

**Orofino Farmers' Market
Rapid Market Assessment
25 September 2012**

Market Name: Orofino Farmers' Market
Date of Assessment: September 25, 2012
Market Hours: Tuesdays, 3:00 pm to 6:00 pm
Location: Orofino City Park, Orofino, ID
Market Managers: Ralph Roseberg/John Allen
Market Board: Ralph Roseberg, President; John Allen, Vice President; Grace Kehlet,
Secretary; Cheryl Maas, Clerk; Margie Willis, Treasurer

Fees: Weekly fees \$5.00 for standard size booth / \$80.00 for season

Vendors: 14 vendors

Estimated Market Sales: **\$ 1452**

RMA Team Members: Bill Warren, UI Extension Educator, Clearwater County
Kathleen Tift, UI Extension Educator, Nez Perce County
Tami Wayt, UI Extension Office Manager, Clearwater County
Michaela Neet, Market Manager, Lewiston Farmers Market
Ralph Roseberg, Board President, Orofino Farmers Market
John Allen, Board Vice President, Orofino Farmers Market
Kathryn Allen, Volunteer, Orofino Farmers Market

RMA Report Authors: Bill Warren
Kathleen Tift

Introduction

Rapid Market Assessment (RMA) is a technique developed by Oregon State University Extension (Lev et al. 2004) to assess the performance of a farmers market. This is the fourth year of the Orofino Farmers Market. Studies have shown that markets that make it through the fourth year have a much higher chance of succeeding long term.

An RMA was conducted on the Orofino Farmers Market in September of 2009 (the first year of the market), as it had been three years since an RMA was done it was felt that another assessment was needed to gauge how well the market was doing and get customer feedback on ways to improve the market. Information from the current assessment will be compared with the results from 2009 and used to provide the Orofino Farmers Market Board with information on which to set future policies for the market, and undertake initiatives that will improve the market.

Methods

The protocol for this assessment was taken from Lev et al. (2008). A “dot survey” is used to obtain input from market attendees. Attendees answer a set of multiple choice questions by using self-adhesive dots. Colors of dots are changed each hour so data can be sorted by time of response. In this RMA, five multiple choice questions were used, and one opened-ended question.

Total estimated expenditures were based on multiplying the number of dot-survey respondents who indicated a particular dollar range spent by the mid-point of the range. For example, five people indicated they spent between zero and \$5.00, so the total amount spent for these respondents was estimated by multiplying $5 \times \$2.50 = \12.50 ; similarly the mid-point of the range \$6-10 was \$8.00 multiplied by the number of people who indicated they spent within this range (12) for a total estimate of \$96.00. The total spent by those taking the survey was calculated by summing the estimated spent in each category. Since an estimated 25% of market attendees took the survey the total amount spent at the market was calculated by multiplying the total estimated spent by those taking the survey (30) by four.

Counts of market attendees were made by the use of four volunteers, each assigned to one section of the market boundary. A market boundary was determined and divided up into four sections. Each volunteer was assigned one section to count for one twenty minute period each hour, from 20 minutes after the hour until 40 minutes after the hour. Only adults were counted (see appendix A for instructions and data forms for counters). The counts for each section were totaled for each hour and multiplied by three to get a total estimate of market attendance for that hour. Each hour's total estimate was then summed, to get the total estimate of market attendance for that day.

Five volunteers from outside the market were asked to complete a Constructive Comments and Observations (CCO) form. These forms (see appendix B) are designed for use by knowledgeable individuals who are not connected with the market (are not vendors, board members, market volunteers, etc.), but who can observe the market and give constructive feedback on how the market can be improved. Typically these are individuals who work for other farmers markets or are business owners and managers familiar with principles of good customer service and economic development.

Finally, vendor survey forms (see appendix C) were given to each vendor on the day of the assessment.

Results

Part 1: Market Attendance

Estimated Total Attendance: 120

	Count	Percentage
3:00 pm to 4:00 pm:	72	60.0%
4:00 pm to 5:00 pm:	39	32.5%
5:00 pm to 6:00 pm:	9	7.5%

Part 2: Dot Survey Responses

Thirty individuals—25% of those estimated to have attended the market—completed the survey.

A. Market Revenue

About how much have/will you spend at the market today?

93.3% spent \$20.00 or less; the average amount spent per person was \$12.10; the total estimated amount spent at the market was \$1452

<u>Dollar Amounts</u>	<u>Shopper Percentage</u>
\$0-5	16.6%
\$6-10	40.0%
\$11-15	6.6%
\$16-20	30.0%
\$21-30	3.3%
\$31-40	0.0%
\$41+	3.3%

Comments: Past RMA reports (Orofino 2009; Lewiston 2011) estimated spending based on a shopping group (adults who spend from one “wallet”) of two; however, these reports do not describe how this estimate of shopping group size was arrived at. Based on RMA team familiarity with the market, casual observation on the day of the assessment, and the unavailability of any method for estimating shopping group size, we assumed a shopping group size of “one” for purposes of calculating market expenditures for this assessment.

B. Market Impact on Other Orofino Businesses

Has attending the farmer's market prompted you to visit (or plan to visit) other Orofino businesses today?

Yes—44.8%
No—55.2%

An estimated 54 people, of the 120 estimated to have attended the market, visited or planned to visit other Orofino businesses as a result of their attendance at the market.

C. Perception of food price competitiveness

How do you feel about the produce/food prices at the market?

Very High—3.3%
A Bit High—30%
About Right—63.3%
A Little Lower Than Expected—0%
VERY Competitive—3.3%

D. Preferences for goods sold at the market

What would you like to see more of at the market?

Most respondents wanted to see more fresh produce and more entertainment/events at the market.

Fresh Produce	31.3%
Meat, Dairy, Eggs	12.5%
Baked Goods	9.4%
Other Prepared Foods	9.4%
Crafts	12.5%
Music/Entertainment/Special Events	25.0%

E. Location of Market Attendees

Where do you live?

Over 80% of market attendees were "local"

Orofino—50%

Clearwater County (outside Orofino)—30%

Outside Clearwater County—20% (at least 33% of these were from Peck)

F. Open Ended Question

What changes to the Orofino Farmer's Market would cause you to shop here more or spend more money when you shop?

Organic Foods (2)

Pink Beans

More competitive/Lower Prices (3)

Longer hours (2) (noon-6PM)

Different hours

Exciting new products

Greater variety of products

Idaho Specialty Foods

I love the market, keep it going (2)

More vendors (3)

More entertainment (3)

Legalize skateboarding in the park

Beverages, coffee, etc.

Want to see the market grow

Summary: Greater variety of products, more vendors, lower prices, and more entertainment were the major themes.

Part 3: Constructive Comments and Observations

Atmosphere

Feel of the market, type of shoppers, conversations, educational activities, color, etc.

Most important message to Market Manager from this sheet:

Tents and organization

The music is very nice touch that people seem to really enjoy

Park is perfect but doesn't get attention of people driving by

Market Atmosphere

What are your observations about the Market Atmosphere?

- Feel of the Market

Nice and quiet but too spread out; needs to look more organized and together

Very warm and welcome

The music is a nice touch

Comfortable – relaxed

Park is a very pleasant place to hold the market; it has good shade trees, a kept lawn and easy access. The “feel” is light and friendly

- Type of Shoppers

Very few shoppers (but I was here early)

All ages

Both men and women, a few children

Many folks I know from the community

- Conversations

Competitive about jams and jellies. Proud of their product

Very educated about their product and fun

Primarily about products, but also renewing friendships and catching up

Products for sale, gardening, types of nuts

Pleasantries exchanged, news about other folks, work related conversations

- Educational Activities

Love the live violin music

I did not see any (3)

Liked seeing kids involved with the lemonade stand—would like to see youth engaged in some options to sell products such as crafts, photograph, other

- Other

Marketing to the community this year has been really down. In previous years they used more avenues to let people know about the market in general and the specific products that were available.

Suggested Changes or Improvements:

Line up vendors with tents to draw more attention. Right now it looks like many small family gatherings. Not welcoming.

Summary: Major themes were the pleasant atmosphere of the market, the positive contribution of the music to this atmosphere, and a suggestion to better organize the vendor layout.

Vendors and Products

Product mix, product quality, signage, display, customer service, etc.

Most important message to Market Manager from this sheet:

No more picnic table usage

Vendors would probably do better if they had signage that could be seen before coming up to the booth

I enjoy seeing the signs up around town reminding market day with date and time; staying open till 6pm is very helpful for working families

More vendor signage

What are your observations about Market Vendors and Products?

- Product Mix

Wonderful

Very nice selection

More crafts

Great variety

Better mix this season than in the past; thrilled to see Wilson Banner Ranch attend—Keri is top notch and products are of good quality and quantity; I'm glad there are not too many vendors with same products; I have not purchased from all vendors, I have specific items I'm after and am a reliable repeat customer to those vendors.

- Product Quality

Very good

Everything looked fresh and a nice variety but each station seemed to have the same thing

Good

Appears fresh and just out of garden; love the homemade bread

Good or I wouldn't be back

- Vendor Signage

Some have no signs, so needs improvement

Hit and miss today

There could be better signage about the products they have for sale

Would be great if there was more signage on Highway 12

This could use improvement if they are trying to develop name recognition; I honestly haven't seen much for signage

- Vendor Display

Ok. I don't think using picnic tables especially without table cloths, looks very nice

Variety—some are displayed very nice, others need improvement

Looks good

Good, colorful

Nicely arranged

- Vendor Customer Service

Most all were very helpful in answering questions

Seems to be good

Friendly and informative; music adds a nice touch

Very good

Suggested Changes or Improvements:

Tents, tables, chairs, signs required

Be more open to other groups; It will help bring more people out and build goodwill

Summary: Major themes were the good product quality and variety, but the need for better vendor signage.

Physical Site

Access, parking, flow of people, liability issues, market layout

Most important message to Market Manager from this sheet:

Vendors should park in a line on north side of park and leave lot available for customers

It might feel more friendly if the booths weren't so far apart; they feel isolated

Maybe some chairs set up for people to sit and relax

All the same

What are your observations about the Physical Site?

- Access

Good

Works very well

For those with disabilities the rough ground is a bit of a challenge; otherwise it is ok

Good

Great

- Parking

Ok; perhaps ask vendors to park on north side of park in a line

Adequate while I was there

Very crowded, but I think that is positive because it means people are coming

Good

Getting limited with success of market

- Flow of People

Good

Did not seem to be working since there were very few people

They seem to be moving through well

Appears to have plenty of space

Seems steady

- Liability Issues

Tree branches need to be trimmed

I didn't see anything of concern

None noticed

Hadn't even thought of that

- Market Layout (arrangement of vendor booths in available space)

Needs much improvement; needs uniform organization

For most part, good; one booth seemed to be a little far away for flow of people

They seemed kind of far apart

Booths placed in circle gives room for people to roam and mix; nice to have the playground for the younger children

A bit spread out, but it is great area, so walking across the lawn is a pleasant part of the experience

Summary: Major themes included the good market access but also noting the limited parking with a suggestion for vendors to park along the north side of the park to leave the larger parking area for customers. There was also additional concern expressed about the vendor layout, and the need to organize vendors closer together, and more uniformly.

Part IV. Vendor Survey

Location and Physical Layout

1. How does the location and physical layout of the market work for you (parking, loading and unloading, shade, market layout, visibility, etc.)?

Good location; easy for customers to get in to shop. The sort of unstructured feel is great; allows customers to mingle and visit

Works fine for me

Layout is very disarrayed

Very nice

OK

Very adequate

I think the park works well

It is a beautiful setting; easy to set up with adequate parking; there was a bit too much sun but you can't do anything about the weather

I think it's wonderful! A summer afternoon in the park, under the shade of old trees, visiting and selling; thank you for keeping the market going!

Excellent location—love it

Seems good, can't think of any improvements

Good

Very good

Vendor Fees

1. Were the market fees

Too low: 0%

Adequate: 100%

Too high: 0%

2. Suggestions for market fee structure

By the number of tables

I appreciate getting a small discount when we pay in advance for the whole season

I'm fine with the fee structure and the opportunity to come to market when you have something to sell and not be obligated to sign up for the entire season

If there is an increase, it should be for advertising

I think they should remain where they are as long as they cover our expenses

Market Policies

1. Would you like to see any changes to market policies?

Yes: 7.7%

No: 92.3%

2. If yes, what changes would you like to see?
(some people answered even though they voted “no”)

I like the informality and easy pace of this market

We are still growing; maybe in the future, but not now

Prohibit smoking

By not restricting you have more variety

We need to stay as is or I feel we will lose the fun!

Market Success

1. Please give an estimation of your average weekly farmer market sales (all answers will be kept confidential and will only be used as a market total—for example, “The Orofino Farmers Market generates approximately \$2,000/week in total sales.”)

\$50.00

\$150.00

\$30.00

\$30.00

\$20.00

\$20.00

First time at market so don't know

\$30.00

\$50.00

\$65.00

\$180.00

\$50.00

\$70.00

Comment: One of the top market vendors did not complete the survey and their estimated average sales are not included in this list. It is worth noting that there were only 14 vendors on the day of the assessment as this was late in the season. According to the market manager vendor counts as high as 20 have been noted during the 2012 market.

“Outside Vendors”

1. How would you feel about bringing in out-of-area vendors if they are offering produce or other products not offered locally?

Prefer no outside vendors

As long as we do not have “yard sale” stuff; they either need to grow it or make it

I think vendors should live within 100-150 miles

Not sure

Locally is better produce but crafts could be Northwest made

No

Only if not competing with products sold by local vendors

I think it would be a good idea; it gives a wider variety of products

No problem if they aren't competing with locals; it gives us more to offer

I'm ok with it; more products will attract more customers and potential for my product

No problem; we have out-of-area vendors now and I don't see a problem at this point; the issue will be where large-scale producers from elsewhere come in and under-cut the local growers

Only as a last resort, as in if we get down to very few produce vendors

OK

Partnering with Community Groups

1. How would you feel about partnering with other community groups to schedule events at the market on market day to attract more community interest and customers? (e.g. partnering with local medical clinic or hospital for a “wellness” event to provide free blood pressure screening, healthy diet information, etc.)

Very good idea!

Good idea; not sure how it would go over

Sounds good

Good idea

This would be nice

OK

Might be worth a try

Yes! More the merrier.

I don't feel comfortable with this; people here are selling all kinds of sugar stuff they don't need; the food police, the pictures of mouth cancer were sort of a downer

I think it's worth trying; more services=more people; it's always good to keep things new and changing

I believe this is a good idea; provides a service to the community while attracting attention to the market at the same time

Good idea I think; it would attract more people to market

Good idea

Comments and Suggestions for Improving the Market

1. Please provide your suggestions for how the Orofino Farmers Market could be improved—how to attract more customers and increase sales.

Bigger signs; better advertisement

Some customers would like us to start earlier, like maybe 1pm

Maybe have market twice a week with enough days between the markets to accommodate picking produce from the garden

More advertising

More advertising; as awareness spreads the customers and sales will increase

Possibly have more food vendors such as the "Doghouse" and stay open until 7:00pm so people could have dinner as well

Activities for children; word of mouth; story tellers; puppet shows, etc.; music

In the past we've had more write-ups in the paper that generated quite a few visits; might be nice to get in the paper again next year

I'd like to see more local vendors recruited; perhaps spread the word of our market to the Moscow market's vendors

Could we get more benches? How about someone selling water or soda?

Summary of vendor comments: Vendors liked the location of the market but one shared the concern of some of the reviewers that the vendor layout was unorganized. All vendors preferred the current vendor fee structure, and over 90% did not want to see any changes in market policies. Views of vendors on allowing outside vendors to come in were mixed, some thinking it would be ok and even a good idea, others were opposed. Almost all vendors thought it would be a good idea to partner with other community groups to have special events at the market that could attract more customers. The dominant theme among vendors for improving the market was to have more advertising and publicity to attract more customers.

Discussion

The RMA in 2009 (the first year of the market) was conducted on September 8, approximately 2 ½ weeks earlier than this assessment, and before the Clearwater County fair. It is important to keep in mind that this difference in timing may explain some of the differences in data collected in 2012 from 2009.

In 2009 the estimated market attendance was 222, or 102 more than was estimated in this assessment. The distribution of attendance also differed in 2009, with the proportion of attendance between the hours of 3:00 and 4:00 equal to the proportion of attendance between 4:00 and 5:00, with both time periods accounting for 43% of the attendance each. In this assessment 60% of the attendance was in the first hour (3:00-4:00) with only a little more than half that many attending during the second hour (4:00-5:00). Both assessments showed the least attendance during the third and final hour of the market (5:00-6:00), with 14% of attendance during this time in 2009, and 7.5% in 2012.

The reason for the decline in estimated market attendance between 2009 and 2012 could be due to a number of factors. For one, there were fewer vendors participating in the market during this assessment than in 2009. In 2009, 26 vendors were participating on the day of the assessment (although it is not completely clear from the 2009 RMA report, and supporting information, whether the 26 referred to the number of vendors on assessment day, or were the number participating at some time during the 2009 market year), but only 14 (a little more than half as many) in 2012. As already mentioned, the timing of this assessment later in the year, and after the county fair, could have influenced attendance. Of course other factors could be a decline in community interest in, or awareness of, the market, as well as the prolonged recovery from the recession since 2009.

Estimated sales in 2009 (\$1807) were about 24% higher than in 2012 (\$1452). Although, this decline mirrors the direction of the decline in estimated market attendance, it is not of the same magnitude (market attendance was only a little more than half of that measured in 2009). One problem in assessing this difference in sales, is the undocumented protocol used in 2009 for estimating the size of a “shopping group.” Given the 2009 estimate of “two” constituting the shopping group size, resulted in a division of estimated market attendance by half, before estimating total sales. As this was not done in this assessment, 2012 expenditures could be overestimated, while expenditures in 2009 underestimated, making the real magnitude of the difference in sales between the two years much greater than indicated by the data.

A secondary source of data for total sales in 2012 were the responses for average weekly sales obtained in the vendor survey, allowing for one non-response, and that one of the largest vendors did not complete the survey, the vendor survey data gives an estimate of market sales of around \$900 as the weekly *average* for the vendors present on assessment day, not what was actually sold on market day.

There are several possible reasons for estimated market sales being different from actual sales, not the least of which is that individuals taking the survey self-select (they are not randomly or

systematically drawn from the total individuals attending), so their spending may not be reflective of those who elect not to take the survey.

Comparing the results of the Constructive Comments and Observations forms from 2009 with 2012 showed similarities in comments regarding the overall atmosphere of the market (good), and the importance of music (which the market didn't have on the day of the assessment in 2009). "Vendors and Products" comments were also similar in that reviewers liked the quality and variety of products as well as the friendliness and helpfulness of vendors, but as with this assessment, reviewers in 2009 found a problem with the lack of appropriate vendor signage to be an important issue. Comments on the "Physical Site" part of the survey were generally positive in the 2009 assessment, the issues noted in this assessment related to parking and problems with the market layout were not noted in 2009.

Similarities between the vendor surveys conducted in 2009 and 2012 included satisfaction with the location and a preference for the current schedule of vendor fees (\$5.00 in both 2009 and 2012). Both assessments also found satisfaction with market policies. While vendors expressed a strong desire for more market advertising and promotion in the 2012, this issue was only mentioned once in 2009.

Some of the concerns and suggestions for improving the market identified in this assessment have also been identified in published research, and other reports, that looked at factors that make farmers' markets successful. These include the need for a better organized and compact vendor layout; the importance of having a large selection of fresh produce and entertainment/events; the need for advertising, publicity, and active vendor recruitment; as well as the importance of good vendor signage (for example, see: Lakins 2007; Northeast Organic Farming Association of Vermont 2009; Stephenson et al. 2008; Menasco 2012; Good Food Strategies LLC 2009; Idaho State Department of Agriculture 2012; Farmers' Market Federation of New York 2005).

Conclusions

The good news from this assessment is that the Orofino Farmers Market is continuing to attract over 100 people on market day and generate over \$1,000 in total market sales, and as of this writing it has successfully completed four years of continuous market operation. In addition, market attendees, market reviewers, and vendors seem to be generally happy with the market, particularly the market location, atmosphere, the quality of the produce, and market policies and fees.

The market also demonstrated a significant impact on other local business, with almost 45% of market attendees taking the survey reporting that coming to the market prompted them to visit other local businesses.

Issues that were pointed out for improvement include the need for more advertising and publicity, recruiting more vendors and products for sale, the desire for more fresh produce and entertainment at the market, support for partnering with other community entities to schedule

events that will attract more visitors to the market, problems with market layout, and improvements in vendor signage.

One concern is the dramatic decrease in the number of vendors and market attendees in 2012 vs. 2009. According to some of the studies of farmers markets cited above, smaller markets are at much higher risk of failure than large markets. Having a variety and quantity of products and vendors available is needed to attract the customers to keep the market viable, and the more customers, the greater incentive for vendors to participate in the market.

The authors would suggest strategies be undertaken to increase the exposure of the market with potential customers and a concerted effort to attract new vendors. Addressing some of the other recommendations for improvement that came out of this assessment could be accomplished by amending market policies.

Literature Cited

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Appendix A

RMA Counting Customers Tally Sheet

Instructions for Counters

(Need a watch or cell phone to keep time)

- Count your assigned section only
- Count Adults only
- Make sure that individuals you count actually go into the market and do not walk through, but individuals don't have to purchase something to be counted.
- Only count individuals **entering** the market, **not** individuals already in the market, or leaving the market
- Officially Count three times; for 20 minutes each hour at 3:20–3:40pm, 4:20-4:40pm and 5:20-5:40. Record total after each count in table below.
- Accuracy is important—we don't want to over or under count the market

Name:	Location:				
	1st count 3:20 to 3:40 pm	2nd count 4:20 to 4:40 pm	3rd count 5:20 to 5:40 pm	4th count XXXXX	TOTAL
Customer Numbers					

Comments or notes for RMA team:

Appendix B

Constructive Comments and Observations Form Orofino Farmers Market – September 25, 2012

Name _____

Atmosphere

Feel of the market, type of shoppers, conversations, educational activities, color, etc.

Most important message to Market Manager from this sheet:

What are your observations about the Market Atmosphere?

- Feel of the Market

- Type of Shoppers

- Conversations

- Educational Activities

- Other

Suggested Changes or Improvements:

**Constructive Comments and Observations Form
Orofino Farmers Market – September 25, 2012**

Name _____

Vendors and Products

Product mix, product quality, signage, display, customer service, etc.

Most important message to Market Manager from this sheet:

What are your observations about Market Vendors and Products?

- Product Mix

- Product Quality

- Vendor Signage

- Vendor Display

- Vendor Customer Service

- Other

Suggested Changes or Improvements:

**Constructive Comments and Observations Form
Orofino Farmers Market – September 25, 2012**

Name _____

Physical Site

Access, parking, flow of people, liability issues, market layout

Most important message to Market Manager from this sheet:
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What are your observations about the Physical Site?

- Access

- Parking

- Flow of People

- Liability Issues

- Market Layout (arrangement of vendor booths in available space)

- Other

Suggested Changes or Improvements:

Appendix C

2012 Orofino Famers Market Vendors Survey

Please complete the survey below, all answers will be kept confidential and sales numbers will not be used individually but only as a collective market.

Location and Physical Layout

2. How does the location and physical layout of the market work for you (parking, loading and unloading, shade, market layout, visibility, etc.)?

Vendor Fees

3. Were the market fees
 - a. Too low
 - b. adequate
 - c. too high
4. Suggestions for market fee structure

Market Policies

3. Would you like to see any changes to market policies? Yes No
4. If yes, what changes would you like to see?

Market Success

2. Please give an estimation of your average weekly farmer market sales (all answers will be kept confidential and will only be used as a market total—for example, “The Orofino Farmers Market generates approximately \$2,000/week in total sales.”)

“Outside Vendors”

2. How would you feel about bringing in out-of-area vendors if they are offering produce or other products not offered locally?

Partnering with Community Groups

2. How would you feel about partnering with other community groups to schedule events at the market on market day to attract more community interest and customers? (e.g. partnering with local medical clinic or hospital for a “wellness” event to provide free blood pressure screening, healthy diet information, etc.)

Comments and Suggestions for Improving the Market

2. Please provide your suggestions for how the Orofino Farmers Market could be improved—how to attract more customers and increase sales.