

Roslyn Sunday Market
Rapid Market Assessment
August 10, 2008



Sunday, 10:00 – 2:00
Pennsylvania & First (Hwy. 903)

RMA Team

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Prepared for: Roslyn Sunday Market
By: Farmers' Markets America

Overview

Market Staff:	S Corporation owner Jonine Collins, and part-time market manager
Market Opened:	2005
Fees:	\$20 for hot foods and crafts, free for farmers (2008 only)
Vendors:	21 vendors (7 farmers, 2 processed and hot food, 11 crafts) plus 2 nonprofits
Market Sales:	\$4,833 vendor reported sales (\$230 avg.; \$300 farmer avg.)
Sales by Category:	Of total vendors, 33% are farmers with 43% of sales, 10% are processed/hot food with 18% of sales, and 52% are crafts with 34% of sales. The market pantry has another 5% of market sales.
Market Attendance:	1200 estimated adults

I. Total Attendance: 1200 adults

We divided our total adult count of 1204 by an estimated 2.0 adults per shopping group to arrive at a figure of 602 shopping groups.

MARKET ENTRANCE COUNTS						
(by number and percentage each hour)						
	<u>1st</u>		<u>Backside</u>		<u>TOTAL</u>	
	<u>Street</u>		<u>(alleys)</u>			
	<u>No.</u>	<u>Perc.</u>	<u>No.</u>	<u>Perc.</u>	<u>No.</u>	<u>Perc.</u>
1st Hour (10:00-11:00)	294	36%	66	19%	360	30%
2nd Hour (11:00-12:00)	258	31%	138	39%	396	34%
3rd Hour (12:00-1:00)	132	16%	144	41%	276	23%
4th Hour (1:00-2:00)	144	17%	6	2%	150	13%
	828	70%	354	30%	1182	100%

The pre-count was 22; that is the number of adult shoppers in the market prior to opening. Including the pre-count, the first half of the market had two-thirds (66%) of shoppers. The market shopper count dropped off by one-third during the third hour, Noon to one o'clock, and by another third during the final hour, not uncommon for many markets.

The customer counts indicated that 70% of customers enter from First Avenue, not surprising given the traffic along Hwy. 903 into downtown Roslyn. Yet 30% still enter from the backside of the market where they find parking (or happen to live). A number of people came by bicycle or motorcycle.

[Note: Percentages may not be exact due to rounding to the nearest whole number.]

II. Dot Survey Questions

Four dot survey question sheets were set up on tripods in the middle of the market along Pennsylvania Avenue from 10:00 a.m. to 2:00 p.m. We intercepted 270 customers who each represented a different shopping group. Given the estimate of 602 shopping groups, there was a 45% intercept rate of all

customers. This is a very good rate, but not surprising given the nature of a rural community and a more leisurely Sunday market.

Market shoppers were asked to tell us whether they were area residents (under 5 miles, 5-20 miles or more than 20 miles to their home), part-time residents (same breakouts) or visitors to the area. They were given four dots in one of seven colors so that their responses would be coded. All responses were tabulated according to where the respondent was from, so the charts below reflect the different customer groups. Care should be taken in making assumptions based on small numbers of responses for any given group; however, the aggregate totals are more dependable.

Totaling the first three columns below, we find that 41% of respondents are full-time area residents (one-third live in the immediate vicinity). Totaling the next three columns, 16% are part-time area residents. Knowing that visitors may feel less compelled to participate in a community research project, we can assume that total visitor attendance is likely to be higher than the 43% response by visitors below.

Question 1: How did you find out about this farmers' market?

	PROMOTION EFFECTIVENESS														Full Market	
	Res < 5		Res 5-20		Res 20+		PT < 5		PT 5-20		PT 20+		Visitor			
	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.
Saw it & stopped	34	37%	4	31%	2	29%	6	40%	4	36%	8	44%	57	49%	115	42%
Word-of-mouth	44	48%	5	38%	3	43%	7	47%	4	36%	6	33%	37	32%	106	39%
Newspaper ad	5	5%	3	23%	2	29%	1	7%	1	9%	3	17%	8	7%	23	8%
Sandwich board	2	2%	1	8%	0	0%	0	0%	1	9%	0	0%	6	5%	10	4%
I-90 banner	3	3%	0	0%	0	0%	0	0%	1	9%	0	0%	2	2%	6	2%
Link to website	2	2%	0	0%	0	0%	0	0%	0	0%	1	6%	3	3%	6	2%
Rack card	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	2	2%	3	1%
Website	0	0%	0	0%	0	0%	1	7%	0	0%	0	0%	1	1%	2	1%
Business card	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
TOTAL	91	34%	13	5%	7	3%	15	6%	11	4%	18	7%	116	43%	271	100%

Half the visitors (49%) say they learned about the market simply by driving by, but a strong 37% of full-time and part-time residents found it the same way, for a total of 42% overall. Word-of-mouth is nearly as common (39%), especially for full-time and part-time residents within 5 miles. Low raw numbers do not allow us to be conclusive but newspaper ads may be somewhat effective for residents more than 5 miles away.

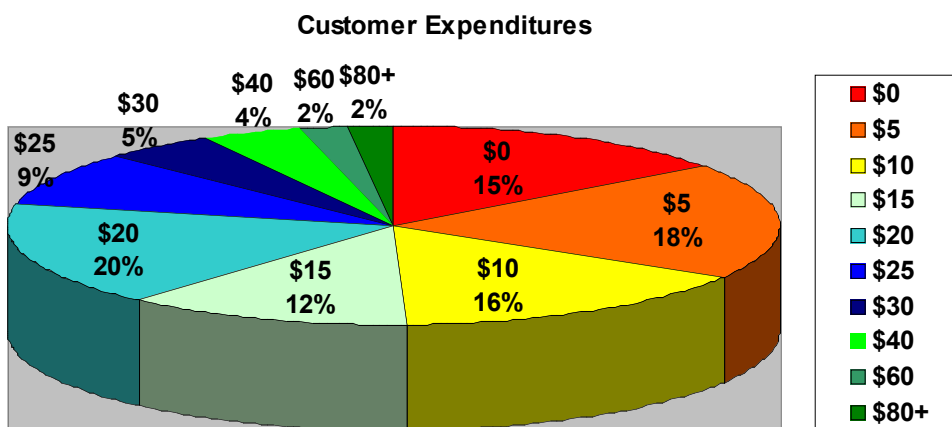
The responses for many promotional measures are lower than in similar research at other markets, probably reflecting the visitor influence; without them, the percentages would nearly double. It is worth remembering that all respondents put just one dot on a column, so a sandwich board, banner or rack card may have influenced them yet they ultimately said that the sight of the market or word-of-mouth moved them.

Banners and sandwich boards serve both informational and directional purposes. Most consumers act in response to more than one stimulus (the basis for numerous types of publicity to create top-of-mind awareness) and the market's physical attractiveness to passersby is critical in pushing them to stop and visit.

Question 2: How much did you (or will you) spend in the Farmers Market today?

CUSTOMER EXPENDITURES		
Full Market		
	<u>No.</u>	<u>Perc.</u>
\$0	40	15%
\$5	51	19%
\$10	43	16%
\$15	31	12%
\$20	44	17%
\$25	24	9%
\$30	13	5%
\$40	11	4%
\$60	4	2%
\$80+	5	2%
	266	100%

Average customer reported spending was \$16.05 at the Roslyn Sunday Market. Full-time area residents reported spending \$17.08, part-time residents spend \$17.95 and visitors spend \$14.22. Re-arranged in pie form, these figures shed light on the trends:



Those reporting spending of \$20 or less were 77% of very local residents (under 5 miles), 69% of part-time very local residents, and 83% of visitors.

The pie chart dramatically reflects that only one-in-five shoppers (21%) spend more than \$20 (top left corner) and only 8% spend \$40 or more. Growth can most easily occur by increasing expenditures by existing customers, perhaps with the development of a “Buy Local” education campaign. Vendors fronting First Avenue could improve their full, colorful displays to reinforce people who respond to the promotional tools or attract tourists. More research could focus on desirable products for shoppers, including prepared foods.

Major statistical note: Using the estimate of 602 shopping groups (total count of 1,204 divided by an average of 2.0 adults per group), and multiplying by \$16.05 average expenditure, we would estimate \$9,662 in sales. This derived figure is grossly above – double – the \$4833 sales reported by vendors that day. The most likely explanation for this discrepancy is a combination of customer overcount, substantial numbers of non-spending visitors who did not respond to the questions (thus the 15% non-spenders would be substantially higher), customer over-reporting of purchases, and vendor under-reporting.

Alternately, if we assume the \$4833 reported sales to be correct, dividing by 602 shoppers, we would have to conclude that average sales are \$8.03 per customer, rather than the \$16.05 average that customers reported. This is not out of line with the Tacoma customer average, influenced by substantial numbers of business people and transient visitors.

Question 3: What was your primary (#1) reason for coming to town today?

REASON IN TOWN																
	Res < 5		Res 5-20		Res 20+		PT < 5		PT 5-20		PT 20+		Visitor		Full Market	
	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.
Sunday Market	63	68%	7	44%	6	75%	6	38%	6	60%	9	43%	21	19%	118	43%
Tourist	1	1%	1	6%	0	0%	2	13%	0	0%	6	29%	56	50%	66	24%
General shopping	12	13%	2	13%	1	13%	1	6%	1	10%	3	14%	3	3%	23	8%
Eating out	1	1%	0	0%	0	0%	2	13%	1	10%	1	5%	9	8%	14	5%
Work	3	3%	1	6%	0	0%	1	6%	0	0%	1	5%	0	0%	6	2%
Church	2	2%	3	19%	0	0%	1	6%	0	0%	0	0%	0	0%	6	2%
Other	10	11%	2	13%	1	13%	3	19%	2	20%	1	5%	22	20%	41	15%
TOTAL	92	34%	16	6%	8	3%	16	6%	10	4%	21	8%	111	41%	274	100%

Sunday Market is the reason 43% of people are in town; it is the motivator for 66% of full-time residents, 45% of part-time residents and only 19% of visitors. One-quarter of all shoppers (24%) say their primary motivation is being a tourist; this figure is created by the visitors (50%) and part-time distant residents over 20 miles (29%), but not all other residents (2%). Residents are more likely to come to town for general shopping (13%), similar to the case for part-time residents (11%), but not for visitors (3%).



Overall, while the Roslyn Sunday Market is an attractive motivator for some visitors, it is the key reason for the majority of residents to come to town. Other businesses would do well to link with the Market for promotional purposes as many music stage sponsors have done. The Market complements and reinforces the trips of those coming to Roslyn for tourist, general shopping, restaurant or other reasons.

Question 4: What stopped you from buying more at the farmers' market today?

REASON FOR NOT BUYING MORE																
	Res < 5		Res 5-20		Res 20+		PT < 5		PT 5-20		PT 20+		Visitor		Full Market	
	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.
Ran out of cash	22	25%	1	8%	3	33%	3	23%	2	20%	5	25%	17	16%	53	21%
Prices too high	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Couldn't carry more	5	6%	1	8%	0	0%	3	23%	0	0%	1	5%	6	6%	16	6%
Lack of variety	3	3%	1	8%	0	0%	1	8%	1	10%	0	0%	3	3%	9	3%
Ran out of time	2	2%	0	0%	3	33%	1	8%	1	10%	0	0%	13	13%	20	8%
Distant parking	0	0%	1	8%	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Poor quality	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Didn't come to shop	11	12%	4	31%	0	0%	3	23%	2	20%	5	25%	37	36%	62	24%
I got what I wanted	46	52%	5	38%	3	33%	2	15%	4	40%	9	45%	28	27%	97	38%
TOTAL	89	34%	13	5%	9	3%	13	5%	10	4%	20	8%	104	40%	258	100%

More than one-third (38%) of all respondents were satisfied and had no reason for not buying more. Another 24% didn't come to shop. Together, they represent 62% of shoppers. Notably, no one felt that prices were too high, and parking and quality were non-issues.

Analyzing the remaining reasons, we find that cash, time, heavy loads and lack of variety explain why these people didn't buy more. Looking at these 38% of respondents, lack of cash impacted 52% of them (or 21% of total respondents) – they may need to be directed with signage to a handy ATM or, better yet, have one on site. Another 20% (8% of total) ran out of time, about which not much can be done. One-sixth or 16% (6% of total) couldn't carry more and 9% (3% of total) found the variety lacking. Perhaps a pick-up zone could be designated and advertised along First Street. Vendor outreach continues to improve the available offerings and the market has strengthened considerably from its origins. Over time, and with the help of local media, people in the surrounding area should come to know that the Roslyn Sunday Market is a strong starting point for selling their home-made goods and building a more local economy.

Question 5: What changes would you recommend to improve the Market?

A fifth open-ended question sheet was provided to allow customers to register their thoughts more freely as to what they might like to see. Here is the list of comments in the order of frequency:

4 More prepared food / edibles on site
3 More booths
2 Prices cheaper than grocery store
2 More crafts
2 More art
2 Longer hours
2 Chairs for music / covered sitting area
More music
Less country music
ATM or accept credit cards
More advertising
Brochures at Suncadia
Celebrity guests
Dog friendly
More bread
Bring back snow cones
Huckleberries
More sampling

III. Constructive Comments/Observations

This section allows for feedback from a fresh “outsider” perspective. The team noted elements they liked, what they thought could be improved and questions they had. The RMA team appreciated the chance to observe for the benefit of both the market and to consider new insights and ideas for increasing public participation in local decision-making. Because this section represents the varied thoughts and opinions of different individuals, there may be inconsistencies or contradictions in the comments. These are thoughts, not absolute recommendations.

Physical Site (access, shopper flow, liability issues, organization)

What team members appreciated about the physical site:

- Superb visibility! The layout of four rows of vendors across the 60’ street creating two pedestrian aisles captures everyone’s attention coming through town. There’s no way someone can miss this market!
- Layout is very open and allows easy access to booths.
- Wonderful central Roslyn location pulls people out of their cars and off motorcycles to cruise the market. It’s obvious how many people – once they are walking – will drift into other stores. I’m surprised more businesses aren’t opening their doors and putting out “Sunday Market Special” signs to grab new customers.

- It's a great spot to get attention from travelers passing through.
- Jonine has done an excellent job setting up the market and working thru all the issues.
- Well organized. Nice flow of customers!
- For an owner/operator market it's great. I'm amazed one person could develop such a nice market. Fantastic job!
- It is nice to have the Market Booth with additional products.
- I really like the Roslyn Market Pantry.
- This is a lot for one person to do. I wish there were a way to share the load!
- Signage is clear to guide customers to parking.
- The number of dogs here concerned me at first, but no altercations at all!
- The filled parking spots are a sign of success. I hope businesses realize that as the parking fullness spreads, people don't mind walking to get to the market, especially if local businesses provide some eye candy to intrigue them as well.

Physical Site – Improvements and Questions:

- ❑ I know managers have a lot to do and set up for, but...a few plastic tables & chairs for customers to sit and eat often leads to more spending.
- ❑ A 20' banner across the Pennsylvania Ave declaring "Roslyn Sunday Market 10-2" would reinforce the day and hours so visitors are more inclined to remember when it was that they had a fun time visiting downtown.
- ❑ The rear of the market was weak with the woodcraft only. Adapting to fewer vendors (no-shows or not) any given week is a regular layout challenge.
- ❑ If the music stage were moved back, it would be lovely to set permanent benches on either side of an intimate pocket park to welcome longer stays and take listeners out of the market aisle. Putting hot food nearby would make sense.
- ❑ Seep (pipe discharge) under the tree is a bad spot with accident potential.
- ❑ Is there a possible layout that would highlight the historical roots of the area, taking advantage of the Coal Miner's Memorial?

Atmosphere

(market feel, type of shoppers, conversations, educational activities)

What team members appreciated about market atmosphere:

- Jonine has done an incredible job of creating community in the mountains, as evidenced by the mayor and two other council members participating in this research. Keep up the great work!
- Market is warm and welcoming.
- I think it lends to the "quality of life" in Roslyn for the locals to have a casual meeting place to see neighbors and have conversations that are not centered on work or tourism. This casual, conversational atmosphere gives the market a vibe that is infectious to visitors.



- Feel of being a happening place. One lady I spoke to not only came to buy, but to listen to the music. It's a great addition. I love the idea that it's a place for non-profit groups to ply their wares and advertise.
- Many said the market is consistently improving and enlarging.
- The market has a comfortable, small town feel with substantial variety more typical of a community with a much larger population base.
- Guests are very positive about the market.
- Many commented on how this research is a great way to get input.
- I saw lots of groups with two unrelated parents and 2-4 kids under age twelve.
- The details like covers on the tent weights, tractor whirligig, smiley faces, chalk & bubbles add a fun element.
- I really liked the staff helping on setup and takedown. Vendors seem to really appreciate the help.
- Lots of comments about the cool or cold weather today.
- The market intimacy was palpable. People enjoy the relaxed style.
- It's great to see an artist working within the market, and with a young apprentice.

Market Atmosphere – Improvements and Questions:

- ❑ I'd like to see more vendors offering samples or engaging customers to add to the welcoming feel, like "Where are you folks from? Do you go to other markets where you live? You're welcome to try our cucumbers/jam/lotions." Get the soap woman to put out a 5-gal dispenser and offer customers a chance to wash their hands; it would benefit everyone and give customers an excuse to spend more time looking over her soap at the entrance.
- ❑ Invite local youth and other buskers to practice their music at the entrance, and go on stage for short periods when you don't have professionals performing.

Vendors and Products (product mix, quality, signage, display, service)

What team members appreciated about vendors and products:

- The quality of produce is superior to anything anywhere else I shop.
- Nice big signs showing vendors' home location.
- It is wonderful to see the increase in produce vendors this year.
- Most displays are good.
- Good prices – lower than in Puget Sound markets.
- People love to come to farmers' markets and spend money.
- One customer said it's better than the Ellensburg market.

Vendors and Products – Improvements and Questions:

- ❑ It would be great to have more edible foods on site for people who aren't grocery shopping – all the lookers who might like a quick smoothie, a gyro sandwich, an energy bar, a gooey cinnamon roll, etc.
- ❑ I like the mix. I'd like to have baked goods added.
- ❑ Personally I would like to complete my table shopping for the week by seeing a vendor for organic beef, meats and cheese products. I realize it's difficult to attract vendors from a wider

distance. It would be great to have a wider variety of produce that may not be available with our seasonal, short growing season.

- ❑ The Roslyn Market up First Street has gotten a great reception in its first three months. Is there a way of involving them? Could they make sandwiches on site or sell some local, complimentary products?
- ❑ More prepared food would be good.
- ❑ More visual art for sale would be good.
- ❑ Keep reminding vendors that their 100 sq. ft. is a store for them to fill horizontally and vertically. Encourage a roll-down canvas backdrop.

Key Learning for Participants

- Market flow. The City should utilize parking areas for advertisements, guide books.
- A lot of locals shop here weekly for their produce.
- The first two hours there were more couples with one kid or alone.
- A painting booth for kids! Lots of fun!
- It's difficult to assure accurate customer spending levels in a high tourist market. It would be good to ask how many times shoppers have come this season or last year.
- Your "Sustaining Friends of the Market" music stage banner with all your sponsors is a great demonstration of the tremendous, local community support.

Recommendations for Manager



- ❑ Have City host a workshop for local businesses on how to take advantage of the Sunday Market and build synergies that continue to expand the public awareness of the market, downtown businesses and all the Roslyn has to offer.
- ❑ Given the number of children, you might ask the library or a civic group to provide a kid section or childcare. Parents with free hands will buy more.
- ❑ Encourage each vendor to engage lookers so they become customers because they learn something/ask a question/try a taste/see something funny. Find products desired by visitors to accentuate their positive sense of Roslyn.
- ❑ Continue encouraging vendors to think about color and height variation in order to create a sense of abundance, each having their own retail store.
- ❑ Restaurants in many communities gain great visibility at markets. Ask them to participate with two or three items for sale and they can refer people to their restaurant for a fuller selection. The goal is to help all local business.

- ❑ Would businesses appreciate the chance to use a “Roslyn Business” booth once a season? Each would take one or two turns per season. They could get more creative in their marketing, e.g., build a signpost with business arrows.
- ❑ It was a shock not to see you in the Walk About Map as “Roslyn Sunday Market (Summers 10-2)” – flipping open the cover, I expected to see a Market photo instead of a repeated graphic. Given the Market’s obvious impact on Roslyn’s revitalization, I hope “Roslyn Revitalization” will get with it and help out local businesses by reminding visitors of the key attraction in town. This is a hit! A good Market photo would add some life to the people-less brochure.
- ❑ Consider conducting future research at the main entrance if you want customers to give a more accurate estimate of their expenditures as they are leaving. Give an incentive (coupon, cookie, memento or other) to encourage full participation. Consider a more traditional intercept survey to compare responses and get more demographic information.
- ❑ Ask the City to develop a plan for a pocket park with permanent seating and a recessed stage. Even some flat stones of different sizes, shapes and heights set around the grass become inviting. This is a perfect way to continue the development of sponsors and true community-building.