

San Juan Farmers' Market

Rapid Market Assessment

July 10, 2004

Market Hours: Saturday, 10 a.m. – 1 p.m.
Location: Courthouse parking lot at Second Street, Friday Harbor, WA
Market Staff: Part-time paid manager
Opened: 1982
Fees: \$150 Membership & booth, or \$15 membership and \$10 per day
Vendors: 17, including farmers, bakers and prepared foods
Market Attendance: 824 estimated adults
Total Vendor Sales: \$8,046 estimated market sales
RMA Team:

Richard Civile, San Juan County Economic Development Council, Friday Harbor
Stephanie Cleveland, Councilwoman, City of Stanwood
Bob Corl, Old Mill Associates, Centralia
Mariah Cornwoman, Tonasket Farmers' Market
Vance Corum, Washington State University Small Farms Program, Vancouver
Brendan Crosser-McGay, Pasco Farmers' Market volunteer
Kate Halstead, Carnation Farmers' Market
Doc Hansen, PMSA/Progressive Land Planning & Puyallup Main St. F.M. Board
Sonie Hansen, Puyallup Main Street Farmers' Market
Richard Hines, Washington State University Small Farms Program, Puyallup
Candace Jagel, Bainbridge Island Farmers' Market
Karen Kinney, Neighborhood Farmers' Market Association, Seattle
Michael Laurie, Watershed, Vashon Island
Nicole Oliver, City of Bellingham
Tom Schultz, San Juan County Extension Director
Claudia Simpson-Jones, Old Mill Associates, Centralia
Chuck Smith, Tekoa Farmers' Market
Mary Smith, Tekoa Farmers' Market
Sally Straathof, Councilwoman, City of Burlington
Laney Sundberg, President, San Juan Farmers' Market
Fran Taber, Wenatchee Valley Farmers' Market
Lori Taylor, Bellevue Farmers' Market
Lacey Tutino, Coupeville Farmers' Market
Veronica Yzquierdo, Pasco Downtown Development Association

I. Total Attendance: 824 adults

Pre-opening shopper estimate	=	50
1 st Hour (10:00-11:00) estimate	=	372
2 nd Hour (11:00-12:00) estimate	=	186
3 rd Hour (12:00-1:00) estimate	=	216

Comment: More than 50% of customers came for the first hour of the market. This may reflect the fact that various items sold out early and vendors left. Early sell-outs tend to make customers come early to get what they want or not come at all because they have been disappointed.

II. Dot Survey Questions

Four dot survey sheets and two additional multiple-response sheets were begun when the market opened at 10:00 a.m. We did not change sheets half-way through the market, which might provide some insights into differences between early and late market customers. People were universally friendly and provided a very high intercept rate. The 361 customer respondents represent 88% of the estimated 412 shopping groups (824 divided by an estimated 2.0 people per shopping group).

Customers were given only four dots to answer four questions. The responses total 100% (sometimes over 100% because of rounding). We had team volunteers waiting next to two additional sheets so that they could intercept customers and ask them for multiple responses to two other questions.

Question 1: Where do you live?

N=361

San Juan Is. Full-time	48%
San Juan Is. Part-time	12%
Other San Juan Is.	1%
Puget Sound	16%
Elsewhere in Washington	5%
Outside Washington	18%

Sixty percent of customers are island residents.
A full 40% of customers are island visitors.

Comment: With 48% full-time residents and one-fourth as many part-time residents, the market has a good base of local support. However, the 40% who have come to the island as visitors clearly reflect the tourist culture of the island, a much higher response than any other market that has been studied. The market should be fully integrated into island marketing efforts. Future studies might address what this strong visitor population might find intriguing or helpful.

Question 2: Of these things, which would most improve our Farmers' Market?

N=362

Ready-to-eat food	30%
Mid-week market	20%
Crafts	19%
Longer season	18%
Entertainment	7%
Restrooms	6%

Comment: It is difficult to select only one thing on which to place a dot, but 30% most want ready-to-eat food. Virtually tied for second most important issue are a mid-week market (20%), crafts (19%) and a longer season (18%). Entertainment and restrooms still remain the principal issues for 7% and 6% of customers, respectively.

Question 3: Should the Farmers' Market have a permanent covered structure for a longer season and for inclement weather? N=337

Yes 66%
 No 9%
 Maybe 24%

Two-thirds of customers prefer a covered structure for the market.

Comment: Compared with shoppers asked a similar question in Port Angeles and Wenatchee, there is very strong support for a permanent covered market structure in Friday Harbor. While people are often resistant to change, that doesn't appear to be the case here. Certainly, more investigation would be appropriate before building, especially if moving to a new site without the same view. It would be wise to survey non-customers to see if a building or some form of sun, wind and rain protection would encourage them to shop at the market. The Olympia Farmers' Market has demonstrated the strong growth potential of a market building with the appropriate mix of products and vendor, providing a landmark feature for that community.

Question 4: How much will you spend at the Farmers' Market today? N=330

\$0 8%
 \$5 12%
 \$10 15%
 \$15 13%
 \$20 18%
 \$25 13%
 \$30 10%
 \$40 8%
 \$60 2%
 \$80 0%
 \$100 1%
 \$150+ 0%

Almost 2-in-3 customers spend \$20 or less.

Comment: The average customer expenditure is \$19.53. Almost two-thirds, 65.5%, spent \$20 or less at the market. This may suggest that a larger variety of products and more ready-to-eat foods would complement their market tour, allowing them to enjoy some local foods and the fantastic view simultaneously. Only 11.5% spent \$40 or more, also suggesting a limited variety compared to some other farmers' markets.

Question 5: What types of music would you like? N=300 est.

Folk/instrumental	124	%
Jazz/blues	83	%
Classical	58	%
Latin/salsa	45	%
Buskers	38	%

Country	33	%
Rock	22	%
None	14	%

Added gradually by customers:

Larger variety	15
Just Mike!	12
No preference	15
Gospel	4
Big band 50s	4
Bluegrass	7
Marimba	8
Reggae	3
Middle Eastern	4
Greek dancing	2
Teasers from theatre	
Draw from local musicians	
Total responses	493

Question 6: What products would you most like to buy here?

N=300 est.

Blueberries & other	115	%
Goat cheese	110	%
Eastern WA fruit	90	%
Island crafts	82	%
Eggs	79	%
Larger produce selec.	68	%
Cow cheese	36	%
Chicken	33	%
Milk & yogurt	21	%
Washington crafts	18	%

Added gradually by customers:

Flowers/plants	45
Honey	24
Baked goods	47
Fish/poultry	37
Pork/lamb	20
Coffee	30
Ready-to-eat food	37
Market recipe book	8
Market calendar	9
Beef	6
Total responses	915

III. Constructive Comments/Observations

The purpose of this section of the report is NOT to provide an overall guide to the market or to rank it against any other. Rather, it allows for feedback from a fresh “outsider” perspective. The team noted elements they liked, what they thought might use improvement and any questions they had. Views of various team members may vary. The RMA process is rooted in sharing; both the observed and the observers should gain new insights and ideas.

Physical Site

What team members appreciated about the physical site:

- I like the level, open, sunny site with beautiful view. Take advantage of it – make it a destination.
- Very busy at 10:00 – 10:45 a.m. Impressive!
- This site is great – The view is so wonderful, enhancing the experience, I’d be inclined to stay right here and invest in cover for all rather than move to Spring Street!
- Other site could be wonderful but there are trade-offs.
- A parking lot can be charming! Good access, adequate parking, tables in walkway a good idea.
- Flow of people seemed smooth, walkway wide enough, parking turnover adequate.
- Easy access and sufficient parking; one central aisle ensures that people look at most everything.
- Orderly load/unload not impeded by pedestrian traffic.
- Liked the info kiosk and presence of Master Gardener.
- Parking is phenomenal! Cones seem adequate to keep out cars.
- The site seems adequate for the current market with good parking and room for expansion.
- Wish we had that view!
- Make the most of what you have – enhance and wait for better site or bloom where planted.

Physical Site – Improvements and Questions:

- South entrance strong but north weak – could you move one producer down there since lots of foot traffic enters there.
- Shoppers, tourists and vendors all would enjoy lunch with that fabulous view. Work it! Set up tables with colorful, vinyl tablecloths and seating. Create the lunch crowd.
- Present inability of farmers’ market organization to collaborate with others and represent itself as an effective business interest.
- Good organization. Do you hand out flyers to the boaters mooring below on Friday? What about Roche Harbor – could boaters take a taxi to market? I think you could draw more people.
- Signage from the marina is not there. Do you want to attract boaters?
- With a more visible location, a much higher portion of shoppers would be island visitors.
- Hard to find – can’t see market from the street.
- Farmer vehicles block market visibility from street.
- If you get a covered site, try to keep an open view; the island atmosphere is great for visitors.
- Parking seemed adequate, though location at edge of lot is not ideal.
- Take better precautions to block vehicular access directly into market pedestrian area.
- More downtown signage would be extremely helpful to off-islanders – didn’t see signs/arrows.
- Suggest six signs around town for cheap, effective marketing.
- Merchants were supportive and would display farmers’ market posters.
- Create a lot more off-site visibility with posters, flyers, A-board with arrows, banners, etc.

- ❑ Don't let it look like it's anything but planned, i.e. fill empty stalls with tables, info signs, etc.
- ❑ The central aisle is too wide, leaving a feeling of emptiness during most market hours.
- ❑ What about reorienting the market for greater street visibility – either shift over toward the street or turn 90 degrees to make the aisle face the water.
- ❑ Get a better “No Dogs” sign.
- ❑ Need much larger, readable sign on the gazebo that the public can read when market is closed.
- ❑ One customer couldn't find manager. Wear something that stands out.
- ❑ Manager and committee members should be identifiable.
- ❑ Unsecured umbrellas/canopies could be a liability. WSFMA requires weights at all markets.
- ❑ Educational signage – map with farm locations and statement of direct benefits for small farms.
- ❑ You might need an obvious garbage can or two. Vendors' cans are small and hard to see.
- ❑ Adapt vendor selection to community needs and improve layout, especially recessed tables.
- ❑ Develop a cross-promotional campaign (posters, coupons, flyers) with downtown businesses.
- ❑ Is market in city and business brochures? Need trifold/rack card for hotels and ferry
- ❑ Would the city allow banners on light poles or A-frame signs? Code change necessary?

Market Atmosphere

What team members appreciated about the market atmosphere:

- This is a fun market! Every vendor I talked with was friendly, helpful, welcoming and willing to share. The music added to the mood. The feeling that here was a community coming together in a relaxed, human atmosphere was palpable!
- This market has wonderful feel...island living, simple and good. I love the fact there are no crafts.
- Fabulous market! Conversations and interactions galore.
- Definitely a community event.
- Wonderful community market – very fitting for the island. Well done, Jane!
- Love the color and flair of your market. Everyone seems to be having a good time.
- Customers seem loyal – great community feel. Depending on mission/strategy, educate public on importance of welcoming farms, not just local ones.
- Love the water view, but the space feels confining.
- The water view makes the asphalt lot and lack of amenities fade into the background.
- Site has nice spacious view.
- People visiting with friends.
- The atmosphere is created by the people and the products they sell – building or open air.
- Wonderful, friendly atmosphere. People like it and want to support it heavily.
- Main aisle is perfect promenade – very conducive to encouraging contacts and interactions.
- Mix of shoppers (local vs. tourist) seems very good.
- Neighbors bumping into neighbors. A lot of tourists, of course, in the San Juans.
- Good spirits, good presentation, good place to meet and mix. Booths generally well presented, lots of baskets, umbrellas, checkered tablecloths. Flowers provide lots of color.
- Good energy, music at good volume (acoustic, moves through market), smiles, inviting.
- Strolling accordionist lovely. Flowers were divine. Vendors were enthusiastic and shared openly.
- Wandering minstrels (unamplified) are very effective in creating ambiance.
- Booths are generally well presented – baskets, umbrellas, checkered tablecloths, flower color.
- Shoppers seem to know what they've come for.

Atmosphere – Improvements and Questions:

- ❑ I don't feel I want to stay. I want to shop and get out. The potential for ambiance – a more diverse product mix including island crafts, music, cooked and ready-to-eat foods – would make me linger and buy more.
- ❑ More vendors? Availability?
- ❑ Quiet and inviting but a bit dull atmosphere.
- ❑ Could use more music.
- ❑ I'd feature some entertainment or cooking display in the gazebo every week!
- ❑ More entertainment might attract and hold more customers.
- ❑ New activities are useful – people were even interested in the dot process.
- ❑ Could involve restaurants – offer tastes.
- ❑ Customers seem to shop and leave – don't linger very long.
- ❑ Some customers had a die-hard “locals only” stance – might be opposed to “outside” vendors.
- ❑ Encourage neighboring farms – need more vendors.
- ❑ Need something for kids to do – theatre could bring kids' activity outside, mask making or other art event, dance workshop for students to perform.
- ❑ Educational activities: 4-H kids with animals, explaining their projects, or anyone with heirloom varieties who could put together a display?
- ❑ Not enough color – could use more flags and banners
- ❑ More colorful umbrellas – umbrella decorating contest?
- ❑ Put a standing tent sign in the middle of the street pointing to the farmers' market.
- ❑ Try A-boards with “Welcome” and “Thanks for supporting our local farmers” on either side.
- ❑ Can you open the market a little earlier to serve locals who work at 10 a.m.?
- ❑ Need stronger presence of non-profits gaining visibility and income for their causes.
- ❑ Chicken or the egg – invest in music, demos, education, & events, and the people will come!
- ❑ With all the tourists, this market should have a chamber rack with activities for all.
- ❑ Don't allow political party access; folks may think market supports Green Party.
- ❑ More ready-to-eat food would encourage people to linger and give it a busier feeling.
- ❑ People do not have their own bags – not many intentional shoppers; need a bag campaign.
- ❑ Develop a coordinated campaign around an event with many more products and customers.

Vendors and Products

What team members appreciated about the vendors and products:

- I wish we had local farmers like these available.
- Great product mix and excellent customer service.
- Vendors all friendly, great quality, nice selection, generally good signage.
- Vendors were all helpful and appeared happy.
- Be happy – go with the flow – mingle.
- Displays were by and large quite lovely – good sense of presentation.
- Vendors engage customers, varied signage so each stands out, nice stand spacing.
- Checkered tablecloths, baskets & umbrellas provide sense of continuity w/o uniformity.
- Flowers were amazing. Herbal-based food products –yum! Also, frozen meat and wine great.
- Wonderful lavender lime drink.
- Good honey – clean product and label – no fru fru, no gimmicks.
- Use of recycled paper grocery bags good!

- Vendor presentation is significant. Nootka Rose Farm has fantastic presentation!
- Nootka Rose waited for the bell, had line and created urgent desire to buy.
- Nice mix for so few vendors – produce, flowers, wine, bread, etc.
- Humble cucumber sandwiches on good bread can be delicious.

Vendors – Improvements and Questions:

- ❑ Early sell-outs need more product. Vacant spots not good. Can they bake more bagettes?
- ❑ Several vendors left early – that gives customer little incentive to shop full market hours.
- ❑ Some vendors were late, after customers were there – even if they stayed to show curiosity.
- ❑ Could use eastern Washington fruit and produce to round out market offering.
- ❑ What about fish, shellfish, cheese, eggs, more ready-to-eat to meet lunchtime needs.
- ❑ There is consumer demand for island crafts.
- ❑ Set up craft jury to allow expanded crafts.
- ❑ Seems heavy on flowers, but good mix of farm products overall.
- ❑ Too many flowers, no drinks or snacks to buy.
- ❑ Could use more pastries.
- ❑ More vendors would give feeling of abundance.
- ❑ Some vendors just sit back and wait.
- ❑ Farm/business name and price were sometimes not immediately determinable.
- ❑ I'd like larger signs with clearer lettering.
- ❑ Signs on all stands are too small to read from a distance; need more visibility, even if pictures.
- ❑ Some vendors could use tips for improving displays. Help create illusion of abundance; need to fill the table even if you only sell two jars of honey.
- ❑ Most popular vendors might get help for first hour to avoid losing customers.
- ❑ Something to keep people for longer? Quick in & out shows familiarity and few new vendors.
- ❑ Do you want tourism in your market? Have downtown businesses work with you.
- ❑ Unclear why you can have wool rugs but no other wool products/spinners allowed.
- ❑ The dahlia tuber display looked out of place – no color.
- ❑ My feeling is the Jackson/Perkins roses are a negative. Quality not great.
- ❑ Port vendor and some others' prices not visible.
- ❑ Ensure that basic health standards are consistently followed for public safety.
- ❑ Definitely need more edible food on site – espresso, tamales, chili, crabcakes, etc.
- ❑ Need more volume and competition – much larger crowd will follow.
- ❑ Truly successful markets have vendors take some product home; it's the key way to guarantee customer needs are met.

IV. Retailer Comments

Based on the strength of our RMA team, we sent three teams of two people each to conduct short interviews with retailers on Spring and First streets. They asked three questions to initiate short conversations about whether there was retailer support for the farmers' market.

There was almost universal enthusiasm and support for the market. When asked how they feel about the market, they responded with “great,” “positive,” “nice,” “like,” “enjoy” or “support it.” When asked if the farmers' market had any impact on their business, most felt it did not, although several saw a positive connection. Very few actually shop the market because of the limited hours. The market

needs to demonstrate its strong relationship to the tourist trade to rightfully claim its positive role as one of the enjoyable activities that reinforce the island visitor's experience.

Asked about improvements that the market might make, businesses felt that a more visible site – like Brown Lumber – would allow tourists to find it more easily and reinforce visitors walking farther up Spring Street, complementing other downtown activities. Some wondered if it would be too far from the ferry, past the walking path that many visitors take. Most felt that being two blocks from the core business district is a liability and that many more people would enjoy it were the market more readily accessible. This then would give local businesses a reason to be more active in their support.

There now exists a missed opportunity for a mutually beneficial linkage between the farmers' market and the rest of the business community. It should not be overlooked any longer. Knowing that 40% of market customers are island visitors gives strong motivation to cultivating an improved connection between tourism and the market. The downtown business community shows true appreciation for the market, yet is unaware of how many visitors also enjoy it.

If the market moves to a Spring Street site, it should use the change to educate businesses and others to the potential for additional business as the market draws people through town. Market management might get more involved with the chamber of commerce. Conversely, the market needs business help in developing a strong promotional campaign to make that a site change successful.

Common comments included the need for a larger selection, competition and consistent supply throughout market day to draw customers. Businesses also wanted earlier and longer hours (not realizing the strain on Waldron growers), an extended season and more self-promotion, including ferry brochures. Some business owners would serve on the market board if asked. Many businesses would take advantage of an opportunity to support the market if a clear, exciting, promotional program were conceived, perhaps with a poster and postcards.

Additional comments revolved around the desire for more crafts, parking concerns, missing the cheese and moving to the more visible side of the current parking lot. Finally, most were concerned about the new fruit stand's impact on the farmers' market, although one friend of the owner was concerned about the farmers' market impact on the stand.

The businesses contacted included the Whale Museum, Neil's Images, Toy Box, Hard Clay Café, Crossing Bookstore, import store, Softwear, Elephant Crossing, Bookstore owner, Dan Lavin (jeweler), The Toggery, Sam's Radio, Front Street Ale House, Maloula's, Amigo's, San Juan Inn, Friday Harbor Realty, King's Marine, Friday Harbor Drug, Not Just Desserts, San Juan Jewels, Island Studios, Duke's, Robin's Nest, Democratic Café, All Seasons Automotive and Friday Harbor Inn.

V. Social Interactions

Also, due to our strong team, several people shadowed customers from the time that they entered the farmers' market until the time they departed. They stayed at a discreet distance from the customer, attempting to keep the customer unaware of their presence. They noted the number of social interactions, their time spent at the market and the amount of money spent.

Customers seem to spend less time at the market than at other markets, perhaps because of its size. Of at least eight customers followed, only two stayed longer than 10 minutes. They had from three to 23 social interactions at the market. One woman spent 47 minutes at the market without buying anything, but hugged 17 people and spoke to 23 people who did buy a lot and seemed glad to be at the market. Later she returned to make several purchases.

Future dot research might investigate how long people stay at the market and how much they spend in local businesses. This could be researched at the current site and compared over time, especially if the market should move to a new location. Much of this research might be conducted in conjunction with the visitors' bureau since the farmers' market is a part of many visitors' experiences.