

ND Department of Agriculture State Wide Farmers Market Rapid Market Assessment (RMA) Study June-September 2008

Project Purpose

The ND Dept of Agriculture (NDDA) and the ND Farmers Market and Growers Association (NDFMGA) launched a state-wide survey of North Dakota farmers markets to be completed in June – September of 2008. The purpose of this survey was to observe what is happening with our farmers markets, examine how they are impacting our state and our communities, and gather data on the markets and customers in general.

Due to the initial breadth of information sought in this first-ever farmers market survey, there were many variables factored throughout the duration of the surveys. These factors affected the accuracy of the survey and included weather, holidays, customer counts, and an overarching difference in how each surveyor approached and completed the project.

Because of these variables, the study conducted was not scientific in nature, nor do we purport the data to be faultless; however we were able to gather critical information and make close observations of 33 of the state’s farmers markets.

Surveying customers at better than 60 percent of the total markets across North Dakota gave us a good look at what the market landscape is like, how to better approach a survey in 2010, and what the immediate needs of ND markets are and the ND Dept of Agriculture can do to best serve those needs.

Survey Method – Rapid Market Assessments

The Rapid Market Assessment Approach (RMA) was used to conduct the surveys. This method is explained in detail in *Tools for Rapid Market Assessments* by Larry Lev, Linda Brewer and Garry Stephenson of Oregon State University.

<http://smallfarms.oregonstate.edu/sites/default/files/publications/techreports/TechReport6.pdf>

The authors of this method state that ‘Most farmers’ markets lack the information required to make effective changes and improvements. We have designed three simple, low-cost methods to address these information needs. The first two, attendance counts and dot surveys, are quantitative methods that can be used independently by individual markets.’ By using this survey method we hope to see independent markets around the state make use of its simplicity so they too can ask questions specific to their market in order to better serve their communities. We hope that this publication of the results of the state-wide survey will also help ND farmers markets become better and stronger in the 2010 market season.

We chose to use the “dot survey” method for the following reasons outlined by the authors in *Tools for Rapid Market Assessments*:

“Conducting consumer research in farmers’ markets presents significant challenges. Traditional survey techniques, such as interviews and written questionnaires,

are not well suited to this venue. Small sample size and bias introduced by the non-representativeness of those agreeing to be interviewed reduce the accuracy of face-to-face interviews. Written questionnaires, whether to be completed in the market or returned by mail, have very poor response rates, once again biasing the sample.

“The Dot Survey approach significantly increases both the number of consumers surveyed and the percentage who agree to participate. Consequently, this approach provides more accurate assessments of consumer preference and behavior.

“The Dot Survey technique is “self-service” research approach that asks a limited number of questions displayed on easels in the market. We call the individual questions “Dot Posters” because consumers indicate their responses using colorful, round, self-stick labels or “dots”.

“This survey technique differs from other approaches in that respondents can see how others have responded. This is both a strength and a weakness. It is a strength because respondents view the process as much less extractive – they appreciate inclusion in the research process. It is a weakness because respondents may be influenced by what they observe on the posters. This is not a concern for the majority of questions.”

NDDA worked with ND State University Extension County Agents across the state to conduct the surveys at the identified markets. We also utilized NDDA staff and NDFMGA board members to help with the project. Each surveyor received a packet in the mail that included all the necessary supplies and instructions on how to best to conduct the survey. For detailed lists of supplies and instructions provided, please see Appendix A.

Each surveyor was given a brief summary from the document *Tools for Rapid Market Assessments* to provide them insight on why we chose this method to gather our information and how it is intended to help us learn more about the farmers markets in North Dakota and the customers that shop the markets. This document can also be found in Appendix A.

The market manager of each market scheduled to be surveyed was contacted and informed of the upcoming survey and notified of the person who would be conducting the survey at their specific market. The market managers were also asked to find a person in the community willing to help count market shoppers the same day the surveyor did the survey. Instructions given to counters can be found in Appendix A.

Ultimately the count became one of the variables because market managers did not always have someone on hand to do the counting and many markets did not follow the instructions on how often to conduct the count during market hours.

Results

In 2008 there were approximately 48 farmers markets operating across the state. The North Dakota farmers market season averages 15 weeks of operation in the months of June-September. The survey was conducted at 30 of the 48 farmers markets in North

Dakota. Three of those markets were surveyed twice for a total of 33 surveys conducted between June 2008 and September 2008.

Discrepancies between survey results and charts exist due to the different methods some surveyors employed in conducting the survey. For example Emmons County Linton Farmers Market does not have results for the amount of money spent by the customers because the surveyor did not ask this question during the survey.

The original Project Proposal presented to USDA stated four Expected Measurable Outcomes for this project. We believe that the surveys we conducted across North Dakota accomplished all four of those outcomes.

Expected Measurable Outcomes

1. Collection of tangible and reliable data about farmers markets in North Dakota including information from area merchants, local residents, regular shoppers, as well as new comers to the markets from which future plans and goals can be developed and can be used to secure future funding for local food endeavors.
2. Provide a look at how the farmers markets are operating and learn the needs and challenges they face that need to be addressed.
3. Assessing the efficacy so NDDA can assess and improve internal operations and communicate the impact of farmers markets and keeping food dollars local to the citizens of North Dakota.
4. Provide time for on-site interaction with each formally organized farmers market in North Dakota and their managers and vendors. Creating real-time connections with North Dakota consumers of farmers market products and allowing us to engage with them and learn more about their consumption demands.

ND farmers markets that were surveyed are listed here in alphabetical order:

1. Bottineau Farmers Market
2. Cando Farmers Market
3. Capital Farmers Market – Bismarck (surveyed twice)
4. Cooperstown Farmers Market
5. Crosby Farmers Market
6. Downtown Festival Farmers Market – Fargo
7. Ellendale Farmers Market
8. Emmons County Farmers Market - Linton
9. Farmers Market & Beyond – West Fargo
10. Harvey Farmers Market
11. Jamestown Farmers Market (surveyed twice)
12. LaMoure Farmers Market
13. Langdon Farmers Market
14. Mandan Farmers Market (surveyed twice)
15. Minot Farmers Market
16. Napoleon Farmers Market

17. North Prairie Farmers Market – Carpio
18. North Prairie Farmers Market – Granville
19. North Prairie Farmers Market – Minot
20. North Prairie Farmers Market – Velva
21. Pembina Farmers Market
22. Ray Farmers Market
23. Roughrider Homegrowers Farmers Market - Dickinson
24. Rugby Farmers Market
25. Sakakawea Farmers Market - Beulah
26. Town Square Farmers Market – Grand Forks
27. Urban Harvest - Bismarck
28. Valley City Farmers Market
29. Walhalla Chamber of Commerce Farmers Market - Walhalla
30. Western Cooperative Credit Union – Williston Farmers Market

The following five (5) questions were asked at each of the thirty-three (33) ND farmers markets that were surveyed:

1) How often do you visit the market?

- First Time
- Weekly
- Monthly
- Rarely

2) How much have you/will you spend in the market today?

- \$0
- \$5
- \$10
- \$15
- \$20
- \$25
- More \$\$

3) Was the farmers market your primary reason for coming downtown today?

- Yes
- No

4) How would you like to improve this market?

- More growers
- Better location/parking
- Different hours
- More organic produce
- More prepared foods
- More meat & cheese
- More crafts

5) **What is your zip code?** (*participants were asked to write in their zip codes*)

Compiling all of the results from each market surveyed the following statements can be made about farmers markets and those who shop at farmers markets in North Dakota.

The average farmers market in ND operates 1.5 days per week for 3.3 hours each market day.

- **The total average daily sales is \$59,758.00**
- **The total average annual sales is \$1,500,536.00**
- **The average daily sales at a ND farmers market is \$1,928**
- **The average annual sales at a ND farmers market is \$48,404**

The following conclusions can be drawn from the 33 surveys conducted across the state:

- 84% of the markets have shoppers who return to the market on a weekly basis to shop.
- ND farmers market shoppers reported the following on their spending at the markets:
 - 60% spent at least \$10 in the market that day
 - 18% spent at least \$5 in the market that day
 - 15% spent at least \$20 in the market that day
- 78% of ND farmers market shoppers stated that coming to the market was their primary reason for coming into town/downtown that day.
- 90% of ND farmers market shoppers listed their number one recommendation for the markets as having more growers at the farmers market.

The total number of shoppers counted in the course of all the surveys performed was 5,132 persons who shopped at 30 markets in North Dakota. (This is counting adults only and households [2 or more shopping together, such as husband/wife were counted as 1].)

The results from each market survey have been recorded into charts and graphs included in the following pages of this summary.

Also included is a listing of all ND cities and their zip codes which will help market managers identify where their customers are from.

Discussion

While this survey was not scientific in nature we have been able to use the data we gathered from across the state to learn about ND farmers markets. It is the intent that each market will take the results from their respective survey and use the information to implement new strategies and changes in the 2010 market season.

Overall customers are very satisfied with the farmers markets; however there is room to grow! By stating that they would like larger selection, markets should be actively seeking more vendors to participate in the farmers markets.

Acknowledgements

We would like to extend our appreciation to all of the NDSU Extension County Agents, NDFMGA board members, market managers and others who helped us complete this initial round of surveys and information gathering.

We hope that by using our findings and continuing our efforts of working together we can further promote farmers markets and local foods in the state of North Dakota.

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