

MOSCOW FARMERS MARKET

RAPID MARKET ASSESSMENT

JULY 28, 2018

Market Name: **Moscow Farmers Market**
Date of Assessment: July 28, 2018
Market Hours: Saturdays, 8:00 am to 1:00 pm
Location: Main Street, between 3rd and 6th, including Friendship Square and 5th Street between alley and Main Street
Market Manger: Amanda Argona
Market Staff: Paid, full-time, Community Events Coordinator (FM Manager); full-time AmeriCorps Volunteer; part-time sound technician
Fees: Tiered fee structure based on number of market days attending. Base booth fees range from \$15-\$30 per market. Annual registration fee is mandatory. Other daily fees may apply.
Vendors: 100 vendors on that day:
36% Produce
17% Specialty Food
31% Crafts
Estimated Market Sales: \$117,829 to \$147,323
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Introduction: On Saturday, July 28, 2018, a team of community members, led by University of Idaho Extension, performed a Rapid Market Assessment (RMA) of the Moscow Farmers Market. The assessment had three components: 1) adult customer count, 2) four-question dot survey, and 3) constructive comments and observations by the RMA Team (Lev, Brewer and Stephensen 2008). This report provides a summary of the 2018 RMA findings.

Prior to this RMA, the last RMA of the Moscow Farmers Market was conducted July 30, 2011 when the Market was located in the Jackson Street parking lot (Williams 2011). Approximately 950 adult customers participated in the 2011 RMA.

Where applicable, this report provides a comparison of the 2011 RMA results and the 2018 RMA results. This comparison provides an opportunity to see similarities and differences in the Market since moving from the Jackson Street parking lot to Main Street.

PART 1: ADULT CUSTOMER COUNT

Market customer counts are estimates. They are derived by counting the number of adult shoppers in the Market at opening plus hourly customer estimates (Table 1). To obtain hourly estimates, volunteers are stationed at each market entrance (Table 2) for 10 minutes (25-35 minutes after each hour the market is open). Using clickers, volunteers count the number of adults entering the Market in that ten-minute period. The ten-minute counts are then multiplied by six (10 minutes x 6 = 60 minutes) to obtain an estimate of adult customers entering the Market during that hour. Children are not counted.

Table 1: Estimated Total Customers (Adults only): 10,082

<i>Time</i>	<i>Count</i>	<i>Percentage</i>
<i>8:00 am – at opening</i>	314	3%
<i>8:00 am to 9:00 am</i>	1626	16%
<i>9:00 am to 10:00 am</i>	2004	20%
<i>10:00 am to 11:00 am</i>	2646	26%
<i>11:00 am to 12:00 pm</i>	2094	21%
<i>12:00 pm to 1:00 pm</i>	1398	14%

2018 RMA Comments: As shown in Table 1, the peak time period for Market customers appears to be between 9 am to 12 pm. The peak hour for customers appears to be from 10 am to 11 am.

Table 2: Number of Customers Using Market Entrance

Entrance	Percent of Shoppers
3rd Street	27%
4th Street (playground)	25%
4th Street (fountain)	5%
5th Street (Co-op)	17%
6th Street	26%

The percentage of shoppers entering the market from 3rd Street, 4th Street parking lot (near play structure) and 6th Street differed by less than 2% (Table 2) and accounted for approximately 78% of shoppers. The 5th Street entrance by the Co-op accounted for 17% of shoppers. The remaining shoppers (5%) came in through the least used entrance, 4th Street, east of the fountain.

Table 3: Customer Count Comparison Between 2011 RMA and 2018 RMA

RMA Date	Total Estimated Adult Customers
July 30, 2011	5329
July 28, 2018	10,082

2011 to 2018 Comparison: The estimated number of adult customers at the Market, on the last Saturday in July, increased by approximately 53% (an additional 4753 adults) between 2011 and 2018 (Table 3). The peak customer times were the same, 9 am to 12 pm with the highest estimated number of customers between 10 am to 11 am.

PART 2: DOT SURVEY

Adults in the market, one per household, were asked to complete a four-question dot survey indicating why they came to the market, where they lived, how much they anticipated spending in the market and how much they anticipated spending outside the market in the downtown area.

The dot survey questions were the same as those asked in the 2011 RMA. A discussion of differences follows the presentation of 2018 data providing insight into changes in customer motivations, origin and spending.

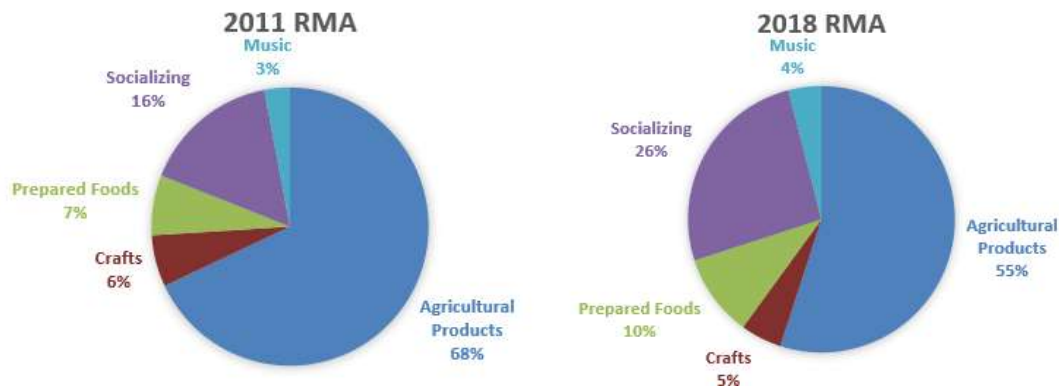
2018 Dot Survey Participation: Approximately 10.6% (1070) of adults who visited the Market participated in the dot survey. Respondent numbers by question varied slightly (less than 5%). This variation is to be expected as some customers are unwilling to answer, primarily, spending questions.

Table 4: Question #1 - What is your primary reason for coming to the market today?

<i>Primary Reason</i>	<i>Percent of Respondents (n=1070)</i>
<i>Agricultural Products</i>	55%
<i>Crafts</i>	5%
<i>Prepared Foods</i>	10%
<i>Socializing</i>	26%
<i>Music</i>	4%

2018 RMA Comments: The majority of survey respondents (55%) indicated the primary reason they came to market was for agricultural products (Table 4). In the first half of the market (8-10 am), 63% said they came for agricultural products and, in the second half of the market (10 am – 1 pm), 49% came for agricultural products, a 14% decrease. Overall, 26% of respondents indicated coming to the market to socialize. There was a 13% increase in the number of customers coming to socialize between the first half of the market (18%) and second half of the market (31%).

Figure 1: Primary Reason Comparison Between 2011 RMA and 2018 RMA



2011 to 2018 Comparison: In both 2011 and 2018, customers indicated agricultural products and socializing were the two primary reasons for coming to Market (Figure 1). In 2011, overall 68% of shoppers indicated the primary reason they came to the market was for agricultural products and only 16% for socializing. Comparing responses from 2011 and 2018, there was 13% decrease in the number of people primarily coming for agricultural products and a 10% increase in the number of respondents coming to the market to socialize. There was also a slight increase, 3%, in the number of people coming primarily for prepared foods.

Table 5: Question #2 - Where do you live?

<i>Location</i>	<i>Percent of Respondents (n=1043)</i>
<i>Moscow</i>	46%
<i>Other Latah County</i>	6%
<i>Pullman & Whitman County</i>	21.5%
<i>LC Valley, Asotin & Nez Perce County</i>	5%
<i>Other N. Idaho & E. Washington</i>	4%
<i>Out of Area, Visitor, Tourist</i>	17.5%

2018 RMA Comments: As shown in Table 5, about 46% of the customers responding to the survey reside in Moscow and a total of 52% of respondents were from Latah County. Of the 48% of respondents residing outside of Latah County, a little over 21% were from Whitman County and over 17% were from outside of north Idaho and eastern Washington (response category “out of the area, visitor, tourist”). In the first half of the Market, 52% of respondents resided in Moscow and in the second half only 48% resided in Moscow. Customers from outside of Latah County increased by approximately 11% between the first and second half of the Market.

2011 to 2018 Comparison: There is very little difference in where customers indicated they live between the 2011 and 2018 RMAs. The greatest difference is in the percent of shoppers from out of the area, a 5% increase from 2011 to 2018. In all other categories, the difference between 2011 and 2018 is 3% or less.

Table 6: Question #3 - How much have you (or will you) spend at the market today?

<i>Dollar Amount Spent Inside Market</i>	<i>Percent of Respondents (n=1034)</i>
<i>\$0</i>	6%
<i>\$5</i>	9%
<i>\$10</i>	14%
<i>\$15</i>	11%
<i>\$20</i>	20%
<i>\$30</i>	15%
<i>\$40</i>	11%
<i>\$50+</i>	14%

2018 RMA Comments: Spending is estimated by “shopping group” – adults who spend from one “wallet.” A shopping group is generally one or two adults. Adults from the same household were asked to answer the survey using one dot per question to avoid

over counting. About 54% of survey respondents indicated they would spend between \$5.00-\$20.00 in the market and 40% indicated they would spend over \$20.00 (Table 6).

Of the sales reported by survey respondents (\$24,178), approximately 32% were baskets ranging in value from \$0-\$20.00 and 68% in baskets \$20.00-\$50.00 in value. (A “basket” refers to the total market purchases made by a shopping group.)

Table 7: Average Amount Spent by Shopping Group

<i>Time Period</i>	<i>Average \$ Spent</i>
<i>All of Market (8:00 am to 1:00 pm)</i>	\$23.38
<i>First half of Market (8:00 am to 10:00 am)</i>	\$24.83
<i>Second half of Market (10:00 am to 1:00 pm)</i>	\$22.38

2018 RMA Comments: The average amount spent per shopping group is calculated by dividing the total amount survey respondents indicate they spent (\$24,178) by the total number of shopping groups who completed the survey question (1034). Overall, the average amount spent per shopping group was \$23.38. There was very little variation in spending per shopping group, average of \$1.50, between the first and second half of market (Table 7).

Estimated Total Market Sales

Using the Rapid Market Assessment methodology, **total market sales** can be estimated as follows:

- Number of shoppers divided by the number of adults per shopping group equals the number of shopping groups.
- Number of shopping groups multiplied by the average amount spent per shopping group equals the estimated total market sales.

The number of adults per shopping group is estimated to range from 1.6 to 2.0. Using 2.0 reflects a more conservative estimate on spending.

Table 8: Estimated Total Market Sales on July 28, 2018

<i>Total Number Shoppers</i>	<i>Shopping Group Size</i>	<i>Number of Shopping Groups</i>	<i>Estimated Market Sales (\$23.38 basket)</i>
10,082	2.0	5041	\$117,859
10,082	1.6	6301	\$147,323

2018 RMA Comments: Shown in Table 8, the estimated total market sales ranges from \$117,829 to \$147,323. Since an estimated 48% of the survey respondents indicated they lived outside Latah County (Table 5), we can estimate that 48% of Market sales (between \$56,577 and \$70,715) were to customers residing outside of Latah County.

Table 9: Estimated Total Market Sales Comparison 2011 & 2018

<i>Estimate</i>	<i>2018 RMA</i>	<i>2011 RMA</i>	<i>Difference</i>
<i>Low Estimate (2.0 adults per shopping group)</i>	\$117,859	\$53,067	\$64,792
<i>High Estimate (1.6 adults per shopping group)</i>	\$147,323	\$66,354	\$80,969

2011 to 2018 Comparison: The average 2011 basket (amount spent per shopping group) across all market hours (8 am to 1 pm) was estimated as \$19.92. The average 2018 basket size was \$23.38 and increase of 17% (\$3.46) per basket.

In 2011, the total market sales were estimated to be a low of \$53,067 (2.0 adults per shopping group) and a high of \$66,354 (1.6 adults per shopping group). Estimated Market sales in 2018, ranging from \$117,859 to \$147,323, show a 122% increase in total market sales over 2011 (Table 9).

Table 10: Question #4 - Do you plan on doing any additional shopping or eating in the downtown area this morning? If yes, how much do you anticipate spending?

<i>Dollar Amount Spent Outside Market</i>	<i>Percent of Respondents (n=1018)</i>
<i>\$0</i>	33%
<i>\$5</i>	14%
<i>\$10</i>	13%
<i>\$15</i>	9%
<i>\$20</i>	12%
<i>\$30</i>	8%
<i>\$40</i>	4%
<i>\$50+</i>	6%

2018 RMA Comments: In order to better understand the economic impact of the Market on downtown businesses, survey respondents were asked whether they planned on doing additional shopping or eating in the downtown area (outside of the market) and, if yes, how much they anticipated spending. Sixty-seven percent (67%) of respondents indicated they would be shopping at other downtown establishments that day (Table 10).

About 48% of shoppers indicated they would spend between \$5-\$20.00 outside of the Market and 19% indicated they would spend between more than \$20.00 outside of the Market. The average downtown expenditures anticipated by survey respondents was \$13.05 per shopping group.

Table 11: Estimated Total Downtown Expenditures by Market Shoppers on July 28, 2018

<i>Total Number Shoppers</i>	<i>Shopping Group Size</i>	<i>Number of Shopping Groups</i>	<i>Estimated Expenditures (\$13.05 per shopping group)</i>
<i>10,082</i>	2.0	5041	\$65,785
<i>10,082</i>	1.6	6301	\$82,228

Total outside market spending in the downtown area: Outside market spending is calculated by taking the average dollar amount that shopping groups anticipated spending downtown (\$13.05) and multiplying it by the total number of shopping groups.

Total downtown expenditures by Market customers ranged from \$65,785 to \$82,228 (Table 11). Estimated downtown expenditures by customers living outside Latah County ranged from \$31,577 to \$39,471.

Table 12: Estimated Downtown Expenditures Comparison 2011 & 2018

<i>Estimate</i>	<i>2018 RMA</i>	<i>2011 RMA</i>	<i>Difference</i>
<i>Low Estimate (2.0 adults per shopping group)</i>	\$65,785	\$34,925	\$30,860
<i>High Estimate (1.6 adults per shopping group)</i>	\$82,228	\$43,669	\$38,559

2011 to 2018 Comparison: In 2011, that average dollar amount survey respondents indicated they would spend shopping at downtown establishments was \$13.11. The average amount 2018 respondents anticipated spending was \$13.05, a less than 1% change per shopping group.

The estimated total outside market spending in 2011 ranged from a low of \$34,925 (2.0 adults per shopping group) to a high of \$43,669 (1.6 adults per shopping group). Estimated 2018 downtown expenditures, ranging from \$65,785 to \$82,228, show a 88% increase in total downtown expenditures by Market shoppers over the same Saturday in 2011 (Table 12).

Estimated total downtown expenditures by Market customers living outside of Latah County rose from \$15,018-\$18,778 in 2011 to \$31,577-\$39,469 in 2018. Approximately a 110% increase.

References:

Lev, Larry, Linda Brewer and Garry Stephenson. Tools for Rapid Market Assessments. Special Report 1088-%, Oregon Small Farms technical Report No. 6. Oregon State University, May 2008. Retrieved from http://smallfarms.oregonstate.edu/sites/default/files/small-farms-tech-report/eesc_1088-e.pdf.

Williams, Cinda. *Moscow Farmers' Market Rapid Market Assessment July 30, 2011*.
University of Idaho Extension research report. Available from
cdephelps@uidaho.edu.

PART 3: CONSTRUCTIVE COMMENTS AND OBSERVATIONS SUMMARY

Note: The purpose of this section of the report is to provide the Market with feedback about individual aspects of the market observed by the RMA Team. The comments summarized below were received by people very familiar with the Moscow Farmers Market: five community members and three farmers market commission members. These remarks are intended to be comprehensive nor do they provide an overall “grade” to the market. Rather, the feedback provides information as to what team members appreciated and what they thought might be changed or improved.

Vendors and Products

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

Most important message to Market Manager from this sheet:

Community Members:

- A good mix of different products, nice group of different food products
- More clear sign for the restroom? Water?
- Great selection of products!
- Vendors are customer focused!
- Great mix of goods available
- The variety is excellent across the board

Farmers Market Commission Members:

- 11 am & produce vendors still have a lot to sell.
- Great diversity of products, great quality of crafts.
- Love addition of youth vendors.

Most significant observation I will take back with me:

Community Members:

- Very sizable market, one of the best in Idaho
- You can't see everything in just one visit.
- Range of vendors / skill/resources for display
- People linger and also really use this place to shop, socialize and be at a place.
- Happy people everywhere

Farmers Market Commission Members:

- Lots of shoppers & they keep coming
- I am surprised that more of the vendors don't have their farm or business name more visible on their booth.

What I appreciated about the Market:

Community Members:

- Farmers' market is one of the major attractions in town. It contributes significantly to the local community.
- We should make every effort to support its development.
- Lots of family owned vendors & products
- There is a diverse mix of products available – plenty of produce, but also a range of crafts and prepared foods. Everything I saw was well presented and seemed of fine quality
- An example of customer service – a woman ordered 5 plums and the vendor threw in a couple extra for free.
- Interactions I observed were friendly.
- Its pretty varied. I liked the assortment available.
- The crowd is great and the farmers and shop owners are quick to share their story if you stop and talk to them.
- Their displays were clear; some vendors were simple (corn) or sat there w/o a sold out sign (blueberry? Huckleberry?)
- Variety of fresh produce
- Prepared food variety

Farmers Market Commission Members:

- Amount of choice options
- Knowledge of produce vendors.
- A wonderful place to gather. Everyone looks happy even in the heat.
- Produce variety & all looks good.
- Diversity & quality are excellent!
- The addition of UI College of Ag (and other colleges) is an excellent addition to market.

Changes or improvements that may be needed:

Community Members:

- More promotion for people in the region beyond Moscow!
- Some diversity of food (Chinese food, Indian, others, not just hamburger or cookies)
- Perhaps more advertising (social media...market & vendors, more sign advertising)
- Some displays/signage is campier than others, but I don't see this a bad thing necessarily.

Farmers Market Commission Members:

- Another corn vendor?

Physical Site

Access, parking, flow of people, liability issues, organization

Most important message to Market Manager from this sheet:

Community Members:

- Main street location is essential!
- Main Street wide enough to accommodate crowds
- I think it is great. Much better than other towns/cities I've been at.
- Main St. just south of 5th is a bottleneck. The vendors on either side of the street are closer to each other than anywhere else.
- May provide more instruction for parking!
- Traffic congestion would be an issue if there are more visitors

Farmers Market Commission Members:

- Crowded but not bogged down – flow is manageable.
- Flow of traffic good, might use signage to direct traffic up to 5th St. booths

Most significant observation I will take back with me:

Community Members:

- Don't be afraid to expand the market.
- It is easy to access & navigate this market.
- Site is great / at the best location in town.
- Parking needs more work.

Farmers Market Commission Members:

- Lots of families & visitors
- I noticed rotation of vendors from 5th street to Main. Would be curious about vendors comparative sales – how did they do on 5th St?

What I appreciated about the Market:

Community Members:

- Community focused event!
- Broad community support

- There is plenty of room for people to navigate on main street – even when there are a lot of people.
- If people want to by pass heavy crowds on the street, they use the sidewalks instead, which are largely open.
- I am from NYC. The crowds that are attracted here remind me of that.
- Plenty of room to move through the entirety of the market for the most part.
- Multiple ways to enter/exit.
- Parking is easy to find, especially if you don't mind walking a few blocks.
- The addition of the public restroom is a great improvement.
- More information is supplied for the market's location.

Farmers Market Commission Members:

- Space layout. No matter what people say about Main St. vs. Jackson lot – Jackson was so much worse.
- Non-profit / free speech area gives lots of diversity
- Very clean market.
- Appreciate tables for people to sit in shade and off to the side (not in middle of market)

Changes or improvements that may be needed:

Community Members:

- Keep community leaders involved in the market – maybe a booth for community leaders to man.
- Keep governmental leaders involved as well.
- Traffic + pedestrians + issue at 6th street
- Perhaps more shade in mid-summer
- Parking is always tough downtown. That said, I saw several people in the market who use a wheel chair or other assistive mobility device – so access must be at least okay for people w/ physical disabilities.
- Can get congested around 5th & Main to the south.
- Stollers cause congestion/block flow
- Could use more seating for eating prepared food
- Recycling a& composting bins are poorly marked, could use more of them.
- More parking or guidelines for parking.
- May organize some public bus services for the market?

Farmers Market Commission Members:

- Some people on Fifth St. but need more
- No music playing 9:30-11 this week
- More use of larger signage?
- Didn't see list of musicians today (??)

- Signs pointing out “gaps” to enter downtown businesses. Encourage shopping at other downtown businesses.
- Pretty hot in sunny locations.
- Any way to add shade cloths above vendors in sunny area (from building to building) (just thinking outside the box)

Atmosphere

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

Most important message to Market Manager from this sheet:

Community Members:

- Keep up the good work!
- Good mix of music, events and fun activities.
- Friendly atmosphere
- Market is a draw for a very diverse range of people

Farmers Market Commission Members:

- Great atmosphere with activities, music, education, information, food and products

Most significant observation I will take back with me:

Community Members:

- Happy people meeting friends everywhere
- Keep the market as a major cultural attraction
- Community meeting venue
- My kids liked the grasshopper cookies or whatever it was CALS was serving

Farmers Market Commission Members:

- Lots of different ag/food related things for customers to get involved in.

What I appreciated about the Market:

Community Members:

- Overall, plenty of space to move through the market, even at peak times.
- Hard to find someone having a bad time.
- “Eat Smart” demonstration was great
- Good to see City of Moscow officials supporting & enjoying the market.

- Fund buskers playing at appropriate volume.
- Give opportunities for local farmers
- It helps the city be more appealing
- Liked the music and entertainment!
- Family friendly, lots of children
- Entertainment is very important
- Make local downtown businesses feel welcome
- I saw a diversity of people – from very young families to elders, people w/ disabilities, people from a variety of countries, people expressing different ethnicities and religions – all seemed relaxed and welcome.
- I also talked to several people who said they are from out of town.
- I love the chess area!
- The shoppers here are very diverse!

Farmers Market Commission Members:

- Positive feedback from CALS involvement in the Market.
- Music today was at a good sound level.
- People were enjoying themselves
- Very appealing market visually

Changes or improvements that may be needed:

Community Members:

- Very important to maintain inclusion in market activities, bridge local political divisions.
- I've seen handicaps, maybe accommodate handicaps more?

Farmers Market Commission Members:

- Feedback rec'd that the dot poster assessment is a great tool and way to collect data.
- Folks love the farmers market.
- I spoke to four individual people that were not even from the State of Idaho that did the dot poster. How cool is that!!
- Main Street location has been a great improvement!!

General Public Comments

Additions to dot answers, conversation points, comments on survey, market, etc.

Most important message to Market Manager from this sheet:

Community Members:

- Lots of smiles, very few frowns.
- Keep doing this
- Keep the size / variety
- Great job
- Most new visitors are very impressed...awesome!
- Many people come to market for specific products from specific vendors

Farmers Market Commission Members:

- People are enjoying themselves – they love this market

Most significant observation I will take back with me:

Community Members:

- Lots of smiles, very few frowns.
- Product mix / fair / diversity / different type of farm
- Many products sell out fast.
- Market is social and functional

Farmers Market Commission Members:

- How eager/agreeable customers were to do survey!

What I appreciated about the Market:

Community Members:

- “love the music!” – busker @ 5th & Main
- “there’s our Tamales!” – Maria’s Tamales
- Great efforts
- People friendly
- Grown by people who sell it
- Exceptional
- Fresher produce (such as onions)
- Our Saturdays revolve around the market!

- I load up on fruits and vegetables for the week!
- Walking around the market, I heard people commenting/showing others what they'd purchased – one guy talked about getting the last of the huckleberries, another woman showed off lovely flowers. Sharing/showing seemed a conversation starter for other conversations and socializing.
- People telling each other which vendors had what.
- People were on a mission to get what they came for in many cases.
- People liked how the dot survey was conducted.
- It [dot survey] seemed to attract a lot of attention.
- Having multiple volunteers to catch passersby's was affective.

Farmers Market Commission Members:

- In general our market is LOVED.
- Overall – the customers were more than agreeable to take the survey – indicates a high level of investment in the market!!

Changes or improvements that may be needed:

Community Members:

- "Huckleberries sell out too fast."
- "Wish 'that' vendor that was here last time was here today."
- "I need some shade." x2
- Parking, but still ok
- Public parking
- For what it's worth – I overheard one conversation where a guy was complaining about produce prices at the market.

Farmers Market Commission Members:

- People wanted to put multiple dots on Q31 during 11:00 hour (see Colette)
- There was a long break between demo food and music – a couple of people commented on why no music today.
- Not sure the main stage is best place for chef demonstrations?