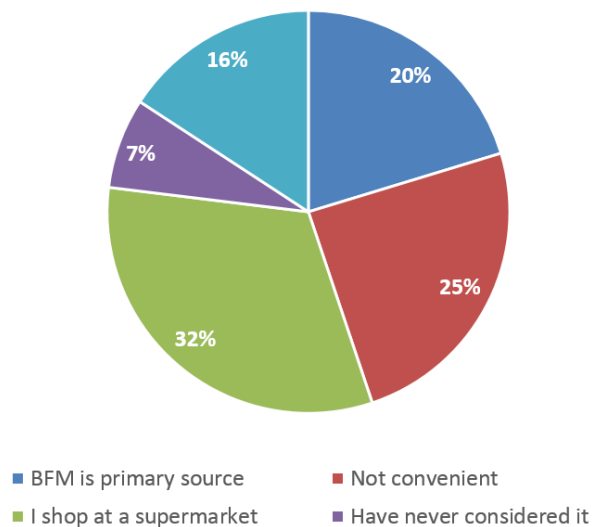
Question 3: Why don't customers don't buy all their weekly food at the Boise Farmers Market?

If BFM is not your primary source of food during the market season, what is the main reason?					
WEST SIDE	BFM is primary source	Not convenient	I shop at a supermarket	Have never considered it	Cost
9:00 to 10:00	31	27	30	11	13
10:00 to 11:00	12	9	24	4	3
11:00 to 12:00	6	23	22	7	12
12:00 to 1:00	4	5	7	0	2
TOTALS	53	64	83	22	30
Totals from East Side BELOW	28	34	45	7	33
Grand Totals	81	98	128	29	63

EAST SIDE					
9:00 to 10:00	9	6	5	2	4
10:00 to 11:00	5	10	9	0	6
11:00 to 12:00	10	12	27	3	18
12:00 to 1:00	4	6	4	2	5

Comments:

Reasons BFM is not your primary source of weekly food purchases?



The most popular answer to this question was “I shop at a supermarket.” What would help clarify this answer more would be knowing *what* customers are purchasing at a supermarket that they either don't or *can't* buy at the Boise Farmers Market. What is encouraging, however, is that 20% of those surveyed already consider BFM a primary source of their fresh food purchases. For the 25% who feel it is not convenient for BFM to be their primary source of fresh food purchases, it would be worth exploring what would make it more convenient to them.

Question 4: What kinds of messaging would motivate BFM customers to purchase more?

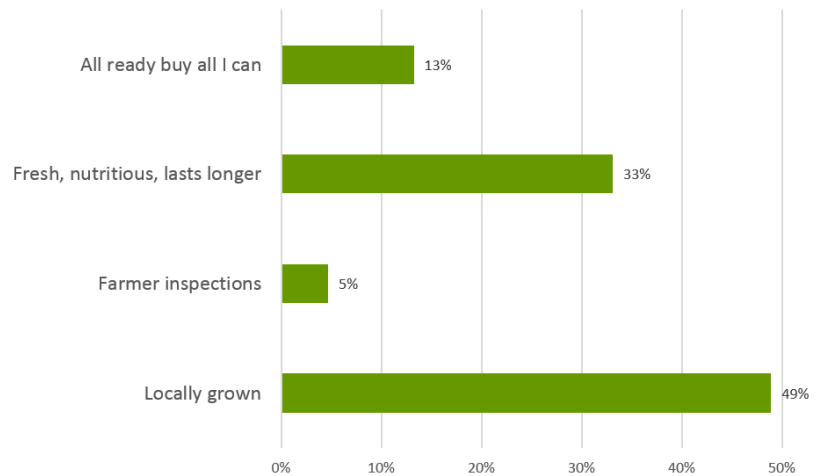
Which of the following makes you think of buying more at BFM?				
WEST SIDE	Locally grown	Farmer inspections	Fresh, nutritious, lasts longer	All ready buy all I can
9:00 to 10:00	43	2	56	18
10:00 to 11:00	33	4	20	5
11:00 to 12:00	52	4	27	2
12:00 to 1:00	10	1	11	5
TOTALS	138	11	114	30
Totals from East Side BELOW	91	11	41	32
<u>Grand Totals</u>	<u>229</u>	<u>22</u>	<u>155</u>	<u>62</u>

EAST SIDE				
9:00 to 10:00	11	4	11	7
10:00 to 11:00	13	1	10	6
11:00 to 12:00	49	3	15	12
12:00 to 1:00	18	3	5	7

Comments:

Messaging is important, and many shoppers are driven by their values when they choose to come to the Boise Farmers Market. More shoppers surveyed respond to “locally grown” over any other messaging aimed to increase market sales. This is followed by a motivation to buy based on the belief that market foods are fresh, nutritious and longer lasting. A moderate percentage, 13%, feel that they are already buying all they can and would not be as responsive to messaging. Only 5% would be moved to purchase more based on assurances provided by farm and or/farmer inspections conducted by the market or a third party. It could also be that “farmer inspections” is not clearly understood by market shoppers. The takeaway from this question is that continuing to “sell” the market as a premier source of locally grown, fresh, nutritious food is a primary motivator for selling more to new customers as well as those already loyal to the market.

Motivation to buy more at Boise Farmers Market



Question 5: What is the image of the Boise Farmers Market presented to shoppers in the community?

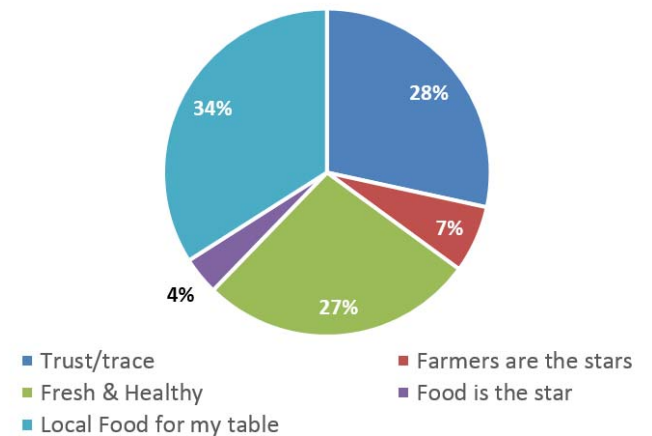
Which of the following best describes Boise Farmers Market?						
	Trust/traceability	Farmers are the stars	Fresh & Healthy	Food is the star	Local Food for my table	
9:00 to 10:00	49	11	56	10		43
10:00 to 11:00	18	1	26	1		17
11:00 to 12:00	31	11	20	4		48
12:00 to 1:00	7	4	18	2		15
TOTALS	105	27	120	17		123
Totals from East Side BELOW	62	12	40	5		77
Grand Totals	167	39	160	22		200

EAST SIDE						
9:00 to 10:00	13	2	8	2		17
10:00 to 11:00	6	1	13	1		11
11:00 to 12:00	24	7	15	2		41
12:00 to 1:00	19	2	4	0		8

Comments:

This question sought to understand how community members view and value the Boise Farmers Market. Which messages best reflect their impressions of the market? As in Question 4, local food is the value most attributed to the Market by shoppers responding to this survey (34%). The trust factor and traceability of the products sold at the Boise Farmers Market were foremost for 28%. This may be in response to the effective market tagline, “farmers you can trust, food you can trace.” The image of Boise Farmers Market as a source of fresh and healthy foods was the primary image for 27% of those surveyed. Customers were less likely to choose “farmers are the star” or “food is the star” as their general impression of the market. Customers are picking up on the core values of the Boise Farmers Market: local food, trust and traceability, and fresh, healthy choices. Continuing to build on this image and reputation will most likely continue to resonate with community members and should always be included when marketing the image of BFM.

What best describes the Boise Farmers Market?



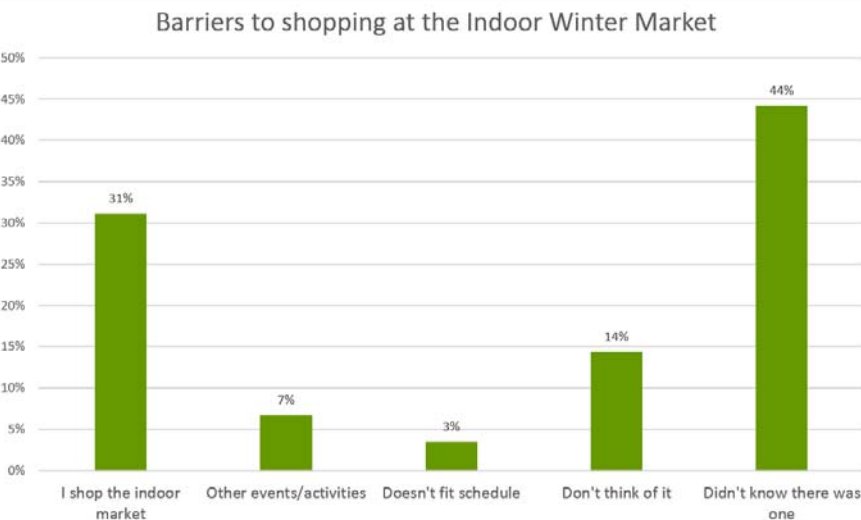
Question 6: Are customers aware of the indoor BFM winter market and are they choosing to shop there?

If you do not shop at the indoor market in November & December, What prevents you from doing so?					
<u>WEST SIDE</u>	I shop the indoor market	Other events/activities	Doesn't fit schedule	Don't think of it	Didn't know there was one
9:00 to 10:00	34	15	2	19	40
10:00 to 11:00	14	2	2	5	29
11:00 to 12:00	19	5	3	13	32
12:00 to 1:00	8	3	2	3	18
TOTALS	75	25	9	40	119
Totals from East Side BELOW	59	4	6	22	71
<u>Grand Totals</u>	<u>134</u>	<u>29</u>	<u>15</u>	<u>62</u>	<u>190</u>

<u>EAST SIDE</u>					
9:00 to 10:00	19	0	0	6	8
10:00 to 11:00	14	0	3	5	9
11:00 to 12:00	19	4	3	9	41
12:00 to 1:00	7	0	0	2	13

Comments:

The most important take-away from this question is that nearly 60% of those surveyed either did not know about the winter market or don't think of shopping there. This indicates a significant marketing and communication opportunity to increase awareness of the indoor winter market and the opportunities it provides. Just under a third of those surveyed are aware of the winter market and choose to shop there. Only 10% were discouraged by



schedules or conflicting activities. Boise Farmers Market may want to consider focusing efforts on marketing the Indoor Winter Market throughout the season through a variety of channels, including at the summer Saturday market and Mobile Market and by encourage individual vendors who move to the winter market to be sure to communicate this to their loyal customers.



University of Idaho Extension



For more information on this report, please contact:

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