Growing Customers at the Farmers' Market: Testing Marketing and Advertising Strategies for Increasing Customer Visits and Producer Sales

Test various promotional strategies and determine which combinations of community outreach and media use are the most cost-effective in encouraging consumers to patronize local farmers markets.

Final Report

Market Thymes

A Publication of the Pacific Coast Farmers' Market Association — Special Report – 2009

Two-Year Study Explores Advertising Impacts and Reveals Buying Habits of Farmers' Market Shoppers

An innovative study conducted by the Pacific Coast Farmers' Market Association (PCFMA) has revealed important details on customer buying habits and responses to advertising by farmers' markets.

In September 2006, PCFMA was awarded a grant from USDA's Farmers' Market Promotion Program for a project entitled "Growing Customers at the Farmers' Market: Testing Marketing and Advertising Strategies for Increasing Customer Visits and Producer Sales."

The project was designed to help farmers' market operators develop and implement more effective and cost-efficient promotional activities by testing different marketing and advertising strategies in farmers' markets operated by PCFMA in the San Francisco Bay Area, then measuring the effectiveness of each strategy on its ability to bring customers to farmers' markets, encourage repeat visits and increase customer purchases.

More than 4,600 customer intercept surveys were completed at eight different farmers' markets in 2007 and 2008. The surveyed farmers' markets were:

- Alameda on Tuesday morning
- Alameda on Thursday evening
- Brentwood on Saturday morning
- Cupertino Square on Friday morning
- Danville on Saturday morning
- Fairfield on Thursday evening
- Fillmore (San Francisco) on Saturday morning
- Jack London Square (Oakland) on Sunday morning

In addition to exploring the impact of advertising and marketing strategies, the surveys revealed attitudes and buying habits of farmers' market shoppers, allowed for a demographic comparison of shoppers to community residents, and facilitated an estimate of the economic impact of farmers' markets on surrounding businesses.

The four-phase project included: collection and analysis of baseline data; development and implementation of marketing and advertising strategies; collection and analysis of follow-up data; and distribution of project lessons to peer organizations.

Collection of Baseline Data

Baseline data was collected from 2,070 customers through customer intercept surveys conducted over 19 days in late July and early August of 2007.

Staff from PCFMA and a temporary agency approached adult shoppers and handed them a clipboard with a survey form and pen. In rare instances staff recorded verbal responses from the shopper. Each survey included a $2 incentive coupon toward any purchase in the farmers' market. Market managers provided estimated adult crowd counts for all survey days, suggesting a 12.3% response rate across the eight farmers' markets in 2007.

Implementation of Strategies

Using the results of the baseline surveys, various marketing and advertising strategies were selected for testing. In Fairfield and Brentwood, electronic media advertising was tested. For Danville and Jack London Square, print media advertising was tested. With Cupertino Square, community sponsorships were tested. In the Fillmore, mass transit advertising was tested. The Tuesday morning and Thursday evening farmers' markets in Alameda were designated as

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Report Highlights

- Farmers' market shoppers are dedicated locavores. When forced to choose, they are more attracted to "local" produce than "organic" produce. *Page 3*
- Farmers' markets attract a diverse customer base that in many ways reflects their communities, though in all markets some groups are better represented than others. This diversity defines the current character of markets and presents opportunities to attract new customers from under-represented groups. *Page 4*
- Advertising does attract new shoppers but the cost of attracting new shoppers can be significant. *Page 8*
- When asked to choose between organically-grown and conventionally-grown produce, farmers' market shoppers choose organics and are willing to pay more for it. *Page 12*
- Farmers' markets are successful economic generators, bringing in shoppers that spend money at surrounding businesses, spurring significant economic impacts. *Page 14*

Building Customer Loyalty Pays Off at Farmers' Markets

The more often shoppers visit a farmers' market, the more they are likely to spend. Strategies that encourage periodic shoppers to become weekly shoppers can have a bigger pay-off than strategies to attract new shoppers.

Customer surveys conducted by PCFMA in 2007 and 2008 show the importance of weekly and long-term shoppers. In both years, those who shop the market more often and who have been shopping for a longer time spend more money in the farmers' market.

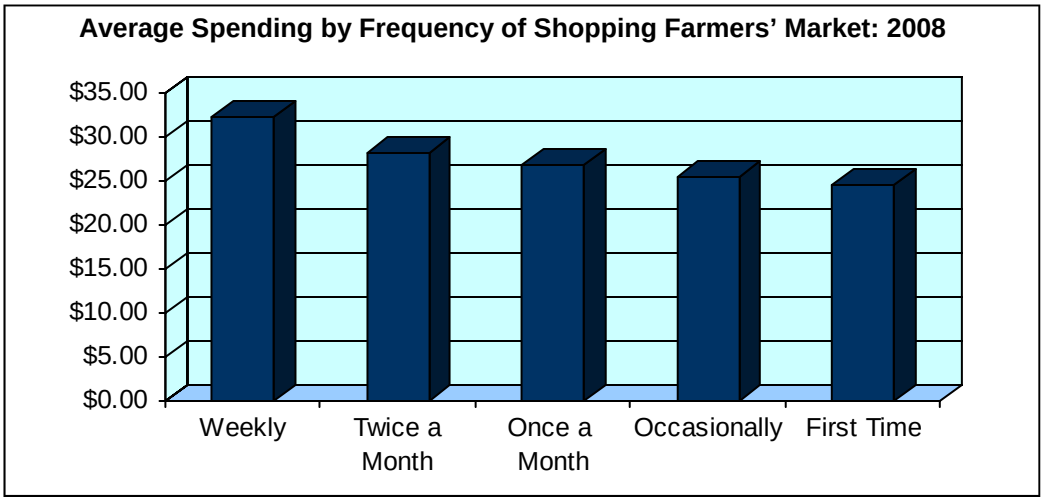
In 2008, the average spending of weekly shoppers was $32.11, 14.3% greater than the average spending of bi-monthly shoppers.

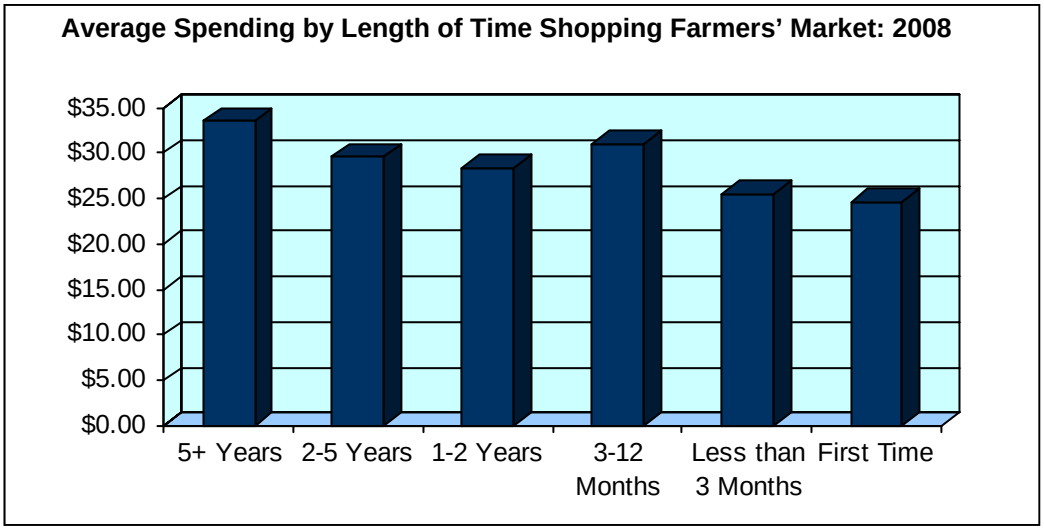
The higher average spending of weekly shoppers than bi-monthly shoppers resulted in $41,000 of additional expenditures for the eight survey days alone – $330,500 instead of $289,000. On those same eight survey days, first-time shoppers spent only $35,800.

The additional spending by weekly shoppers adds up over time. For example, Brentwood had the lowest rate of weekly shoppers, 46.5%. If 20% of the bi-monthly shoppers could be converted to weekly shoppers, it would result in over $11,500 in additional income for the farmers over the 25-week market season.

Weekly shoppers were 56.1% of shoppers but they contributed 60.8% of all spending in the farmers' market. First time shoppers were 8.0% of all shoppers, but their spending was only 6.6% of all farmers' market spending due to the lower average amount they spent, just $24.54.

Similarly, those who had been shopping the farmers' market for less than three months, including those shopping for the first time, were 21.1% of all shoppers but totaled only 17.7% of all spending in the farmers' market as their average spending was just $25.05. Those who had been shopping the farmers' market for more than five years were only 28.7% of the shoppers, but with average spending of $33.57, they generated 32.1% of all farmers' market spending.





Customer loyalty and the accompanying higher rates of spending do not preclude shopping at other farmers' markets.

The great majority of farmers' market shoppers shop other farmers' markets in the area. Only 28.0% never shop other farmers' markets.

The rate was highest in Jack London Square where 81.8% also shop another farmers' market – one operates less than a half-mile away on another day of the week. The rate was lowest in Brentwood — 50.3% shop other farmers' markets — where the nearest is 12 miles away.

Those who also shop another farmers' market weekly report higher average spending, $31.33 versus $28.42 for those who never shop another farmers' market.

The higher rate of spending by those who shop the farmers' market more often is due to their purchases of more produce, not due to spending more on what they buy.

Weekly shoppers buy an average of 56.5% of their weekly produce at the farmers' market while less frequent shoppers buy an average of 35.1% of their produce, and first-time shoppers buy an average of 27.9% at the farmers' market.

First time shoppers said they were willing to pay $1.17 per pound for a locally-grown item that would cost $1.00 per pound in the grocery store. All other shoppers, regardless of shopping frequency, are willing to $1.19 per pound.

Analysis of 4,611 customer surveys conducted by the Pacific Coast Farmers' Market Association in eight San Francisco Bay Area farmers' markets, 2007-2008.

Desire for "Local" Drives Farmers' Market Shoppers

More than three-fourths of farmers' market shoppers say that if they have to choose between a locally-grown product and an organic product, they will choose the locally-grown product.

Of those who buy only conventionally-grown produce, 96.7% value locally-grown over organic. The same is true for 84.4% of those who buy both organically-grown and conventionally-grown produce. And even 63.3% of those who buy only organically-grown produce value local over organic.

Those who value "organic" over "local" are willing to spend more on organic products than those who value local over organic. Those preferring organics will pay an average of $1.39 per pound for an organic item that costs $1.00 per pound conventionally grown, while those preferring local will pay $1.27 per pound, still a substantial premium for organic.

Shoppers – whether prioritizing locally-grown or organics – are willing to pay a 20% premium for locally-grown products in the farmers' market versus a similar product in the grocery store.

Those valuing locally-grown purchase an average of 48.4% of their weekly produce at the farmers' market, spending an average of $29.71. Those valuing organics purchase an average of 46.3% of their weekly produce at the farmers' market, spending an average of $31.76.

We can conclude that "local" is an important buzzword for farmers' market shoppers, with potential to have a strong impact in market advertising, especially among shoppers without a strong preference for organic products.

In addition to assessing preference for locally-grown and organics, the surveys also examined customer attitudes towards the cost, the health and nutrition, and the ease of preparation of their food.

Concerns over Food Cost

Cost is not a driving factor for most farmers' market shoppers, but it remains an important factor for a significant percentage of shoppers.

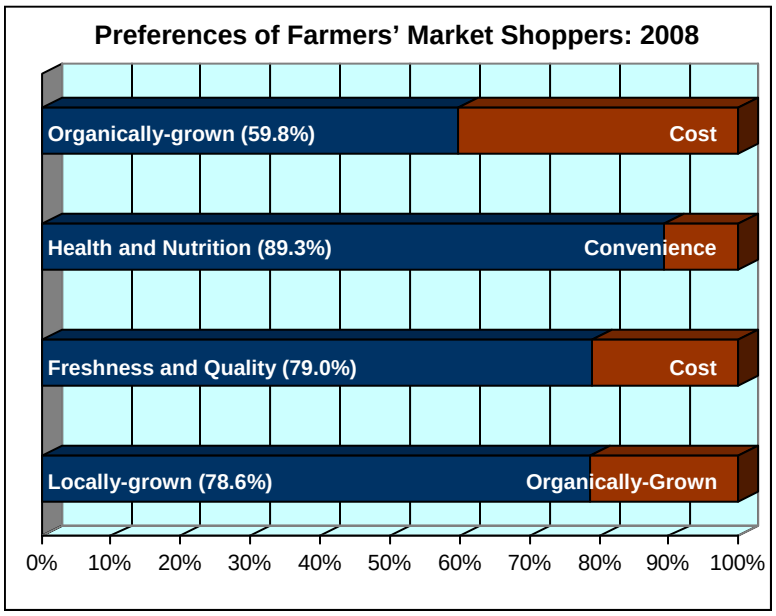
Nearly 60% of shoppers indicate that buying organically-grown produce is more important than cost. And nearly 80% say that freshness and quality are more important than cost.

At least half of all shoppers in each income group (see page 4) say that organic is more important than cost, though cost is less of a factor for those with higher incomes – 49.5% of those with household incomes under $35,000 say cost was the more important factor, compared to only 32.4% of those with incomes above $150,000.

Similarly, while most shoppers in each income group say freshness or quality is more important than cost, a third of shoppers with incomes under $35,000 say cost is more important, compared to only 13.6% of those with incomes above $150,000.

The average cost-conscious shopper – for whom cost is more important than either organic or freshness and quality – is willing to pay $1.22 per pound for organic, less than the $1.32 per pound reported by other shoppers. The cost-conscious shopper will pay $1.14 for locally-grown, less than the $1.22 reported for other shoppers.

These cost-conscious shoppers purchase an average of 44.8% of their weekly produce in the farmers' market, spending $26.65 on average. Other shoppers, not as concerned with cost, spend $30.38 on average in the farmers' market for 48.4% of their weekly produce.



More than one-in-five cost-conscious shoppers – 22.9% – plan to buy only organic produce while 41.3% plan to buy both organic and conventionally-grown produce. This suggests that cost-conscious shoppers are able to purchase at least some organic products at affordable prices in the farmers' market.

A full third – 35.8% – of cost-conscious shoppers plan to buy conventionally-grown products only, but only 5.9% of shoppers less concerned about price will do the same. Clearly, higher prices for organic products limit many cost-conscious shoppers to conventionally grown products.

Food for Health, Not Convenience

Farmers' market shoppers are challenging the national trend toward convenience foods. Nearly 90% believe the health and nutrition of the food is more important than convenience or ease of preparation – three times the rate found in a national consumer study.

The Campbell Soup Company found that only 29.7% of households cited "healthy/nutritious" as one of the reasons for selecting their main course dinner choice. Instead, American households deemed various convenience factors as more important in their selection:

(Continued on page 15)

Analysis of 4611 customer surveys conducted by the Pacific Coast Farmers' Market Association in eight San Francisco Bay Area farmers' markets, 2007-2008.

Farmers' Market Shoppers Reflect the Diversity of their Communities... But Significant Gaps are Evident

In many ways farmers' markets are a reflection of their communities, attracting shoppers of every age, ethnicity, gender, income and educational level. PCFMA's customer surveys found all of these groups shopping at the farmers' markets, and the mix of groups varied from market to market. The most likely shopper is white, over age 45, female, college educated and above average income. However, in any given market, the story may be different.

In its analysis of farmers' market surveys in 2007, PCFMA organized its demographic data for each market around the concept of "target area" – an area whose zip codes included at least 60% of all adult respondents. (See page 7 for a detailed overview.)

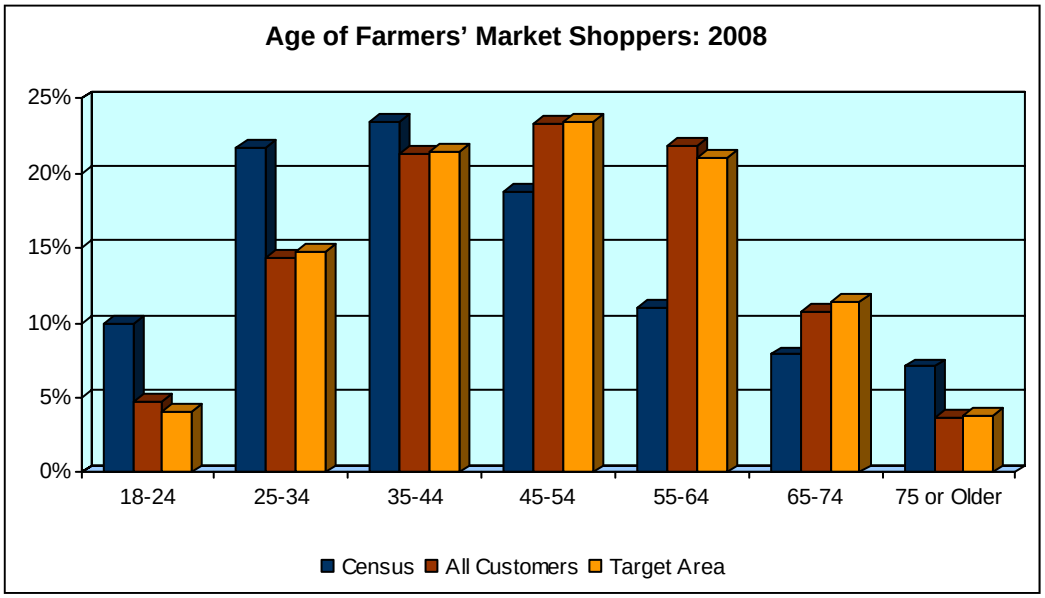
The demographic data for each market's target area was compared to 2000 U.S. Census data for the same target area.

This analysis was repeated with 2008 survey data. The target areas remained the same for five markets in 2008. Yet, based on the 60% threshold of the shopper population, the target areas for three farmers' markets changed in 2008. As a result the community demographics that the survey results are compared against changed from 2007 to 2008. It is impossible to say if one target area or the other is a better reflection of the market's customer base but it does reflect a key element inherent in markets: change.

Changes in Target Areas

The target area changed in 2008 for three markets studied: Fillmore, Cupertino Square and Jack London Square. These changes, amid other circumstances, affect the way customers' survey responses are seen in relation to target area demographics.

A new weekend farmers' market has opened to the southwest of the Fillmore market, causing a shift in Fillmore's target area to the northeast. The new target area has fewer whites – 57.2% versus 61.0% – and more Asian and Pacific Islander shoppers – 23.6% versus 19.0%.



In 2007, 61.3% of Cupertino Square shoppers came from three zip codes. When that dropped to 56.1% in 2008, a fourth zip code was added to reach the 60% threshold, causing some slight change in the census data for the target area. Whites and Asians each dropped as a percentage of the population while Hispanics grew slightly.

Jack London Square is unique among the eight farmers' markets studied in combining elements of both a destination marketplace and a neighborhood farmers' market. Its location along the Oakland Estuary makes it a popular tourist destination while high-rise and live-work developments in close proximity to Jack London Square are providing a growing neighborhood base to shop the farmers' market.

Jack London Square experienced the most dramatic change in its target area. It gained two new zip codes and lost its downtown Oakland central business district zip code. The target area of 60.6% of its shoppers now encompasses 10 zip codes, a reflection of small urban zip codes and the substantial tourist base – 18.6% of shoppers live more than 10 miles from Jack London and 3.5% of shoppers on the survey day live outside of California.

While the change in Jack London's target area is dramatic on a map, the target demographics shifted only slightly. Whites decreased from 37.3% of the target area population to 35.5%, African-Americans increased from 23.5% to 26.6%, Asian and Pacific Islanders decreased from 22.6% to 20.8% and Hispanics increased from 11.6% to 12.1% of the target area population.

Shoppers by Age

Data from PCFMA's 2008 surveys show that farmers' market shoppers tend to be older than the general population. Those ages 18 to 34 are significantly under-represented while those ages 35 to 44 tend to be slightly under-represented. Those 45 to 74 tend to be over-represented, with the most significant over-representation found among those ages 55 to 64. Those over 75 are less likely to shop. This pattern is most pronounced at the weekend farmers' markets.

Weekday farmers' markets generally follow these trends with the exception of those ages 35 to 44 being equally represented in the farmers' markets and the target population.

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Evening farmers' markets differ. Those ages 25 to 44 are slightly over-represented, those 45 to 54 are somewhat under-represented and those ages 55 to 64 are again over-represented.

Shoppers by Race and Ethnicity

In the 2008 survey, as in 2007, ethnic minorities were found to be less likely to shop farmers' markets than whites. Whites are less than half of all residents – 47.7% – yet they make up nearly two-thirds of all shoppers – 65.1%. The Bay Area's three largest ethnic groups were each under-represented among shoppers at all eight farmers' market combined. Asian and Pacific Islanders are 22.3% of population within the target areas, but only 15.7% of shoppers. African-Americans are 14.1% of the population but only 8.6% of shoppers. And Hispanics are 11.5% of the population in the target areas, but only 6.0% of farmers' market shoppers.

However, the survey found four notable exceptions to these minority shopping trends, demonstrating that the overall results from the eight markets studied may be dependent upon market location, another demographic variable such as income, or an issue not studied.

In Brentwood where Asian or Pacific Islanders are only 3.1% of the population, their market turnout rate jumped from 1.3% of shoppers in 2007 to 8.7% in 2008. While short of their 28.8% share of the populace, Hispanics also grew from 10.5% of shoppers in 2007 to 19.4% in 2008. .

In Fairfield, African-Americans and Asians were over-represented in 2008. African-Americans are 25.6% of shoppers but only 15.3% of the population. Asians are 15.4% of shoppers and 13.1% of the population. Whites were under-represented – 37.8% of shoppers while 44.4% of the population. Hispanics doubled in number at market from 8.1% in 2007 to 16.0% in 2008, just shy of their number in the target area, 18.9%.

Asian and Pacific Islanders remain highly represented at Cupertino Square. They are 42.4% of farmers' market shoppers and 36.6% of the population. Indians and South Asians are also over-represented, 11.5% of shoppers and 8.5% of the population. Whites were fairly represented while Hispanics were under-represented, 0.7% of shoppers while 8.3% of the target area population.

African-Americans continue to be over-represented in the Fillmore in 2008 as they were in 2007; while they dropped from 17.5% to 13.3% of the shopper base, they are only 8.7% of the target population. Asians increased from 7.2% to 10.1% of shoppers, but are still under-represented given they are 19.0% of the population. Whites are over-represented with 71.5% of shoppers, a slight increase from 70.1% in 2007. Whites are 57.2% of the population.

While these four markets stand out for their over-representation of minority shoppers, Jack London Square stands out for its low turnout of minority shoppers. White shoppers continue to be greatly over-represented. They were over two-thirds of the shoppers – 67.1% - though they are only 35.6% of the population. African-Americans are significantly under-represented at 7.9%, versus 26.6% of the population, while Hispanics are 4.3% of shoppers, versus 12.1% of the population, and Asians are 17.0% of shoppers versus 20.8% of the population.

Shoppers by Gender

Data on respondents by gender remained consistent from 2007 and 2008, with a dramatic over-representation of 73% women shoppers.

Female respondents outnumbered males in all eight farmers' markets surveyed – from a low of 65.2% in Fillmore to a high of 84.1% in Brentwood – clearly showing female shoppers far surpass men.

The actual male-to-female shopper ratio may be somewhat closer than the results show since survey staff found women more willing to complete the survey.

Women were only slightly more likely than men to shop in a group, by 58.8% to 55.1%, and to shop with children, 47.5% to 39.2%.

Shoppers by Income

Data by household income reflects a strong presence of residents from every income level at the eight markets studied, collectively. Probably no other sector of the U.S. retail environment can claim such a widespread distribution, creating

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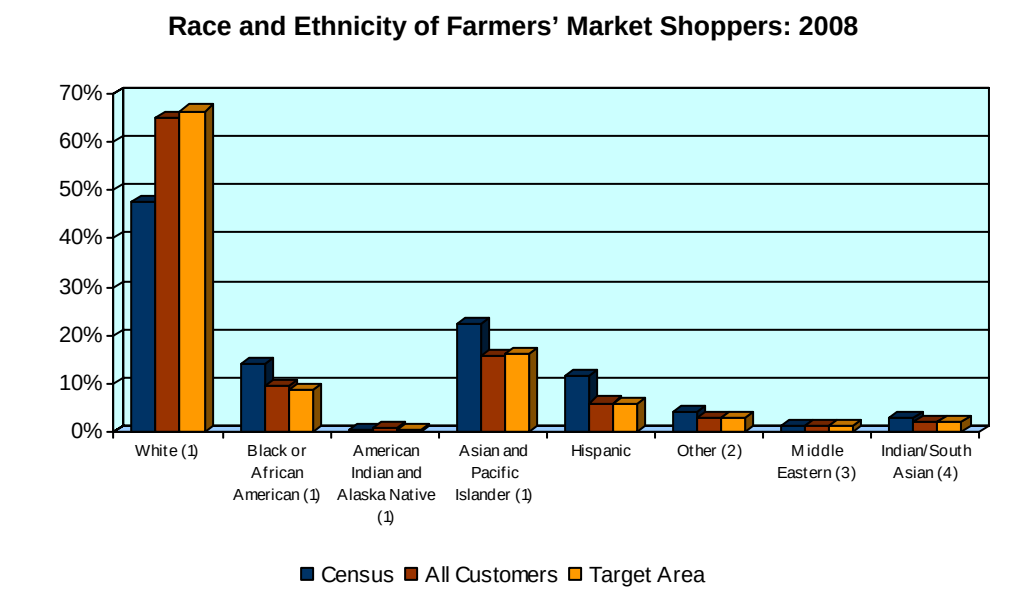

Notes: (1) Non-Hispanic (2) Includes Census categories of Other and More than One Race (3) Includes Census Afghan, Arab and Iranian Ancestry (4) Includes Census Asian Indian and Bangledeshi race groups.

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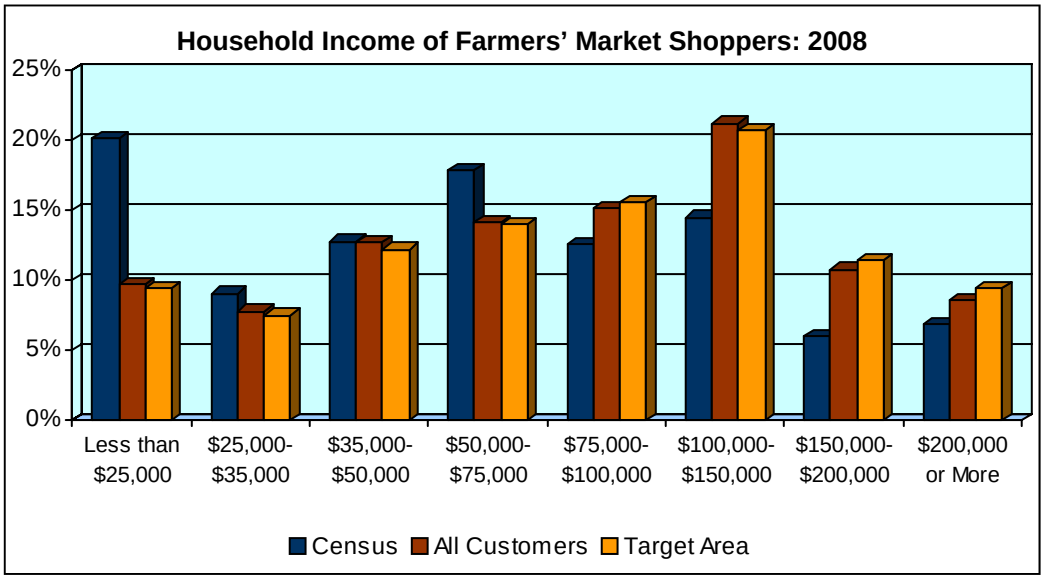
environments where the very poor and extremely wealthy can bump elbows and share recipes while food shopping.

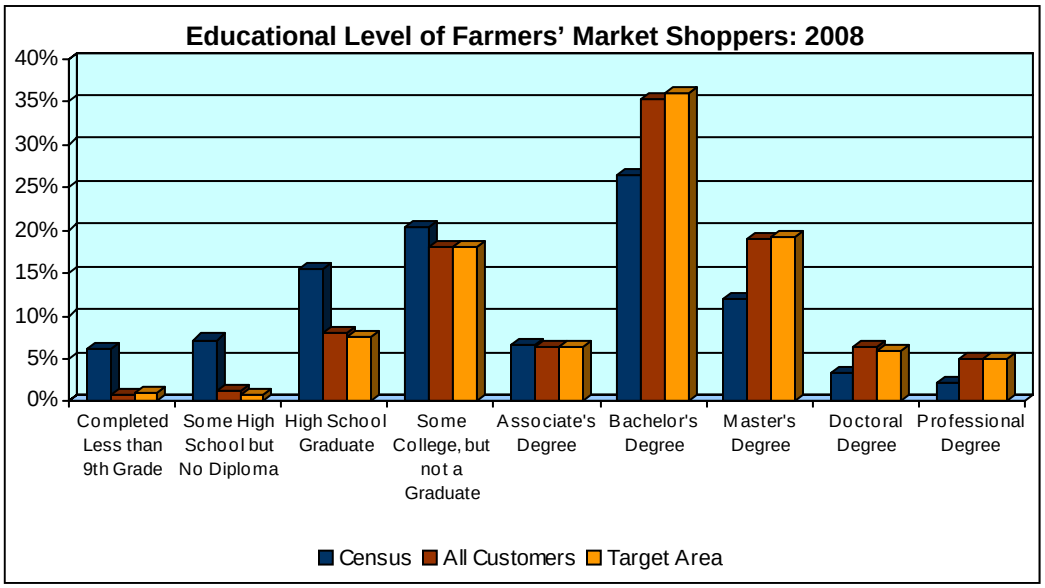
The most surprising finding of the study was the shift from 2007 to 2008 towards more high-end shoppers and fewer low-end shoppers overall. Those with total household incomes above $150,000 rose five points from 15.8% to 20.8% of all shoppers, while those with incomes under $35,000 dropped four points from 21.0% to 16.9% of all shoppers in 2008.

Five of the eight markets studied witnessed this increase in shoppers with household incomes above $150,000 while six markets saw the decline in incomes below $35,000.

Overall, shoppers from all household income categories under $75,000 – 44.3% of all shoppers – are less well represented and those above $75,000 are more highly-represented than in the eight target populations as a whole.

Not surprisingly, average shopper expenditures increase with household income. Those with incomes above $200,000, for instance, spend nearly double – $40.51 – that spent by those with incomes below $25,000 – $21.39.





Shoppers by Education

Shopping patterns by educational level remained consistent from 2007 to 2008. Those with a high school diploma or less are highly under-represented among customers, 9.6% versus 28.7% of the target area populations. Those with some college or an Associate Degree were narrowly under-represented. Those with a Bachelor's or advanced degree are all highly over-represented among shoppers.

Those without a college education shop the farmers' market an average of 3.06 weeks per month and spend an average of $26.22 weekly. Those with a Bachelor's or higher degree shop the farmers' market with the same frequency – 3.09 weeks per month – but spend 22% more weekly, averaging $31.99.

Income and education among farmers' market shoppers are closely correlated – those with more education tend to earn higher incomes – just as they are among the general population. Of these two characteristics, income is a better predictor than education of how much a shopper spends.

Conclusions

It is critical for farmers' markets to understand who currently makes up their customer base and who does not. This information allows them to develop a special event, marketing campaign or change in operations that better serves current customers or that effectively targets those not yet shopping the market, encouraging them to become regular shoppers.

The study found shoppers from certain ethnic and age groups were more responsive to particular advertising strategies. (See page 13.) This suggests that it is possible for targeted campaigns to effectively reach particular audiences.

While this study looked for groups that were over- or under-represented, parity with community demographics does not need to be a market goal. As the study showed, farmers' markets like the Fillmore, Cupertino Square and Fairfield that make a strong connection with a segment of the population and serve their needs well can be successful.

Finally, the strong turnout by female shoppers should not be overlooked. As nearly half of women shop with children, messages stressing farmers' markets as family-friendly outings could be effective in encouraging visits by women.

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An Overview of PCFMA's "Target Areas" Methodology

Demographic information on farmers' market shoppers was collected through five survey questions covering age, gender, ethnicity, educational status and household income. (The analysis of demographics of farmers' market shoppers begins on page 4.)

To determine if farmers' market shoppers reflected their community, a demographic profile of the surrounding community was developed by defining the "target area" in which most farmers' market shoppers live.

Survey respondents were asked their home zip code. Results for contiguous zip codes were added, starting with the most reported zip code and continuing in descending order until a target area of 60% or more of the responses was built for each market.

The 60% figure was arbitrary; a different level would have yielded different results. Overall, 67.4% of responses were in a target area, ranging from a low of 60.6% in Jack London to a high of 86.4% in Alameda on Thursday.

Data from the 2000 U.S. Census by zip code was summed for each target area and compared to data from the surveys for the same target areas.

Surveys without a zip code – 9.9% of all responses – were not included in the demographic analysis, though they were included in the analysis of other survey questions.

These target areas were also used to estimate shoppers' proximity to the farmers' market, as seen on page 13.

Target Areas of Farmers' Markets in PCFMA's Survey Project: 2008

2008 Survey Results	Alameda (Tuesday/ Thursday)	Brentwood	Cupertino Square	Danville	Fairfield	Fillmore	Jack London Square
Zip Codes in target area	1	1	4	3	2	2	10
Responses with zip codes	213 / 260	163	239	440	243	270	462
Responses in target area	76.2% / 86.4%	65.0%	67.4%	65.7%	66.3%	61.1%	60.6%
Square miles of target area	8.15	113.82	50.41	55.67	258.58	2.14	47.48
Major city of target area	Alameda	Brentwood	Cupertino	Danville	Fairfield	San Francisco	Oakland
City population*	72,259	23,302	50,546	41,715	96,178	776,733	399,484
Target area population*	58,561	28,481	193,191	67,186	122,605	89,458	322,354

U.S. Census, 2000

Advertising Does Attract New Shoppers... for a Price

Among the many challenges facing farmers' markets is how to increase shoppers and sales. While there are a myriad of advertising and marketing options that farmers' markets can employ, until now there has been little research into the impact or cost-effectiveness of these strategies. One of the goals of this project was to see if it is possible to measure the impact of different strategies so that other farmers' markets might better understand which strategies are most effective.

In order to estimate the accuracy of the advertising estimates, each survey included as options several advertising strategies that were not employed for that market. Overall, 85.3% of respondents saw only media that was employed in that market area. Notably, 10.5% saw some media that was employed and some that was not, and 4.2% of shoppers said they saw only media that was not employed.

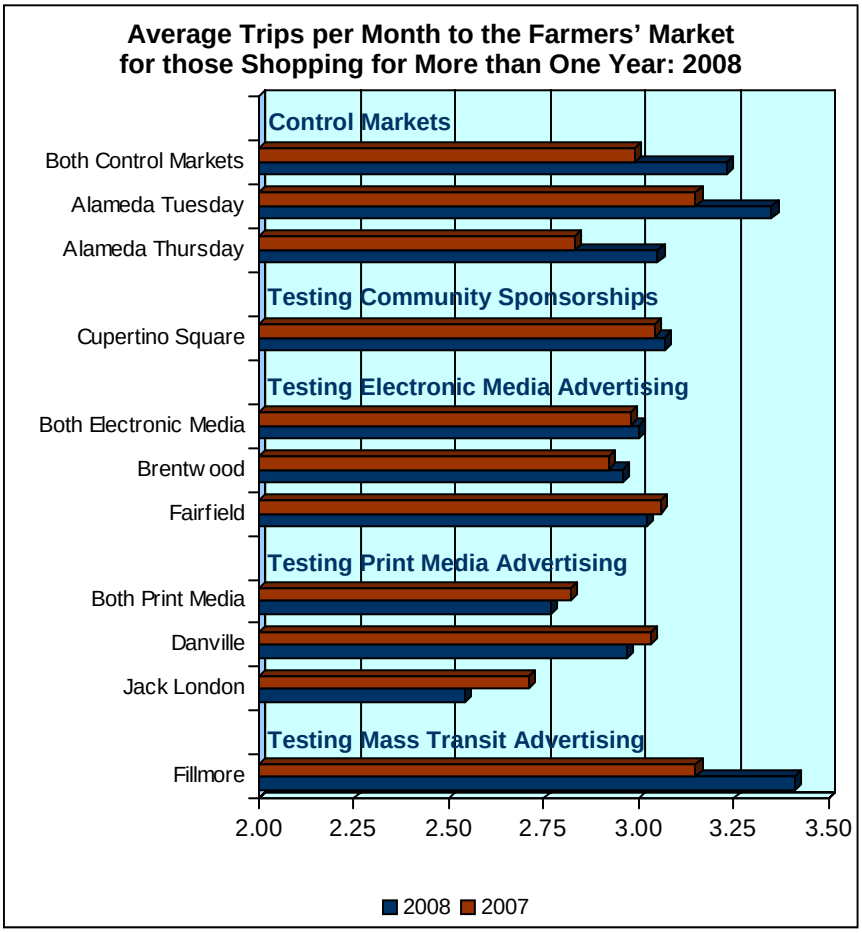
Respondents could choose more than one media strategy from the list so the figures reported below do not add up to 100%.

Word-of-mouth continues to dominate as the most often reported source of information about farmers' markets – 47.9% of shoppers in 2008 and 46.9% in 2007 learned of the farmers' market through word-of-mouth.

Distributing posters to local businesses to promote the farmers' market also generated a high level of response from farmers' market shoppers – 24.4% saw the posters in local businesses in 2008, up from 22.2% in 2007.

The surveys also inquired about two other types of free media: 9.3% of shoppers saw newspaper articles in 2008, and 6.4% saw online listings or postings concerning the farmers' market.

In addition to data on these free strategies which were common across all eight farmers' markets, the project tested advertising strategies in six test markets to measure which were the most effective and the most cost-effective at increasing customer visits, attracting new customers and increasing producer sales.



Increasing Customer Visits

The average crowd count for the months of May to September, as reported by the market managers for all eight markets combined, increased by 2.9% between 2007 and 2008. Half of the markets saw an increase in shoppers, while half saw a decrease. Fairfield saw the biggest increase – 86.0% – to an average of 1,900 shoppers per week. The biggest decline was in Alameda on Thursdays, dropping 21.6% to an average of 670 shoppers per week.

As seen in the chart on this page, the average number of trips to the market per month increased in the control markets from 2007 to 2008, but dropped in all but one of the test markets. (Data is based solely on responses from customers of a year or more.)

The number of visits per month in Alameda increased by .22 on Thursdays and .20 on Tuesdays.

The only test market that saw a larger increase was the Fillmore where the average number of visits per month increased by .26, a substantial rise that translates to more than half of non-weekly shoppers in 2007 visiting the market one extra day each month in 2008. All other markets saw a smaller increase or a small decline in the average number of visits per month.

Overall, those who saw a tested strategy reported a higher average number of trips to the farmers' market – 3.12 trips per month – than those who did not see a tested strategy – 2.83 trips per month.

Attracting New Shoppers

New shoppers – those shopping for less than a year – were 30.3% of all shoppers. The rate of new shoppers was highest in Brentwood, 46.0%, and Fairfield, 43.0%. The rate of new shoppers was lowest in Danville – 16.6%.

New shoppers most often report seeing free media such as newspaper articles, online notices and word-of-mouth, 65.1%, followed by signage, 27.8%. The most frequently seen paid media was print advertising, 10.9%, followed by electronic media

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(television and radio), 6.6%.

Returning shoppers – those shopping for a year or more – were more likely than new shoppers to see both print media, 22.5%, and electronic media, 7.6%.

Increasing Market Spending

Between 2007 and 2008 the average spending by farmers' market shoppers increased by 9.5% from $26.93 to $29.48. All eight markets experienced this spending increase. The largest increases were in Fillmore, 27.2%, and Fairfield, 19.0%, likely due to both the additional advertising and to a more diverse product mix that resulted from the addition of new producers. The smallest increases were in Alameda on Tuesday, 4.5%; Danville, 4.6%; and Alameda on Thursday, 4.8%.

Shoppers who saw one of the five tested strategies in 2008 had average spending 11.0% higher than those who did not see one of the strategies – $33.83 versus $30.47.

Raising Top-of-Mind Awareness

One of the goals of any advertising and marketing strategy is TOMA – "top-of-mind awareness" – which is essentially keeping the product or service advertised at the forefront of shoppers' minds. One survey question was designed to estimate the extent to which a lack of awareness of the farmers' market suppressed attendance by asking non-weekly shoppers the reason they did not shop more often.

The most frequent responses were "too busy" – 34.7% – and "usually shop other farmers' markets" – 20.6%.

The TOMA response ranked third with 16.2% of non-weekly shoppers saying the market is not on their mind. This ranged from a low of 9.6% in Alameda on Tuesday to a high of 29.2% in the Fillmore.

Analysis by Market – Alameda

The two farmers' markets in Alameda were designed as control markets where no testing of any particular strategy was done. In 2007, the top four sources of information about the Alameda markets were word-of-mouth, 49.6%; posters in local businesses, 28.9%; newspaper advertisements, 21.1%; and newspaper articles, 10.2%.

In 2008, a new option that was added to the list of choices – the permanent farmers' market sign along the street – was the most popular choice, seen by 40.7% of shoppers. Word-of-mouth was next, 39.3%; followed by posters, 34.9%; newspaper advertisements, 19.3%; and newspaper articles, 7.3%.

Analysis by Market – Brentwood

In Brentwood, television advertising was the tested strategy and 4.4% of shoppers saw the television ads. This rate was twice as high for returning shoppers – 5.8% for those shopping the farmers' market for a year or more – as for new shoppers – 2.7% for those shopping under a year.

In Brentwood, $6,525 was spent on television advertising, including the cost of production. Attributing all of the cost only to new shoppers, the average cost of attracting a new customer via television advertising was $265.59. By comparison, $3,047 was spent in 2008 to replicate the 2007 print advertising plan for Brentwood. With 21.6% of new

(Continued on page 10)

Impact of Marketing and Advertising on those Shopping Farmers' Market for Less than One Year: 2008

	New Shoppers as Percent of Total	Estimated Count of New Shoppers*	% Responding to Strategy	Estimated Cost Per New Shopper
Control Markets				
Both Control Markets	26.3%	562	NA	NA
Alameda Tuesday	22.5%	331	NA	NA
Alameda Thursday	34.5%	231	NA	NA
Testing Community Sponsorships				
Cupertino Square	29.8%	829	NA	NA
Testing Electronic Media Advertising				
Both Electronic Media Test Markets	44.5%	1,728	6.1%	$128.17
Brentwood	46.0%	909	2.7%	$265.59
Fairfield (both radio and television)	43.0%	819	9.8%	$86.12
Fairfield (radio only)	43.0%	819	2.9%	$90.29
Fairfield (television only)	43.0%	819	7.8%	$73.79
Testing Print Media Advertising				
Both Print Media Test Markets	23.5%	1,472	9.1%	$107.68
Danville	16.6%	511	17.6%	$108.15
Jack London Square	30.1%	962	4.6%	$106.49
Testing Mass Transit Advertising				
Fillmore	37.5%	539	18.4%	$90.91

*Based on average weekly shopper count, May to September.

Analysis of 4611 customer surveys conducted by the Pacific Coast Farmers' Market Association in eight San Francisco Bay Area farmers' markets, 2007-2008.

(Continued from page 9)
shoppers seeing the print ads, the average cost was $15.50 per new shopper.

Television ad viewers spent 16.9% more than non-viewers. However, only 42.9% of television ad viewers were weekly shoppers versus 52.6% of those who did not see the ads.

In the TOMA measurement, 0.0% of shoppers who saw the television ads and 6.7% of those who did not said the farmers' market was not on their mind.

From these results we conclude that television advertising for Brentwood did not encourage weekly shopping and print advertising was far more effective in attracting new shoppers and at a lower cost. But television may be effective in reinforcing existing customers. Television did positively impact top-of-mind awareness and appears to have induced greater vendor sales through higher spending.

Analysis by Market – Fairfield

For Fairfield, both television and radio advertising were tested. Overall, 4.6% of shoppers reported seeing the television advertisements and 2.9% heard the radio ads. The TV ads were seen much more often by new shoppers than by returning shoppers, 7.8% versus 2.2%.

A total of $4,740 was spent on television advertising, including production, for an average of $73.79 per new shopper. A total of $2,175 was spent on radio advertising for an average cost of $90.29 per new shopper.

Of those who saw the electronic media advertisements, 50.0% were weekly shoppers, while among those that did not see the ads, 59.1% were weekly shoppers.

Ad viewers spend 11.6% more than non-viewers and television viewers spend one-third more than radio viewers.

The electronic media did appear to impact TOMA with 0.0% of those who saw the ads saying the farmers' market was not on their mind, compared to 7.7% who did not see the advertisements.

For Fairfield, we conclude that the television advertising was more effective and cost-effective than radio and that it positively impacted TOMA and market spending, though it did not impact shopping frequency.

Analysis by Market – Danville

For Danville, print advertising was tested by expanding the number of publications and the frequency of advertisements. Overall, 30.2% of shoppers reported seeing the print advertisements, an increase from 2007 when 19.2% saw the ads.

In 2008, more returning shoppers than new shoppers saw the ads, 32.8% versus 17.6%.

For Danville $9,709 was spent on print advertising for an average cost of $108.15 per new shopper.

Overall 63.9% of those who saw the advertisements were weekly shoppers while 60.0% of those who did not see the ads were weekly shoppers. The average spending of those who saw the ads was only 1.4% higher than for those that did not.

The ads had little impact on TOMA: 4.5% who saw the advertisements said the farmers' market was not on their mind compared to 5.2% who did not see the ads.

While print advertising for Danville did not influence market spending it had a positive impact on shopping frequency and it was effective in reinforcing the existing shopper base. It was widely seen by new shoppers, but did not result in a large turnout of new shoppers.

Analysis by Market – Jack London Square

For Jack London Square, print advertising was tested by expanding the number of publications and the frequency of advertisements over the previous year and 12.2% reported seeing some sort of print advertising. Overall, 4.8% of shoppers reported seeing the print advertisements that were actually run in two publications.

Unfortunately, a higher percentage, 8.3%, reported seeing advertisements in the Oakland Tribune, where no advertising was purchased. This might have occurred because respondents recalled seeing an advertisement but did not recall where they had seen it.

Nearly $4700 was spent on print media advertising for Jack London Square and 4.6% of new shoppers saw the print advertisements that were run, for an average cost of $106.49 per new shopper.

Of those who saw the ads, 76.2% were weekly shoppers, compared to 48.7% of those who did not see the print advertisements. The average spending by shoppers who saw the ads was 12.7% lower than for shoppers who did not see them.

There was little difference on TOMA with 4.8% of those who saw the ads and 4.5% of those who did not saying the farmers' market was not on their mind.

We conclude that for Jack London Square, the print advertising was not effective in impacting top-of-mind awareness, though it may have contributed to a higher shopping frequency. It was not cost-effective or particularly effective in attracting new shoppers or encouraging market spending.

Analysis by Market – Cupertino Square

At Cupertino Square, community sponsorship of local youth sports programs was tested. No shoppers reported seeing the community sponsorships of local children's sports teams that the farmers' market undertook. Despite this, the average weekly crowd count reported by the market's manager increased 9.8% from 2007 to 2008

While community sponsorships may have benefits such as increasing community goodwill, we found no evidence in this case that it will drive shoppers to farmers' markets.

Analysis by Market – Fillmore

For the Fillmore Farmers' Market, mass transit advertising was tested. Overall, 13.1% of shoppers reported seeing the ads on the sides of buses. The rate was higher among new shoppers, 18.4%, than returning shoppers, 10.1%.

The Fillmore Farmers' Market spent $9000 to advertise on buses,

including the production cost for the advertising materials, for an average of $90.91 per new shopper.

By comparison, $3500 was spent on print media advertising in 2008, replicating the print advertising strategy from 2007. Only 4.1% of new shoppers saw the print ads for an average of $159.09 per new shopper.

Bus ad viewers were more frequent shoppers than non-viewers – 74.2% versus 70.4% shopping weekly. And bus ad viewers spent 21.0% more at the market than non-viewers.

The TOMA impact was also telling: 0.0% of those who saw the bus ads said the market was not on their mind, compared to 10.8% of those who did not see the bus ads.

We conclude that mass transit advertising for the Fillmore was both cost-effective in attracting new shoppers and effective in influencing top-of-mind awareness, which appears to have boosted shopping frequency and market spending. Print advertising was less effective and at a higher cost.

Conclusions

The one strategy that showed the most promise was mass transit advertising in the Fillmore, where increases in crowd count, shopping frequency and spending were all found. Fillmore is unique among the eight markets studied, as it has the lowest percentage of shoppers driving to the market, only 32.9%, and the highest rates of walkers, 55.4% and public transportation riders, 10.0%. While the outlay is not cheap, transit ads can be a wise investment where there is a concentration of walkers and public transit riders who can see the transit advertising.

For farmers' markets considering electronic media advertising, television appears to be more effective than radio, though the results for television were mixed. Television ads were more effective in attracting new shoppers in Fairfield than Brentwood, and while the ads increased top-of-mind awareness, television viewers shopped the market less often than non-viewers.

Print advertising results were also mixed with positive impact on shopping frequency, which has a major impact on farmer income, but no impact on average spending and minor impact on TOMA. Print advertising was more cost-effective in exurban Brentwood than television – one-in-five new shoppers saw the print ads – suggesting that print may be effective in communities with a strong newspaper readership that seeks out community event listings.

Comparing the cost-effectiveness of various marketing strategies based on the number of new shoppers alone, as was done above, provides a consistent basis for comparisons. But it is incomplete; if one accounts for the reinforcing impact of those ads on existing shoppers, which could not be calculated on a dollar cost basis, the expense certainly becomes more reasonable and possibly even feasible for many markets.

Advertising generally has a greater impact on existing customers who are reminded of a market of which they are already aware than on new shoppers who know little or nothing of the market. Comparing strategies, TV ads appear more effective with new shoppers and print ads with existing customers.

In addition to the tested strategies, the project showed that traditional techniques can also be effective. A permanent sign at the market location can serve as a seven-day-a-week promotion for a one-day-a-week market. The permanent sign in Alameda was seen by 38.0% of shoppers on Thursday and 42.9% on Tuesday while the sign in Danville was seen by 25.5% of shoppers.

Posters in local business can be an effective and inexpensive way to remind shoppers of the market. The lowest response to posters was seen at the two markets at commercial centers — Cupertino Square and Jack London Square. At all other markets at least 25% of shoppers said they saw posters for the farmers' market.

E-mail Newsletters Prove Cost-Effective

Among the marketing tools employed by PCFMA across its family of 55 weekly farmers' markets in the San Francisco Bay Area in 2008 is an e-mail newsletter to market customers. These monthly e-mails provide information on the available seasonal products, highlight farmers with those products, promote in-market events such as cooking demonstrations and provide a link to the PCFMA website and its extensive listing of seasonal recipes.

Since the newsletters are used in every PCFMA market and are designed to reach existing customers, not attract new customers – most of the newsletter sign-ups are through sign-up sheets or contest entry forms at the markets – the e-mail newsletters were not included among the tested strategies in this project. E-mail newsletters, however, were included on the list of marketing and advertising strategies that shoppers could select on the surveys to indicate where they had heard about the farmers' market.

Overall, e-mail newsletter recipients are more loyal shoppers in terms of frequency and expenditures. These shoppers spend an average of $34.28 versus $29.39 for others.

With 69.3% shopping weekly, they average 3.21 trips per month while 55.2% of non-email shoppers come weekly, averaging 2.68 trips per month.

E-mail newsletter shoppers also buy more of their weekly produce at the farmers' market – 53.3% on average – than others who purchase 46.3% at the farmers' market.

PCFMA uses a third-party provider that manages the lists and ensures compliance with anti-spam regulations. The cost is $6.38 for every thousand e-mails sent, or less than a penny per message. Even when staff time is factored in, e-mail newsletters are clearly a very cost-effective way of reinforcing visits and purchases among customers.

Organically-grown Produce Dominates Shopping Lists

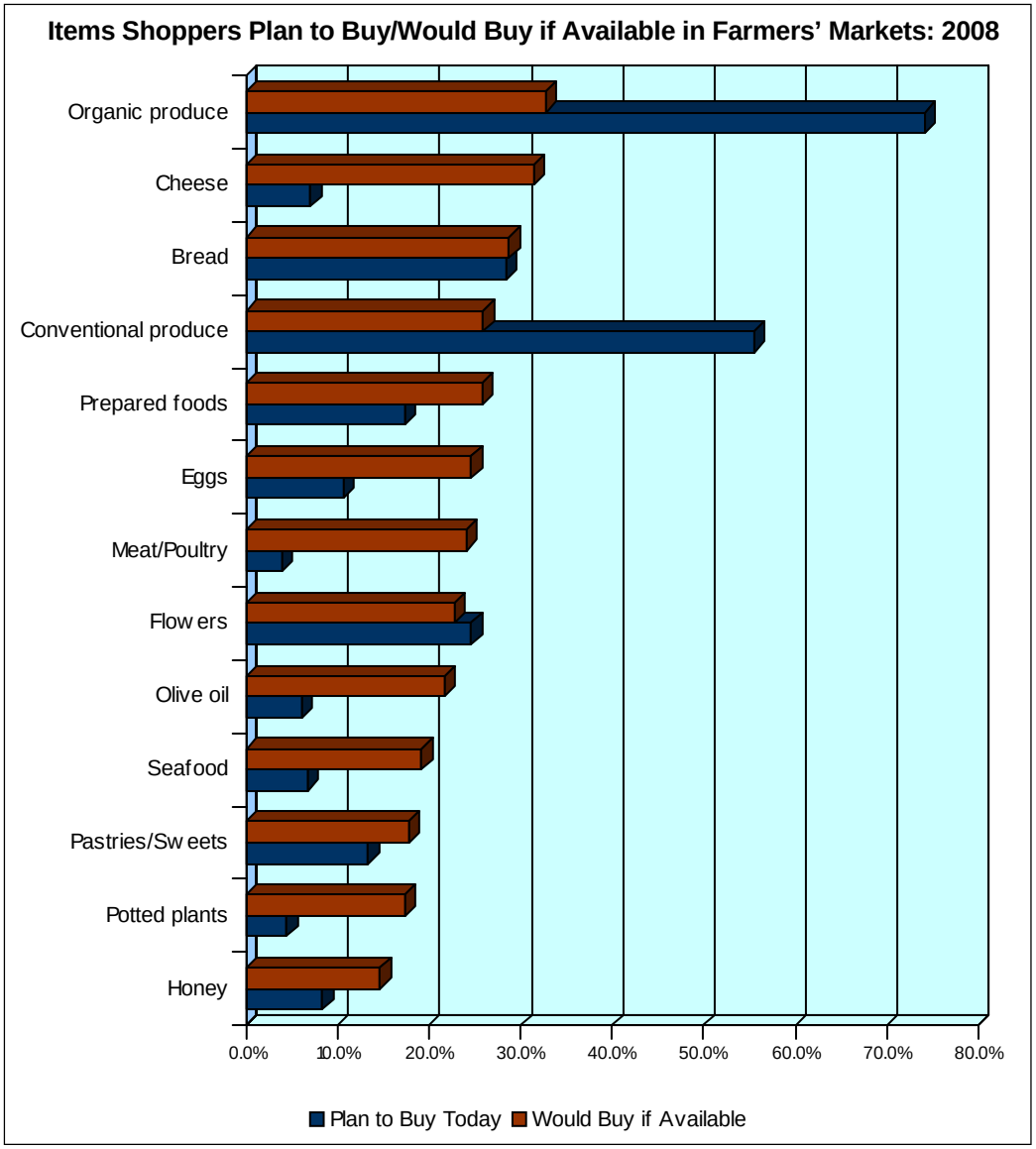
Fresh produce dominates the shopping lists of farmers' market customers. Organically-grown produce was the item that market shoppers most often planned to buy – 76.1% in 2007, and 74.1% in 2008.

Conventionally-grown produce was the second most often selected item chosen by 49.5% of shoppers in 2007. That rose to 55.5% in 2008.

The ranking of the other top five items also remained the same. Bread ranked third, rising from 25.0% in 2007 to 28.4% in 2008. Flowers ranked fourth, growing from 22.3% in 2007 to 24.6% in 2008. And prepared foods such as sauces, kettle corn and ready-to-eat hot foods, ranked fifth selected by 12.7% of shoppers in 2007 and expanding five points to 17.4% in 2008.

The top 10 items on shopping lists were filled out by pastries/sweets at 13.3%, eggs at 10.6%, honey at 8.3%, cheese at 7.0% and seafood at 6.7%, followed by olive oil, potted plants and meat/poultry.

With only four items on the shopping list of at least 20% of customers, and only seven items on the list for 10% of shoppers, there are considerable opportunities to educate shoppers to the full range of products available at the farmers' markets.



Desired Products

Shoppers were asked to identify items that they would buy if they were available so that unmet consumer demands for additional choice or variety could be assessed in the farmers' markets.

The most-desired product was organically–grown produce. However, there was a dramatic 26-point drop from 59.0% in 2007 to only 32.7% in 2008 who said they would buy organics if they were available.

Smaller but notable decreases also hit the rest of the top four desired items. Cheese dropped from 36.6% to 31.4% desirability, nevertheless rising from #4 to #2 just behind organic produce.

Bread, which was the #2 choice in 2007, selected by 39.6% of shoppers, dropped to the #3 choice, selected by 28.7% of shoppers.

Conventionally-grown produce, which was the #3 choice in 2007, selected by 39.4% of shoppers, dropped to #4, selected by 25.9% of shoppers.

Close behind were prepared foods at 25.8%; eggs, 24.6%; meat/poultry, 24.1%; flowers, 22.7%; olive oil, 21.7%; seafood, 19.2;, followed by pastries and sweets, potted plants, and honey.

Non-Produce Shoppers

A significant portion of farmers' market shoppers – 9.4% –were not planning to buy either organically-grown or conventionally-grown produce, but came for other items.

Of these non-produce shoppers, 38.7% planned to buy bread, 28.2% flowers, and 20.4% prepared foods.

Bread was the #1 choice among non-produce shoppers in four of the eight markets studied and the #2 choice in three other markets.

Flowers were the #1 choice in each of the three Saturday morning markets studied, led by Brentwood where 72.7% of non-produce shoppers planned to buy flowers.

Prepared foods ranked the highest in the two evening markets studied – Fairfield with 38.9% and Alameda Thursday where 30.0% of non-produce shoppers came for prepared foods, most likely for ready-to-eat hot foods for a quick and easy meal.

Analysis of 4,611 customer surveys conducted by the Pacific Coast Farmers' Market Association in eight San Francisco Bay Area farmers' markets, 2007-2008.

Proximity Impacts Frequency of Visits

The target area methodology that PCFMA developed to compare farmers' market shoppers to community demographics has allowed an analysis of shopping patterns by proximity to the market.

As explained in detail on page 7, shoppers were asked their home zip code which was used to develop a target area that included at least 60% of shoppers.

Overall, 44.6% of shoppers live in the zip code that includes the farmers' market. Another 20.9% live in another zip code within the target area. And 34.6% live outside of the target area for that farmers' market.

Shoppers living in the market zip code – presumably living close to the farmers' market – are more likely to shop the market regularly, averaging 3.04 visits per month and 65.7% shopping the farmers' market weekly.

Shoppers living in a different zip code within the target area average 2.76 visits per month with 55.0% shopping weekly.

Those living outside the target area average only 2.24 visits per month and only 44.1% shop the farmers' market weekly. These were also much more likely to be shopping for the first time – 14.7% said it was their first visit to that farmers' market compared to 5.0% of those living in the target area.

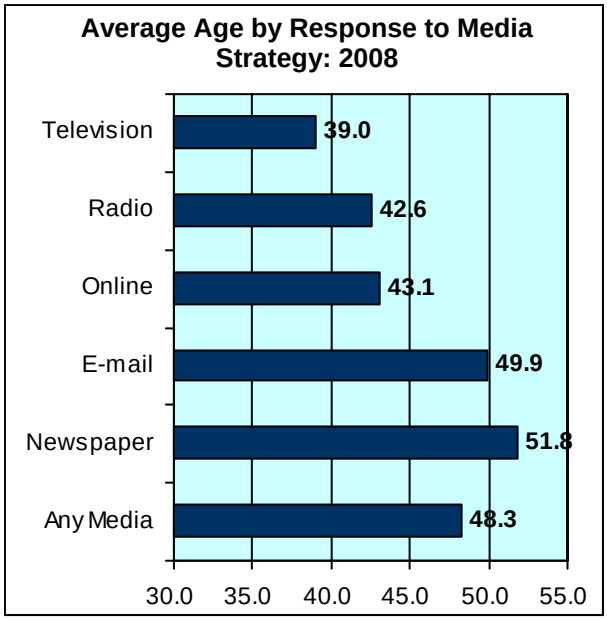
Transportation is also linked to shopper proximity to market. Not surprisingly, the highest rate of those walking and biking was found among those living closest to the market – 73.5% of all walkers (who are 20.6% of all shoppers) and 51.3% of all bikers (3.4% of all shoppers) live in the market zip code. Despite the challenges of navigating public transportation with bags of produce, 67.2% of all transit riders (2.5% of all shoppers) live outside of the target area for their market. Likewise, nearly half – 49.6% – of all shoppers who carpooled (5.7% of all shoppers) live outside of the target area.

Advertising Impact Varies by Age, Race

One of the challenges of designing any marketing or advertising program is deciding which groups to target – whether to devote resources to attracting more consumers that reflect your current base of shoppers, or to devote those resources to diversifying your shopping base.

The results of PCFMA's surveys show that the farmers' markets tend to attract more older shoppers than younger shoppers. (See page 4 for demographic results.) The average age for the farmers' market shoppers was 48.8 years while the surrounding community was 44.8 years.

While the advertising and marketing strategies tested in this project were not selected with the goal of targeting any particular group, the survey results showed that the impact of the strategies did vary by age. Five different strategies were examined and broadcast media drew the youngest viewers – farmers' market shoppers who saw the television ads averaged 39.0 years and radio 42.6 years.



Internet media drew slightly older shoppers. Those seeing online farmers' market information were 43.1 years and those receiving the e-mail market newsletter were 49.9 years old on average.

Newspaper advertising had the oldest respondents at 51.8 years.

The response to various advertising strategies also varied by race and ethnicity. Comparisons were computed only for those shoppers who saw one or more advertising strategies, reducing the overall sample size. Some racial and ethnic groups had insufficient responses to be included in the analysis, so figures were only computed for white, African-American, Latino and Asian shoppers.

Word-of-mouth was the most-often reported strategy for all ethnicities but only a third of Latinos compared to over 40% of other groups said they learned of the market that way.

White and Latino shoppers were the most likely to indicate that they had seen print media advertising – 15.4% of whites and 15.2% of Latinos said they saw newspaper advertisements. Only 10.0% of African-Americans and 8.7% of Asians said they saw newspaper advertisements.

Asian shoppers were the most likely to say they had seen information about the farmers' market online, at 9.0%. Online information was seen by 7.3% of white shoppers, 6.8% of African-American shoppers, and only 4.0% of Latino shoppers.

Asian shoppers, however, were the least likely to receive the farmers' market e-mail newsletter. Only 4.8% read the e-mail newsletter, compared to 8.9% of African-Americans, 8.0% of Latinos and 6.5% of white shoppers.

Overall, the number of respondents who said they saw either TV or radio advertisements was smaller, making estimates by race less precise. Nonetheless, the figures did show a large difference by race with 5.6% of Latinos saying they saw these advertisements, compared to 1.9% of Asians and less that 1% of either African-American or white shoppers.

Analysis of 4611 customer surveys conducted by the Pacific Coast Farmers' Market Association in eight San Francisco Bay Area farmers' markets, 2007-2008.

Farmers' Markets Have Significant Economic Impacts

Farmers' markets are valued as economic generators for downtowns, retail corridors and shopping centers due to the crowds they attract and the consumer spending they spur. In 2008, shoppers spent an average of $18.78 at surrounding businesses and restaurants during their trips to farmers' markets.

The 61.7% of farmers' market shoppers who make local purchases spent an average of $30.42.

The average spent in local shops and restaurants in conjunction with farmers' market visits in 2007.was $26.97, with 56.2% of shoppers making purchases.

In 2008, the average amount spent ranged from a low of $25.04 in Fairfield to a high of $39.14 in Danville while the percent of shoppers supporting local businesses ranged from a low of 45.8% in Cupertino Square to a high of 74.2% in Danville.

The higher percentage of shoppers spending money outside of the farmers' market, the increase in average spending, and the larger crowd counts observed all combined to create a 36% larger estimated economic impact in 2008 than in 2007 – over $340,000 in sales at local businesses on the eight survey days in 2008 versus $250,000 in economic impact on the survey days in 2007.

Those shoppers whose primary reason for coming to the area is to shop the farmers' market (43.5% of all shoppers) generated 44.9% of that economic impact. They contributed more that 50% of the economic impact in three of the farmers' markets studied – 56.1% in Jack London Square, 52.1% in Danville and 51.3% in the Brentwood.

This figure is especially significant as it represents the economic impact most directly spurred by the presence of the farmers' market. These shoppers would probably be the least likely to do other shopping or eating in the area if the farmers' market were not there.

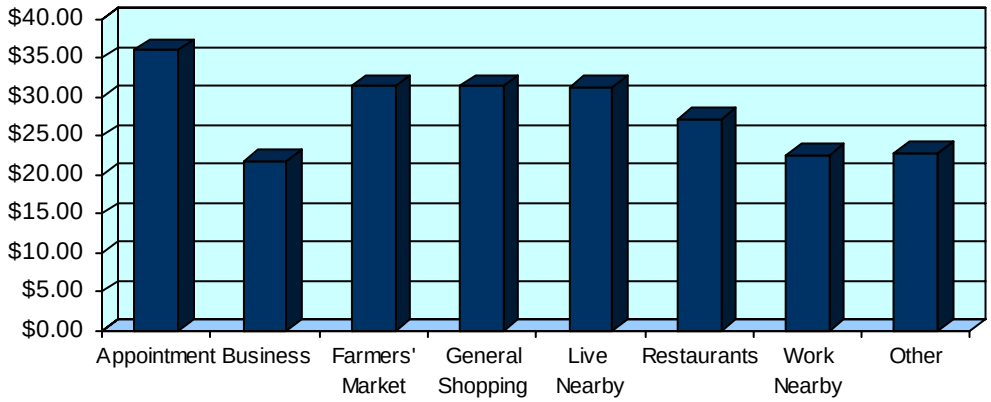
A second finding of significance is that 35.4% of the overall economic impact was generated by those living near the farmers' market. This figure was highest in Alameda on Thursday where 53.8% of the economic impact was generated by neighborhood residents.

The economic impact generated by shoppers coming to the area for general shopping was highest in the two farmers' markets that operate at commercial centers – 10.4% at Cupertino Square and 10.2% at Jack London Square.

Jack London Square was also the only farmers' market in which a notable percentage – 2.8% – of the economic impact came from those who came to the area for restaurants.

The average spending by weekly farmers' market shoppers at local businesses – $31.99 – is 9.9% higher than that by monthly shoppers, just as is true for spending within the farmers' market. The more often a customer shops, the more he or she is likely to spend. (See page 2 for more information on farmers' market spending patterns.)

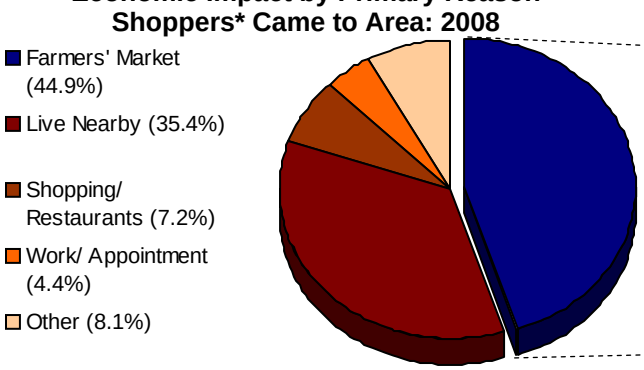
Average Spending in Local Shops and Restaurants by Primary Reason Shoppers* Came to Area of the Farmers' Market: 2008



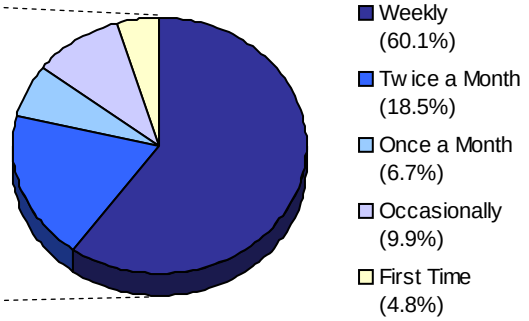
	Appointment	Business	Farmers' Market	General Shopping	Live Nearby	Restaurants	Work Nearby	Other
Pct. of Shoppers*	0.7%	1.8%	43.5%	7.0%	34.5%	1.1%	5.9%	5.4%

*Shoppers who reported any spending outside of the farmers' market – 61.7% of all shoppers surveyed.

Economic Impact by Primary Reason Shoppers* Came to Area: 2008



Economic Impact by Shopping Frequency of Shoppers* Coming for Farmers' Market: 2008



*Shoppers who reported any spending outside of the farmers' market – 61.7% of all shoppers surveyed.

Analysis of 4,611 customer surveys conducted by the Pacific Coast Farmers' Market Association in eight San Francisco Bay Area farmers' markets, 2007-2008.

Shoppers Buy Half of their Produce at Farmers' Markets

Farmers' market shoppers responding to PCFMA's surveys buy only about half – 46.7% – of their weekly fresh produce at the farmers' market where they completed the survey. Only 4.3% of shoppers buy 100% of their fresh produce at that farmers' market.

When asked why – shoppers could give more than one response – 30.1% prefer to shop several times a week, 21.8% lack storage space, and 21.0% want more variety than was available at the farmers' market.

Since California law states that only California-grown produce can be sold in a farmers' market, certain crops that are not commonly grown in the state – such as pineapples, mangoes and bananas — are not available in farmers' markets. Written comments from respondents – and anecdotal comments by survey staff – suggest that these items, especially bananas, were items commonly purchased by shoppers outside of the farmers' market.

Of those who prefer to shop several times a week, 30.4% shop at other farmers' markets in the area at least twice a month. Among those who lack storage space, 44.4% shop other farmers' markets as least twice a month. Thus, a significant percentage of Bay Area shoppers are purchasing more than half of their fresh produce at farmers' markets but those purchases are spread among multiple farmers' markets each week.

While a majority of shoppers, 52.3%, purchase everything they need there, 15.0% ran out of money and 14.8% couldn't carry more.

Those who purchase everything they need spend an average of $30.14 and buy 50.7% of their weekly produce at the farmers' market. Those who ran out of money spend an average of $26.24 and buy 42.9% of their weekly produce. Those who said additional purchases would be too much to carry spend an average of $32.70 on 45.2% of their weekly produce at that farmers' market.

The use of reusable bags in markets to reduce the use of plastic may have benefits for the market as well as the environment. Shoppers who bring their own bag spend more and buy more than those that do not, spending an average of $33.88 to buy 53.0% of their weekly produce versus shoppers without reusable bags spending an average of $26.21 for 39.7% of their produce.

But regardless of whether or not they bring their own bags, nearly equal numbers of each group stop shopping when it becomes too much to carry.

(Continued from page 1)

control sites, where no new advertising or marketing strategies were tested. In each farmers' market, advertising strategies that had been used in 2007 were repeated in 2008. For example, in the Brentwood Farmers' Market, print advertising was purchased in the Brentwood Press in 2008 as it had been in 2007, while electronic media advertising—the test strategy for that market—was added.

Collection of Follow-up Data

Follow-up data was collected through 2,541 customer intercept surveys in the same eight farmers' markets over 19 days exactly one year later in 2008.

Using adult crowd count estimates provided by the market managers for the eight survey days, the response rate in 2008 was estimated at 13.7%. The surveys were only available in English and Spanish, but Spanish response was low. Those without English proficiency likely had a higher refusal rate which may have contributed to the observed under-representation of some minority groups.

Those who were shopping together were allowed to complete separate surveys, though in many instances one member of the group would suggest that the other complete the survey. This too could have impacted the survey results as each response was analyzed as a separate shopping party.

The survey process and instrument used both years was virtually identical to allow pooling and comparison of data. It was composed of 18 to 21 questions concerning customer behavior, marketing and demographics. (Further information on the demographic comparison is on page 7.)

Distribution of Project Results

A publication summarizing the results of the baseline surveys was developed and distributed in January 2008. It is available online at www.pcfma.com/fmpp. This project final report was completed in January 2009, providing a summary of the data from the follow-up surveys with comparative data from the baseline surveys.

(Continued from page 3)

53.0% cited "requires little or no effort;" 41.9% cited "takes little or no planning" and 34.0% cited "easily cleaned up." (Data analysis by Campbell Soup Company, 2008. Source: NPD's Net*Plus* Database, 2006.)

These results on customer attitudes were drawn from four questions in PCFMA's farmers' market surveys that each required respondents to choose the more important of two criteria: locally-grown or organically-grown; freshness and quality or cost of the food; health and nutrition or convenience of the food and ease of preparation; and organically-grown or cost of the food.

These questions had among the highest refusal rates. Depending on the market, between 16.8% and 31.4% of shoppers refused to answer at least one of these questions. Survey staff commented that many shoppers felt both items were important and would not choose between them.

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Acknowledgements

The Board of Directors and staff of the Pacific Coast Farmers' Market Association wish to extend their sincere thanks to the **USDA Agricultural Marketing Service** for their generous support of this project, "Growing Customers at the Farmers' Market: Testing Marketing and Advertising Strategies for Increasing Customer Visits and Producer Sales."

It would not have been possible without the funding of the USDA through the Farmers' Market Promotion Program (FMPP) or the inspiration that the FMPP prompted. PCFMA is very proud to be among the first groups in the nation to receive a grant through the FMPP.

The Project Director was **Allen Moy**, PCFMA's Assistant Director. He designed the overall strategy for the project and was the principal author of the baseline study report as well as this report.

Stefan Robinson, PCFMA Promotions Coordinator, served as Project Assistant and oversaw the development of the advertising strategies that were employed.

Vance Corum of Farmers' Markets America, and the author of "The New Farmers' Market: Farm-Fresh Ideas for Producers, Managers & Communities," served as Project Consultant.

John Silveira, the Director of PCFMA, provided leadership for this project. He and many other PCFMA staff members contributed to the success of this project by approaching farmers' market customers to request they participate in the survey, and by inputting survey data. Special thanks go to **Debra Morris**, **Sarah Nelson**, **Max Timms, Denise Hardy, Bill Harlow, King Ly,** and **Malliaque Satterfield** for their efforts.

Special thanks, too, go to all managers of the farmers' markets included in the study for accommodating the survey team.

Finally, we wish to give the greatest thanks to the farmers and other producers that sell in every PCFMA farmers' market for their efforts to bring the world's best, freshest, and healthiest locally-grown products to market. We especially thank those who sell in the farmers' markets included in the survey. We hope any short-term disruptions that may have resulted from the presence of the survey team will be outweighed by the benefits as PCFMA, and other groups around the nation, use the data to continue building and improving farmers' markets.

About PCFMA

The Pacific Coast Farmers' Market Association (PCFMA) is a not-for-profit organization that operates and promotes farmers' markets in the San Francisco Bay Area. PCFMA was founded in 1988 and operated 55 certified farmers' market weekly during the peak months of 2008.

A certified farmers' market is an area certified by a county agricultural commissioner that allows the sale of agriculture products directly to the consumer by the farmer that grew the crop. Certified farmers' markets are the only place, other than the farm itself, where California law allows farmers to sell their products direct to consumers.

Farmers' markets are an essential part of California's agricultural economy, providing successful economic outlets for California's small farmers. For many small farmers they are their primary or only marketing outlets. Farmers' markets are also an integral part of the state and its food system, delivering farm-fresh fruits and vegetables while linking urban and rural communities face-to-face.

Our mission is to establish and operate community supported certified farmers' markets and other direct marketing outlets that provide: viable economic opportunities for California farmers and food producers, local access to farm fresh products, support for local businesses and community organizations, and education concerning food, nutrition and the sustainability of California agriculture.