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# Olympia Farmers Market 2017 Rapid Market Assessment Report



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## I. Introduction

On Saturday, July 15, 2017, a Rapid Market Assessment (or RMA) was conducted at the Olympia Farmers Market in Olympia, WA led by Colleen Donovan, in partnership with Karen Kinney of the Washington State Farmers Market Association; Olympia Farmers Market staff, Mary DiMatteo and Bryce Dazell; along with board president and vendor, Dianna Mullen. This RMA is part of a research project funded through a Cooperative Agreement with the United States Department of Agriculture's Ag Marketing Service, Local Food Research and Development Division. We are grateful for the guidance and support of Samantha Schaffstall.

The purpose of a Rapid Market Assessment is to help a farmers market learn about its shoppers and collect information to improve market operations, strategies, and impacts. A RMA utilizes participatory research methods and includes three parts: 1) shopper counts, 2) a dot survey, and 3) constructive comments and observations from an assessment team about the market's physical site, atmosphere, and vendor mix. The RMA team typically includes a mix of market managers, board members, managers from other markets, agricultural professionals, students and community volunteers. Participating in a RMA provides opportunities for market managers to learn how to conduct cost-effective research on markets, experience another market, and network with other market professionals.

**Figure 1. 2017 Olympia Farmers Market Rapid Market Assessment Team**



*Left to right:* **Beverly King**, Tumwater Farmers Market; **Jamie Wells**, WS Department of Health/SNAP Ed and FINI; **EJ Zita**, Port of Olympia Commissioner; **Natasha Bynum**, Sustainable South Sound and TESC; **Dianna Mullen**, Olympia Farmers Market Board President and Vendor; **Karen Kinney**, WSFMA; **Bailey Roark**, South Puget Sound CC; **Mary DiMatteo**, Olympia Farmers Market; **Rachael Reiton**, farmer and former Chehalis Farmers Market manager; **Colleen Donovan**, RMA Coordinator; **Bryce Dazell**, Olympia Farmers Market.



**Loretta Seppanen**, South of the Sound Community Farmland Trust



**Jamie Milletary**, Thurston Food Bank



**Tara Witten**, WSU Extension Thurston County SNAP Ed



## Market Overview

<b>Market</b>	The Olympia Farmers Market
<b>Market Opened</b>	1975
<b>Incorporation</b>	Washington State nonprofit
<b>Mission</b>	“To promote and encourage the development of local, small scale agriculture and ensure a dynamic Market balance for small, local growers and others to make available their products to residents of this community.” [Source: OFM website]
<b>2017 Season:</b> 152 market days	January to March: Saturday only (1 day) April to October: Thursday, Friday, Saturday & Sunday (4 days) November to December: Saturday & Sunday (2 days)
<b>2017 Market Hours</b>	10:00am to 3:00pm (5 hours)
<b>Location</b>	700 Capitol Way N, Olympia WA 98501; in downtown Olympia
<b>Market Staff</b>	Mary DiMatteo, Bryce Dazell, John Nason and Jim Gotz
<b>Market Volunteers</b>	None. There is also a “Friends of the Olympia Farmers Market” that provides support. WSU Extension Thurston County’s Master Gardeners volunteer to tend market’s on-site Gallacci Garden.
<b>Vendor Fees</b>	% of daily gross sales, variable by vendor type
<b>Vendors</b>	Over 100 farms, processors, crafters, and prepared foods from Thurston, Lewis, Mason, and part of Grays Harbor Counties; plus two resellers under contract selling fruit from Eastern WA.
<b>Currencies Accepted</b>	SNAP, FMNP, debit/credit via market token program
<b>Vendor Sales</b>	Over \$5 million
<b>Visitors</b>	Minimum estimate of 500,000
<b>Community Booths</b>	55 unique nonprofit organizations
<b>Memberships</b>	Olympia Downtown Association, South Sound Food System Network, Tilth Alliance, Thurston Chamber of Commerce, Washington State Farmers Market Association, South of the Sound Community Farmland Trust
<b>Online Information</b>	<a href="http://www.olympiafarmersmarket.com/">http://www.olympiafarmersmarket.com/</a> <a href="https://www.facebook.com/olympiafarmersmarket">https://www.facebook.com/olympiafarmersmarket</a> <a href="https://www.instagram.com/olympiafarmersmarket/">https://www.instagram.com/olympiafarmersmarket/</a> <a href="https://www.twitter.com/olyfarmersmkt">https://www.twitter.com/olyfarmersmkt</a> Public can sign up for Email updates from market website

## Market Community

The City of Olympia is in Thurston County, situated at the south end of the Puget Sound along the Interstate 5 corridor south of Tacoma. Home to the Washington State Capitol and The Evergreen State College, the City of Olympia's current population is just over 51,200 (2016). According to the ESRI Tapestry lookup, 24% of people fit the "In Style" market segment, 12% are "Soccer Moms," and 10% are "Savvy Suburbanites" (<http://www.esri.com/data/tapestry/zip-lookup>). See Appendix 2 for a full description of each market segment. The median household income is around 64K (compared to 61K for Thurston County); median age is 40.6 (older than the county and state median ages); and there is a population density of 1,072 people per square mile (far greater than the rest of the county). According to the 2012 Census of Agriculture, Thurston County has 238 direct marketing farms. In Olympia, there are two farmers markets and a long-time food cooperative with two locations.

## Market Location

The Olympia Farmers Market is in its 42<sup>nd</sup> year and currently operates out of a dedicated market structure owned by the City of Olympia on property owned by the Port of Olympia. It is just north of downtown, surrounded on three sides by Budd Inlet. The site includes infrastructure rarely available to farmers markets: power, on site office space, bathrooms, three ATMs, an ice machine, water to all stalls, and even a commercial kitchen that vendors can use for processing or cold-storage. The current market layout includes over 80 spots for booths. There are numerous places to park close the market. One public lot next to the market holds 240 vehicles; another lot reserved for market vendors, holds 75 vehicles.

Figure 2. Satellite view of market site



Source: Google Maps (accessed 9-6-2017)

Figure 3. Market site map



## II. Estimated Market Attendance

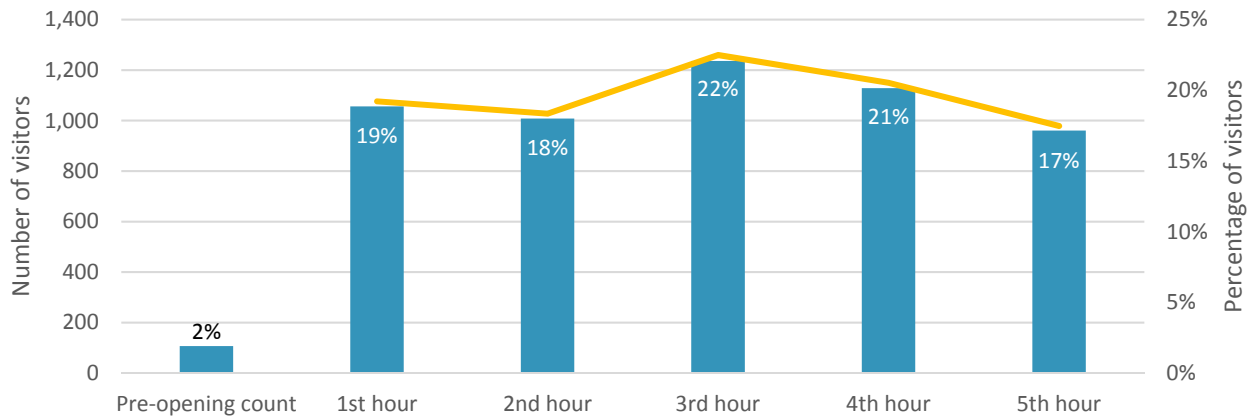
The results presented here represent detailed findings from a **single market day**. Throughout a market season numerous factors influence attendance, including the growing season, weather, and other community events. The annual Capital Lakefair festival was held the day of the RMA. The added traffic and lack of parking may have discouraged farmers market shoppers.

An estimated 5,495 people came to the Olympia Farmers Market on Saturday, July 15, 2017 (Table 1). The shopper counts confirm that this is a busy market, although market staff and vendors said it felt slower than expected due to Lakefair. Potential shoppers entering the market were counted by RMA team members at eight entrances into the market site for a ten-minute period during each hour of the market. The eight entrances were consolidated into five main entrances for this report. The hourly sample counts for each entrance were multiplied by six to get the estimated shoppers per hour. RMA team members counted shoppers already in the market prior to the opening bell using the walk-through method. The hourly counts plus the pre-opening count were totaled to get the estimated attendance for the day. Tally counters were used to improve count accuracy.






**Table 1. Estimated Market Visitors by Hour**

Time	Estimated # of People	Percent of Total
<b>Pre-opening count</b>	107	2%
<b>1st hour: 10:00 am to 11:00 am</b>	1,056	19%
<b>2nd hour: 11:00 am to 12:00 pm</b>	1,008	18%
<b>3rd hour: 12:00 pm to 1:00 pm</b>	1,236	22%
<b>4th hour: 1:00 pm to 2:00 pm</b>	1,128	21%
<b>5th hour: 2:00 pm to 3:00 pm</b>	960	17%
<b>Estimated # of Market Visitors</b>	<b>5,495</b>	<b>100%</b>

**Figure 4. Estimated number of market visitors by hour, 11:00 am to 3:00 pm**



**Table 2. Estimated Visitors by Market Entrance**

North side both sides of stage	West side Michael's to Johnson Berry	Main Door on South side	Eastside including SE bike rack corner + garden	Northeast Corner by ice machine
				
1,884	1,410	498	900	696
<b>34%</b>	<b>26%</b>	<b>9%</b>	<b>16%</b>	<b>13%</b>

Note: The total (98%) does not include the shoppers who were already in the market when the market opened. They were included in the pre-market count.

## Visitor Count Findings and Observations:

- Despite concerns about slower shopper traffic due to Lakefair, the market was still busy with an estimate of almost 5,500 shoppers over a five hour period (Table 1).
- There was a steady flow from 10:00am to 12:00pm, and with peak traffic entering the market from 12:00pm to 2:00pm. The shopper counts dropped off during the last hour of the market.
- Based on estimates, over a third (34%) of shoppers came in through entrances on either side of the stage which is adjacent to good shopper parking. There is also a bathroom in this area which may have influenced the count (Table 2).
- The smallest proportion of shoppers entered the market through the main door which while smaller, is centrally located and facing the main market district with easy access to public transportation options.
- Higher traffic entrances are key locations for important market signage and for strategically placing visually enticing booth displays that lure visitors deeper into the market.
- Keep in mind that higher traffic doesn't necessarily correlate to higher sales at the market. In some cases, larger crowds can deter shoppers who prefer "less hassle" or a quieter setting.

## III. Dot Survey Results

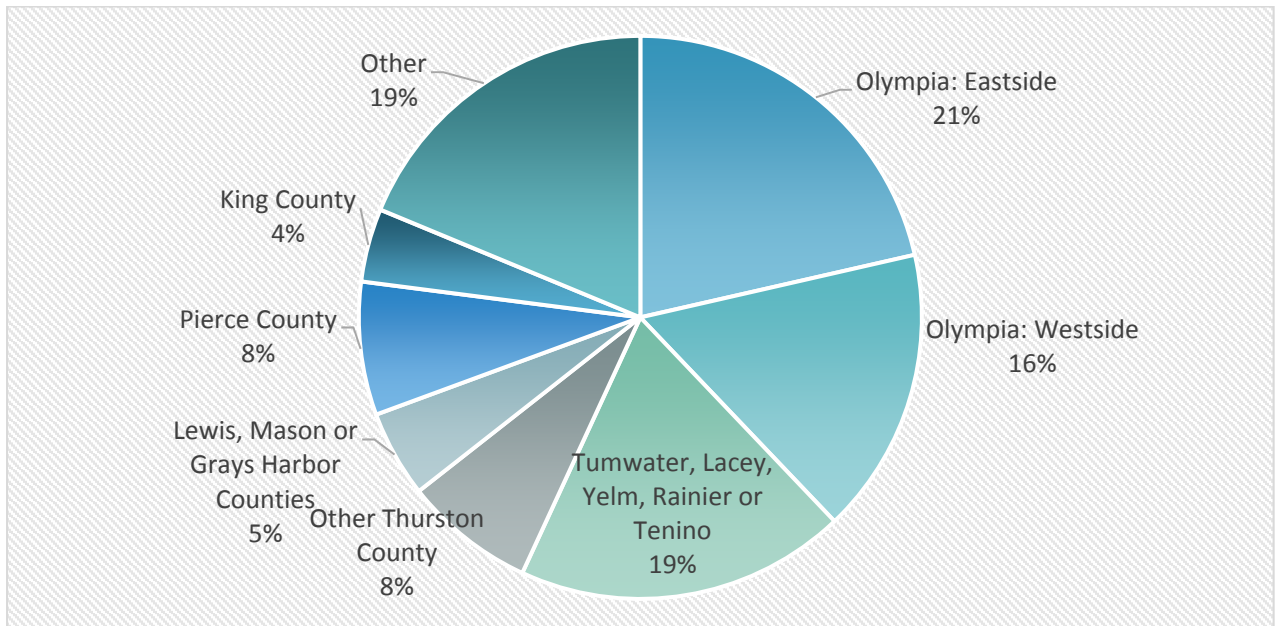
Six dot survey questions and responses were written on large flip charts and set up on easels in the center of the market, by the market office and main entertainment stage/seating area. Throughout the market day, the RMA team actively encouraged shoppers to participate in the survey. Most market visitors willingly participated and some commented that it was "easy," "fun," and "a good idea." The objective was to obtain a representative sample of all shopping groups in the market that day. Each person was given a strip of six dots to indicate his/her answer to each question. The sheets were refreshed at the top of each hour of the market. This allows analysis as to how shopper answers varied by the hour of the market. Starting each hour with a blank flip chart sheet also helps minimize any response bias. On average, 763 people answered the six dot survey questions. This represents an estimated 14% of all people at the market that day.

The first question asked people in the farmers market **Where do you live?** and had 784 responses. Among these respondents, 37% live in Olympia, primarily the Eastside. Another 27% reported living in other Thurston County cities, not including Olympia (Figure 5 and Figure 6). There was a fairly significant portion (19%) that reported living in "Other," meaning in an area

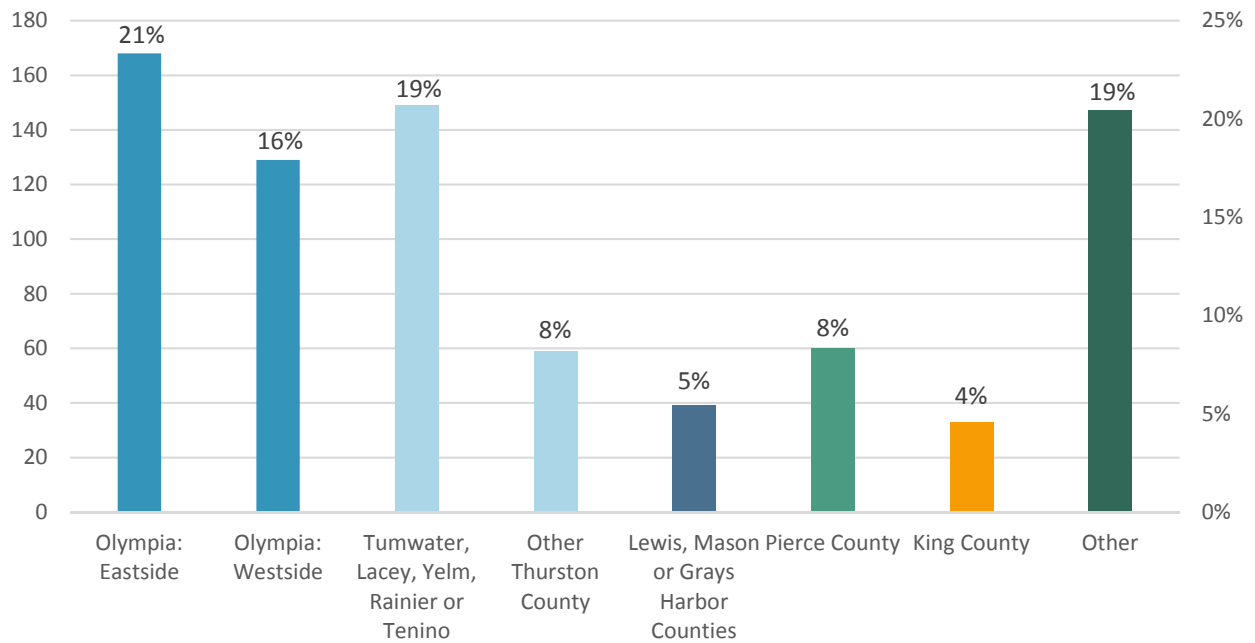


that was not listed as a response. This suggests that the market is drawing a diverse mix of visitors from the local community, regionally, and beyond the South Sound. As indicated in Figure 7, visitors from Olympia were in the market earlier in the day, peaking during the third hour. Likewise, those from Thurston County came earlier and were less present later in the market. Conversely, dot survey respondents from neighboring counties were more present later in the market, and “Other” had an early wave during the first hour and later in the day.

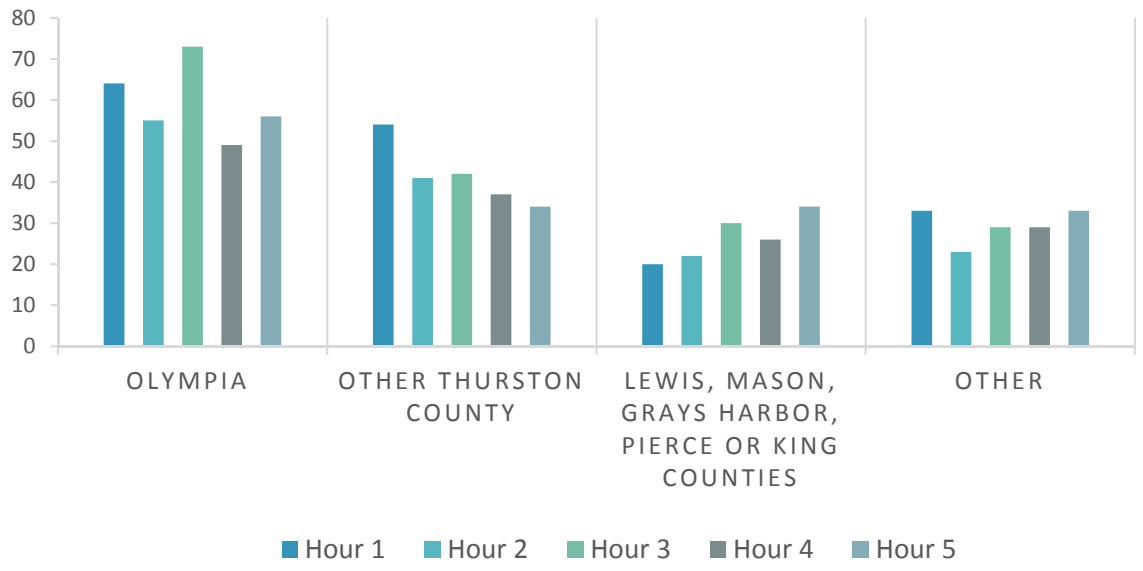
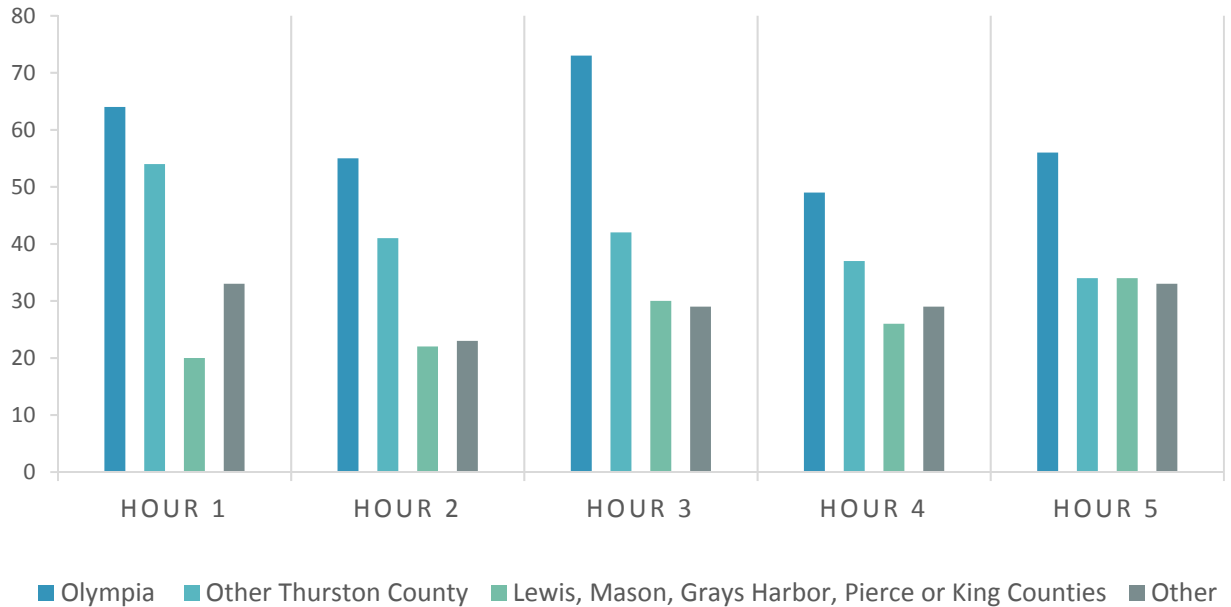
**Figure 5. Where Respondents Live (N = 784)**



**Figure 6. Where Respondents Live by Location (N = 784)**

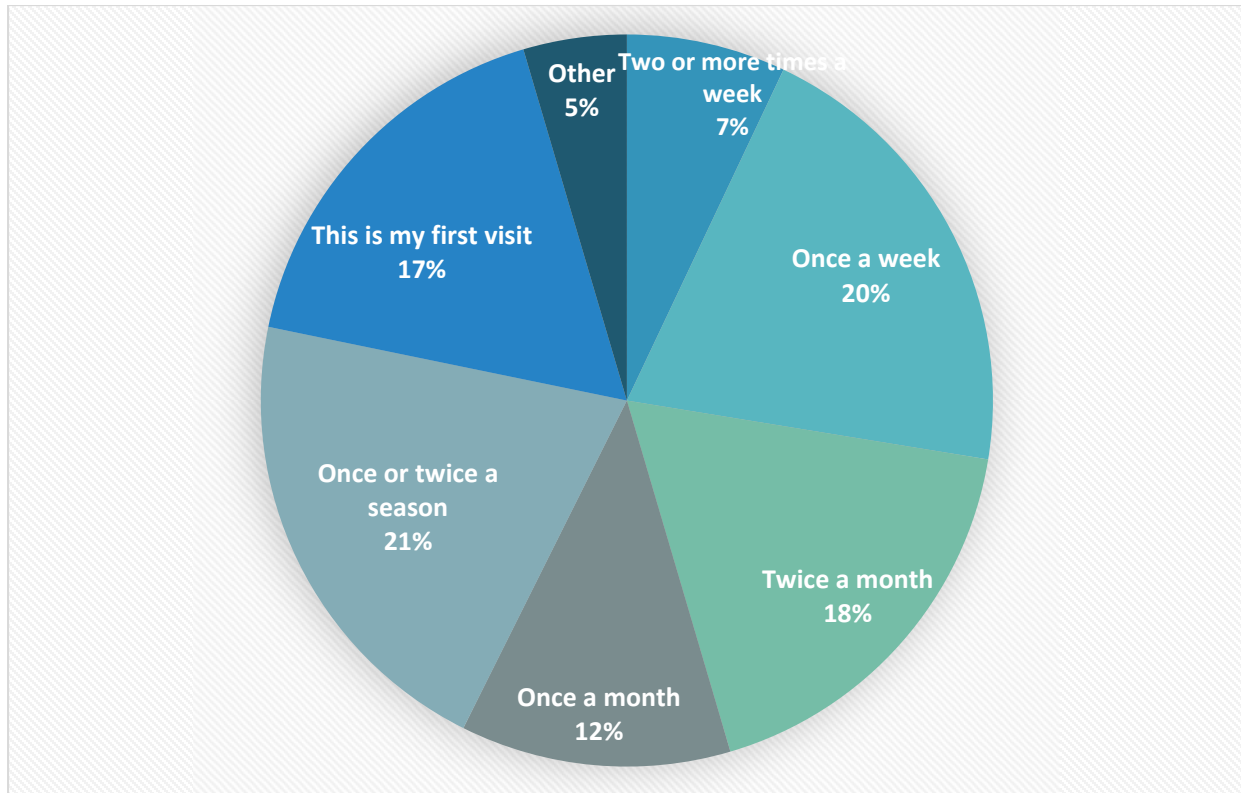


**Figure 7. Where Respondents Live by Market Hour (N=784)**



The second question asked **How often do you shop at this farmers market?** and had 767 responses. Among dot survey respondents at the Olympia Farmers Market, 7% reported shopping “Two or more times a week,” 20% selected “Once a week” and another 18% said they shop “twice a month.” Among less frequent shoppers, 12% said they shop “Once a month” and 21% reported shopping “once or twice a season.” There were also 17% indicating that this was their “first visit” to the market

Figure 8. How Often Respondents Shop at the Market (N = 767)



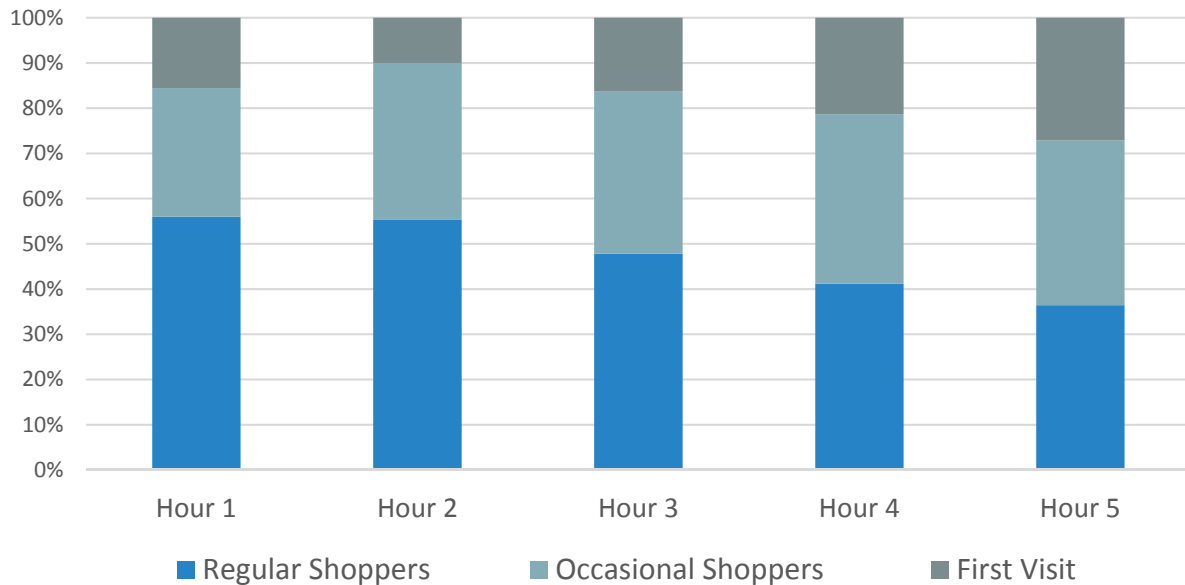
Another way to look at this data, is to group shoppers into three groups based on their frequency of shopping at the farmers market:

1. **Regular shoppers:** dot survey respondents who selected “Two or more times a week,” “Once a week,” or “Twice a month”;
2. **Occasional shoppers:** people who selected either “Once a month” or “Once or twice a season”; or
3. **First time visitors:** those who selected “This is my first visit.”

The 35 people who selected Other were not included in Figures 9 and 10.

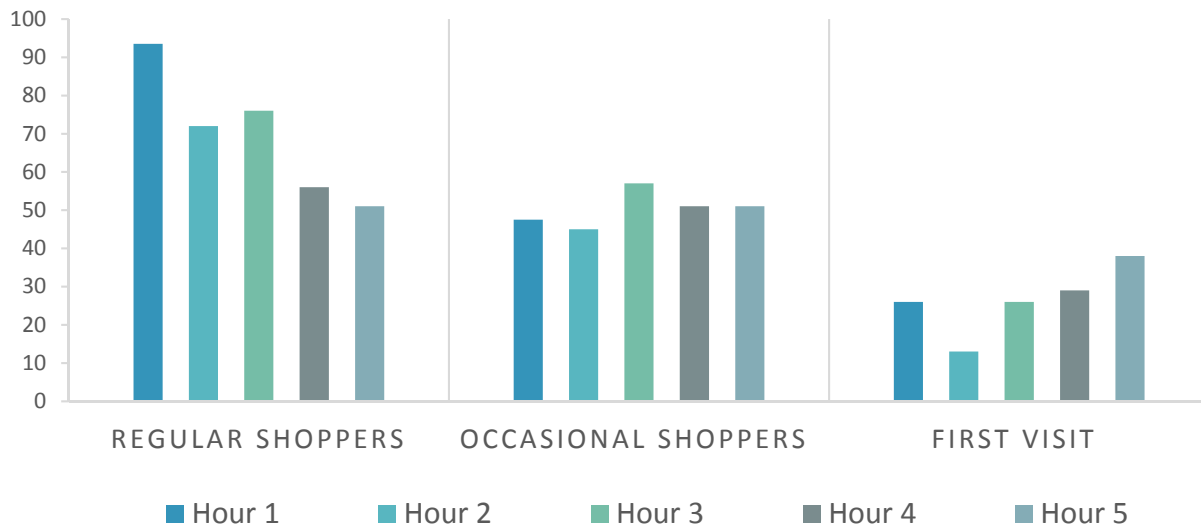
Looking at the composition of the shopper mix by hour indicates the first part of the market (hours 1 and 2) had a larger proportion of regular shoppers, whereas the last two hours (hours 4 and 5) had fewer regular shoppers and more first time visitors. Hour 3, in the middle of the market, around lunch time or from 12:00pm to 1:00pm, had a fairly even mix of shoppers (Figure 9). The proportion of occasional shoppers was fairly consistent throughout the market.

**Figure 9. Hour of the Market by Shopper Frequency (N=732)**



Looking at the type of shopper by market hour affirms these patterns. Figure 10 also illustrates that regular shoppers were in the market earlier, especially hour 1 and 3. Regular shoppers were least likely to be in the market during hour 5. Occasional shoppers were fairly steady throughout the market with the greatest number in the market around lunch time and slightly more towards the end of the market (Figure 10). The first time visitors to the market peaked during the last hour and were least likely to be in the market during the second hour (Figure 10).

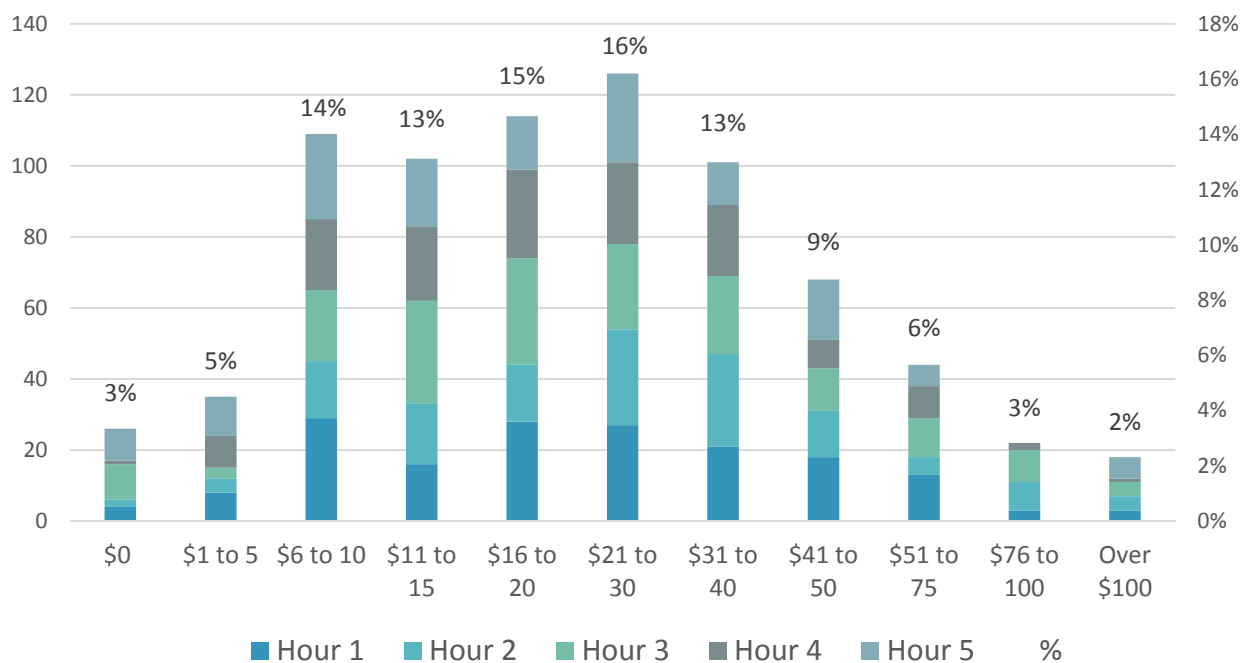
**Figure 10. Shopper Frequency by Market Hour (N=732)**





Questions 3 and 4 asked about shopper spending at both the farmers market and other neighboring businesses or restaurants: **How much have you (or will you) spend at the farmers market today?** and **How much have you (or will you) spend at other downtown businesses or restaurants today?** In both cases, respondents were given a range of spending instead of indicating an exact dollar amount which would be too cumbersome for the dot survey method.

**Figure 11. How Much Respondents Spent at the Farmers Market (N = 765)**



As indicated in Figure 11, the most frequently selected category for spending at the farmers market was “\$21-30” (16%), followed by “\$16-20” (15%). Ninety-seven percent of dot survey respondents spent at least \$1.00 at the market, indicating that they were a *shopper* and not just a visitor. A third (33%) reported spending over \$30.00 and 64% said they would spend \$30.00 or less (Figure 11).

This data from these questions is used to calculate the average shopper spending and the estimated sales.

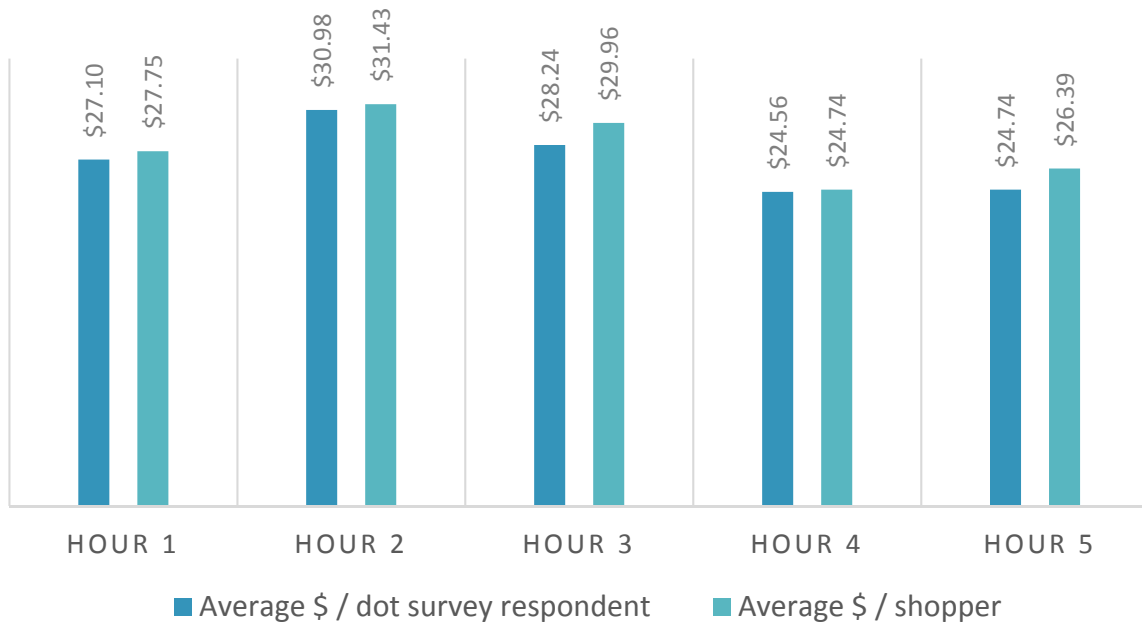
### AVERAGE SPENDING PER SHOPPER

The estimated average sales per shopping group are calculated by assigning a dollar value for each response category. So, for “\$16.00 to \$20.00,” the value is \$18.00 or the mid-point between the lower and higher possibilities. These values are then multiplied by the number of respondents in each category. The total for each category is then added together to get a total estimated spending from all respondents. This total is then divided by the total number of respondents to get the estimated Average Spending per Shopping Group (Table 3).

**Table 3. Estimated Spending at the Farmers Market by Dot Survey Respondents**

Dot Survey Respondents		Estimated Total Farmers Market Spending	Estimated Average Farmers Market Spending
All Dot Survey Respondents	765	\$20,773	\$27.15
“Shoppers” (respondents that spent at least \$1.00)	739	\$20,773	\$28.11

**Figure 12. Estimated Average Farmers Market Spending by Hour**



**ESTIMATED MARKET SALES FOR DAY**

Estimated sales are based on the Average Sales per Shopping Group (including those reporting \$0) multiplied by the Number of Shopping Groups<sup>1</sup>. Given that there is no validated estimate of the shopping group size, three different shopping groups sizes were used for the calculations. The smallest, 1.7, would represent more single people and couples. The largest, 2.0, would represent shopping groups with larger households or families.

<sup>1</sup> The sampling unit in RMAs is the shopping group; shopping groups may consist of individuals, couples, or families. The average size of a shopping group varies by market, depending on the demographics of the area, day of the week, nature of the market, and time of year. If we have an estimated number of shopping groups and an estimate of the average spending, then we can calculate the estimated sales for the day based on these assumptions.

$$\begin{aligned}
 & \text{Total Estimated Shoppers/Shopping Group Size} = \text{Number of Shopping Groups} \\
 & \text{Average Spending per Shopping Group (\$) X Number of Shopping Groups} = \text{Estimated Total Sales (\$)}.
 \end{aligned}$$

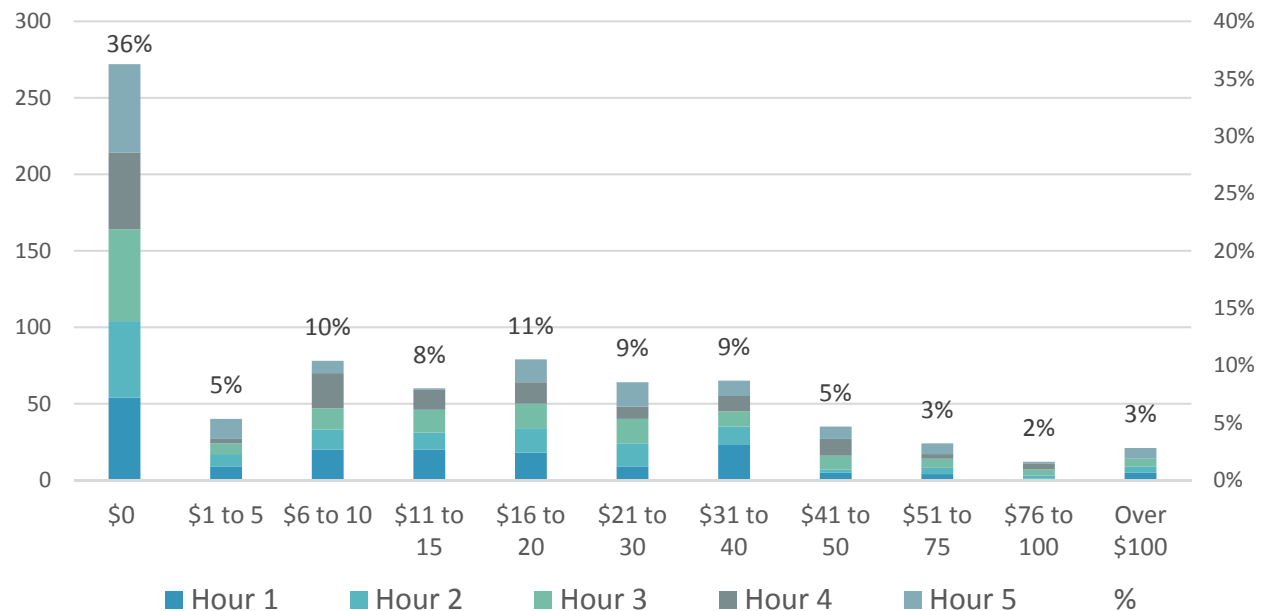
**Table 4. Estimated Shopper Groups and Farmers Market Sales**

Shopping Group Size	Number of Shopping Groups	Estimated Sales for July 15, 2017
1.7	3,232	\$87,774
1.8	3,053	\$82,898
2.0	2,748	\$74,608

With a total shopper estimate of **5,495**, the number of shopper groups ranges from 3,232 to 2,748. Likewise, the estimated total shopper-reported sales ranges from \$87,774 to just over \$74,600 (Table 4). Methods for collecting or estimating farmers market sales vary widely and precision is a significant challenge for vendors as well as the market. Most transactions are cash, inventory controls can be hard to manage, and prices may vary throughout the day as well as by market. In addition to fatigue and imprecise real-time accounting too, there are also potential motivations for vendors to underreport sales to markets. Customer reported spending is also problematic. Nevertheless, there does seem to be a consistent tendency for customer-reported spending to significantly exceed vendor-reported sales in previous RMAs

While Question 3 focused on the farmers market itself, the purpose of Question 4 is to capture spill over spending by farmers market shoppers at other nearby businesses or restaurants. As indicated in Figure 13, almost two-thirds (64%) of dot survey respondents spent at least \$1.00 at other downtown businesses or restaurants, indicating that they were shopping at multiple places, not just the farmers market. The most frequent category selected for spending at other businesses was “\$16-20” (11%), followed by “\$6-10” (10%).

**Figure 13. Respondents Spending at Other Downtown Businesses and Restaurants (N = 750)**



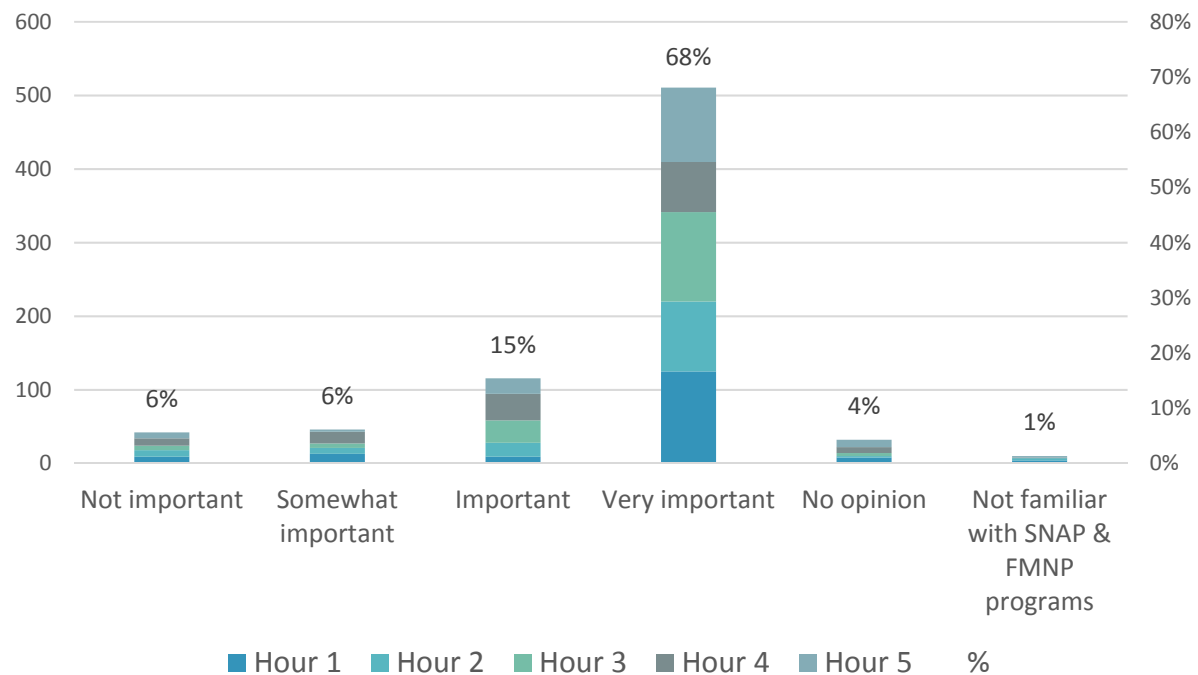
**Table 5. Estimated Spending at Other Downtown Businesses and Restaurants by Dot Survey Respondents**

Dot Survey Respondents		Estimated Total Downtown Spending	Estimated Average Downtown Spending
All Respondents	750	\$ 13,167	\$17.56
Respondents that spent at least \$1.00	478	\$ 13,167	\$27.55

On average, dot survey respondents reported spending an estimated \$17.56 at other downtown businesses and restaurants (Table 5). Among those that reported spending at least \$1.00, the average jumps to \$27.55.

The fifth dot survey question was **How Important is it to you that low-income people can shop at this farmers market with SNAP EBT (food stamp) or WIC/Senior FMNP?** It was designed to collect data on how all farmers market visitors feel about food access programs such as the Supplemental Nutrition Assistance Program (SNAP), formerly known as food stamps, and the Farmers Market Nutrition Program (FMNP). The latter includes a program for Women Infants and Children (WIC) clients and one for low income seniors.

**Figure 14. Importance of Low Income People’s Ability to Shop at Farmers Market with SNAP EBT (food stamps) or WIC/Senior FMNP (N=756)**

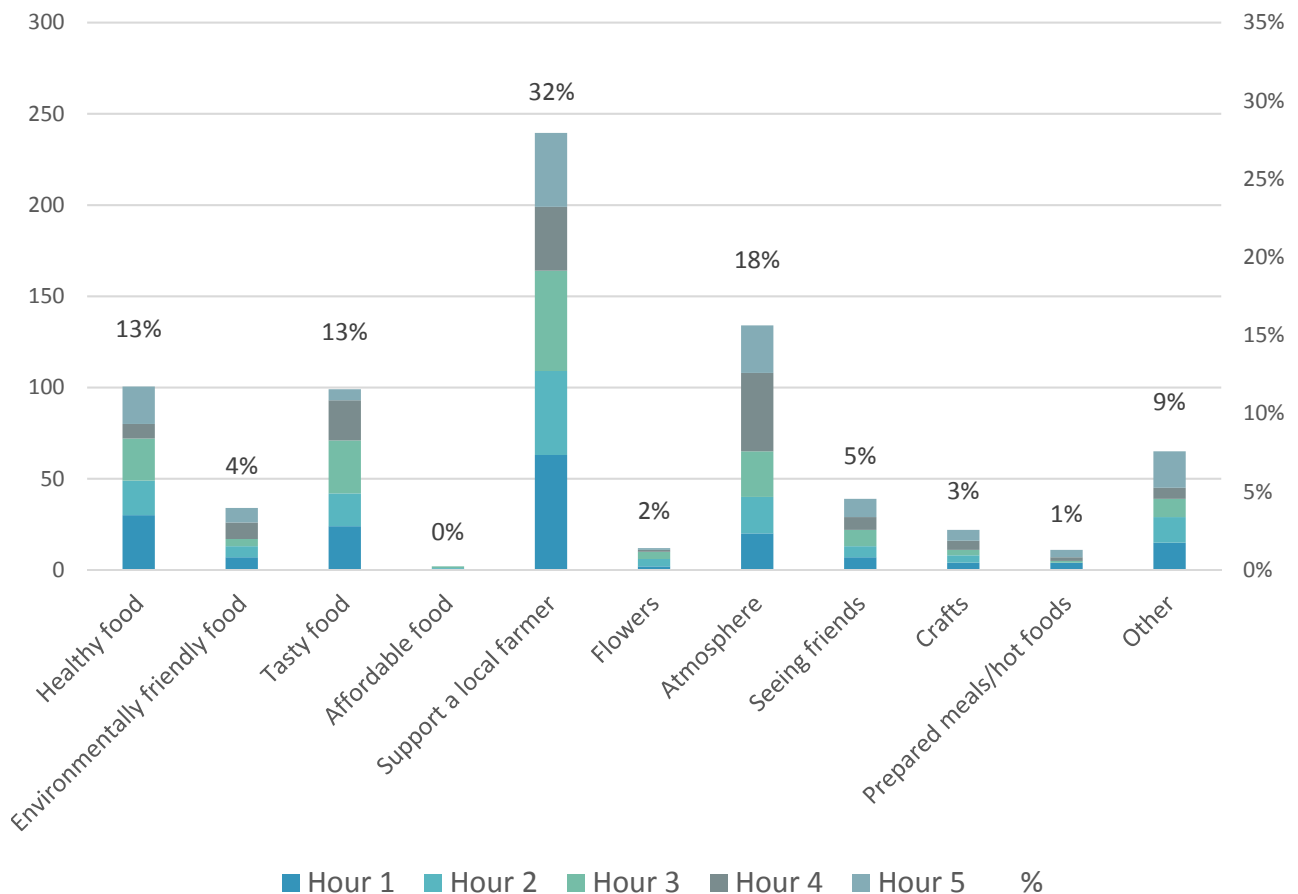




Among the over 750 respondents, 83% indicated that it was “important” or “very important” that low-income people can use their food nutrition benefits to shop at the Olympia Farmers Market. Another 6% indicated that it was “somewhat important” and 10% selected “not important” or “no opinion.” Surprisingly few respondents (1%) indicated they were “not familiar with these programs.” The Quest card logo (for SNAP EBT) and Washington State FMNP logos were included on the dot survey flip chart sheet as a visual cue. There was signage in the market, including a banner at the market information booth next to the dot survey, that promoted EBT. We cannot assume that shoppers knew that SNAP, the Quest card, and EBT all refer to the same program.

The sixth dot survey question asked **What is your primary reason for shopping at the market today?** and had a total of 758 responses. The most frequent response (32%) was “to support a local farmer” followed by “atmosphere” (18%), and “healthy food” and “tasty food” (13% each) (Figure 15). “Affordable food,” “Prepared meals/Hot food,” and “Flowers” were the least frequent responses with from 0% to 2% of responses. On multiple occasions the RMA Team observed shoppers expressing a desire to pick more than one option. It is highly likely that some of these shoppers opted to select “Other” rather than pick one primary reason.

**Figure 15. Primary Reason for Shopping at the Farmers Market (N = 758)**



## IV. Constructive Comments & Observations from RMA Team

As part of the RMA, each member of the assessment team was asked to note his or her observations about the market's physical site, atmosphere, and vendor and product mix. The purpose was to offer helpful ideas from a fresh perspective. Below is a summary of key themes that were noted at the RMA.

We understand that the market may have tried ideas before or have conditions that limit their ability to implement solutions. RMA Team comments are summarized below to share their best thinking for managers' consideration. In some cases, differing suggestions are presented without attempts at reconciliation.

**Physical Site:** *This includes access to the market, parking, flow of people and traffic, liability issues, organization, etc.*

The RMA team greatly appreciated the beauty and organization of the Olympia Farmers Market, especially its proximity to transit, adjacent parking, as well as the market structure and gardens. Team comments focused on market layout and flow, parking, the location, lighting, and infrastructure.

### Market Layout and Flow

*The market is very comfortable – lots of seating and shade, parking lots, and bathrooms.*

*Excellent layout. Each vendor is well organized.*

*I like the little separate pockets for prepared foods and their customers. Creates small spaces to get away from crowds.*

*Customer bottlenecks near roped off (delineated lines) for meat vendor, not leaving much shopping area for other vendors in that area.*

*Multiple open entrances. Good flow/spacious walking paths. Clear signage. Stage/restaurant section separated from craft/farm vendors.*

*Major bottleneck. Johnson Meats is busy. Double lane can crowd aisle, block access to nearby vendors. They say maybe it sometimes brings in business.*

*Cashier places at Sullivan's fruit are tight spots for people with any mobility issues – it works, but more space – even 6 inches -- might help.*

*Many people passed through the outdoor space by stage and restaurants but do not really go into the actual market.*

### Parking

*Parking appears plentiful but additional signage may be helpful to indicate rear lot.*

*Parking – obviously, parking is limited but fortunate to have so many parking lots nearby. Flow of people – I did not see anything unusual other than people seemed to*

*prefer to park/enter on the east side. Even people who parked in the north lot appeared to walk around to the east entrance.*

### Market Location

*Nice location relative to downtown, waterfront and ornamental/shade/sitting garden. Sidewalks are mostly clear of debris or booths.*

*The exterior to the market space, curb appeal could be improved, but the accessibility and convenience as is now is really functioning effectively.*

### Lighting

*Natural lighting – skylights can allow too much direct sun on produce, pay attention to placement. Diffusing light helps – noticeable difference of booths with natural light better artificial light.*

*Sort of wish it was a bit brighter/lighter inside the market. I like the wood. Vendors friendly, answered questions.*

*Reasonable and numerous accommodations for shade and good balance of sunned areas.*

*It's warm and bright outside of the structure, and a comfortable temperature under the shade.*

### Market Infrastructure & Signage

*Having an undercover area really promotes an easy place to shop.*

*ATM machines big thumbs up.*

*Having a waste center is great, love the statement and options encouraging, but could have been more waste receptacles throughout.*

*Not clearly marked and locatable bathrooms. Also minimal info/marketing for EBT/SNAP.*

*Pave the way buy a brick banner sign over door – is this program still going? Sign doesn't have any info on how to learn more or participate.*

*What about idea of having a market board, community board to post updates, events, etc. versus having so many posters everywhere? One central location with a few additional around might help with lessening sign fatigue.*

### Suggestions:

- Make the bathrooms easier to find: Maybe paint the path to the bathroom or the building a different color so people can say – find the building with the orange roof or column, etc. Signage by the office area about the bathroom could help.
- Create consistent wayfinding signs for important infrastructure: restrooms, ATM, water, etc.

- Is there a way to close walls and ends with plastic or glass in the winter? Let in light, keep in heat, keep wind and damp out, add ceiling heaters and fans.
- Building and gardens look nice. I think deadheading plants helps with overall look especially to a market where plants are an essential part of our product offerings. The azaleas near the bus stop could use some deadheading.
- It's tough to tell market staff and vendor from customers, that would be helpful to customers. Maybe everyone wears a lanyard with a certain color as their credentials?

**Atmosphere:** *This includes the overall feel of the market, type of shoppers, conversations, educational activities, community connections, etc.*

The RMA team appreciated the market's overall positive atmosphere and specifically commented on the friendly feel and music. Some team members observed a difference in the atmosphere near the stage area versus the indoor market area. For some, the absence of educational activities was noted.

*The things the market does to make the farmers market visit an experience, music, hot food vendors, really work.*

*Overall (the market) feels warm and welcoming. The day feels like an engagement and investment in Olympia.*

*Great smells around every corner. This is an ideal market for comfort and community interaction. Potted plants and trees add to a more natural feel. Excellent place to hang out, meet with friends, tourism, etc.*

*The vibe of the stage/restaurants is very different than the vibe under the structure/at the booths. Definitely a carnival-like atmosphere by stage, snow cones, fried food, etc.*

*End of market closing bell was great, especially when other vendors started ringing their own bells too. Made it seem more festive somehow. I love this markets atmosphere. Thank you!*

### Welcoming, Friendly Feel

*People smiling and happy, running into friends and engaging.*

*Shoppers were very friendly around the dot survey area. I was impressed with how enthusiastic they were to do the dots.*

*Happy, mellow people today, vendors and customers.*

*Pleasant sense of community, mix of ages, families, etc.*

*Friendly, lots of communication of vendors with customers*

### Music

*Love that music isn't too loud, just pleasant background.*



*The music is just perfect today and I hope to enjoy similar tunes in the future! Makes me want to mingle, invite friends, spend more time, have a meal.*

*Some vendors concerned about noise, better sales when band is quieter.*

### Educational Activities

*No apparent educational activities today.*

*Are there kids activities? Where?*

**Vendors and Products: This includes access to the market, parking, flow of people and traffic, liability issues, organization, etc.**

### Signage and Displays

*Beautiful produce displays – looks abundant and colorful. Good vendor signage.*

*It was sometimes hard to find prices at the different vendors. Signage/font or print was too small. Not sure if this is intentional though.*

*Prices consistently marked and clear.*

*Resellers signage about where farms products are coming from is scarce. Not obvious they are reselling.*

*Prepared food vendors do not highlight farmers market local products. Unclear what standards are for prepared food.*

*Some vendors concerned about light – backlighting bad for display, sunlight bad for produce, good for crafts, LEDs good for everything.*

### Friendly Vendors and Customer Service

*So much good vendor customer interaction. Two or three customers bending toward the vendor to talk one to three minutes. Saw this at three or four booths in short walk, several times of day.*

*Most vendors seem very customer service oriented.*

### Vendor Mix and Product Quality

*A wide assortment of food, farms, art, dessert, bakery, miscellaneous artist. Artisanal products, palm readings etc. Variety of interests represented. Could be more culturally diverse products present, room to expand variety available and present. Spacing of and for vendors looks sufficient.*

*I noticed lots of crafts – seems excessive for a farmers market – same with bakeries.*

*Nice variety of crafts, produce, meats, fish, soaps, bakery, etc.*

*Not enough eggs and honey.*

*A drink vendor with tea or juice would be a great addition.*

*Apples with stickers look like they are grocery store quality.*

*Beautiful produce, high-quality, at most stands. Most vendors are very clean and careful.*

*Consider messaging or signage to communicate market standards for all products sold.*

#### Suggestions:

- Couple of new vendors mentioned they didn't know how to donate produce at end of each market day to food bank. Saw food bank coordinator and she was unsure if they're collecting every day and if their volunteers have a way to identify new farms or check in with farms about weekly produce donations.

## V. Conclusion & Recommendations

The Olympia Farmers Market is a large, multi-day, year-round market with a mature organization and experienced staff and board. Currently, over 100 unique farm, processor, prepared food, craft and reseller businesses vend at the Olympia Farmers Market and report annual sales in excess of \$5 million. In partnership with the City and Port, it operates 150 plus market days per year and has one of the few permanent, dedicated farmers market structures in Washington State. The Olympia Farmers Market is a regional institution that inspires many and may also reduce its nimbleness when facing an increasingly competitive marketplace, consumer demands, and limits to vendors' capacity. Given the complexity of its market year with up to four days per week and operating in winter and shoulder seasons as well as peak season, it is important to keep in mind that the RMA data presented here represents a Saturday market in July. In order to fully represent the full range of the Olympia Farmers Market's shopper patterns and vendor/product mix, similar data would need to be collected on other market days and at other times of the year.

This is Thurston County's largest market, and very busy with almost 5,500 visitors estimated, despite parking and crowd complications for shoppers from the neighboring Lakefair festival (Table 1). The dot survey results for July 15 indicate that 97% of visitors are farmers market shoppers (Figure 11). The market primarily draws shoppers from Olympia (37%) or other cities in Thurston County (27%). Fewer (17%) market visitors live in neighboring counties (Figure 6); however, almost one in five (19%) reported "Other" which suggests people visiting from outside of Western Washington.

The farmers market is adjacent to an active downtown corridor with waterfront views that reinforce the market's "destination" character. Visitors primarily entered the market through the "north side" by the stage (34%) and the "west side" (26%) (Table 2). A good-sized parking lot is available next to the market and serves multiple businesses. The infrastructure available

to the market is impressive with build bathrooms, an ice machine, ATM, office, storage, and commercial kitchen/cold storage.

On average, market shopping groups spent an estimated \$28.11 at the Olympia Farmers Market on July 15, 2017 (Table 3). The estimated spending peaked during the second hour at \$31.43 (Figure 12); there were also more “regular” shoppers (Figure 10). “Local” Olympia shoppers peaked during the third hour, but were also steady early and late in the market (Figure 7).

Most (64%) of farmers market visitors reported also shopping at other downtown businesses and restaurants (Figure 13). The Olympia Farmers Market currently manages a token program for credit and debit cards and SNAP EBT. It is also participating in the WIC and Senior FMNP program, but does not currently have an incentive program for SNAP clients. Over 80% of dot survey respondents indicated it is “important” or “very important” that low-income people can shop at this market with their SNAP EBT and FMNP benefits (Figure 14). When asked about their primary reason for shopping at the Olympia Farmers Market, the most frequent response was “to support a local farmer” (32%), followed by “atmosphere” (18%), and “healthy food” and “tasty food” (13% each) (Figure 15).

**Recommendation 1: Strategize around possible distinct market shopper segments**

The RMA data suggests that the Olympia Farmers Market attracts at least two broad market segments: “Local-Regular Sales-Drivers” and “Visitor-Atmosphere Seekers.” The RMA data is not correlated, nor definitive. Therefore, this typology needs to be tested and refined.

Local-Regular Sales-Drivers	Visitor-Atmosphere Seekers
<i>More likely to:</i>	<i>More likely to:</i>
<ul style="list-style-type: none"> <li>○ Live in Olympia or other Thurston County city (Figure 5, 6);</li> <li>○ Shop more frequently;</li> <li>○ Shop earlier, especially during first two hours of market (Figures 8, 9);</li> <li>○ Spend higher than average (Figure 11);</li> <li>○ Say “supporting local farmer” is primary reason for shopping at the market (Figure 14)</li> </ul>	<ul style="list-style-type: none"> <li>○ Live in neighboring county or beyond the South Sound (Figure 5, 6);</li> <li>○ Shop occasionally;</li> <li>○ Mostly shop later, increasing through the market day (Figures 8, 9);</li> <li>○ Spend less than average (Figure 11);</li> <li>○ Say “atmosphere” is primary reason for shopping at the market (Figure 14)</li> </ul>

Should these farmers market visitor segments hold true, consider incorporating this understanding into market planning, outreach, and design as well as to maximize vendor offerings.

For example, thinking about these two broad categories, encourage vendors to be intentional about who their products are aimed at; how they are designed (e.g., for people with already full baskets or for people needing a thank you for their dog sitter); how they are priced; what messaging they need to encourage sales; and adjusting what they promote throughout the

market day. Do an internal inventory of how/what the market is selling to these two market segments in terms of overall vendor mix as well as at individual vendor level.

From a market perspective, also consider how to adjust the music schedule throughout the day, work to ensure excellent parking earlier in the market; make sure way-finding signs are fresh in the later part of the market; and target gratitude, “loyal market shopper” perks, and shopping amenities earlier and more locally.

Likewise, marketing and outreach investments can be targeted geographically, playing to the interests of each segment. Alternatively, the market may decide to focus on one market segment alone, depending on your goals and strategies. One key goal could be to increase the number and “market attachment” of the “Local-Regular Sales-Drivers.” This is typically done through market experiences, relationships to the market, vendors, and products; as well as figuring out how to get these shoppers to recruit their trusted peers to the Olympia Farmers Market. Keep in mind that while the “Visitor-Atmosphere Seekers” segment may not yield the highest vendor sales, they may be strategic in terms of building market visibility, public support, and attending special events.

### **Recommendation 2: Evaluate micro-geography of market to improve inward flow.**

As noted by the RMA Team, the Olympia Market structure and site has a distinct physical feel and guides consumer behavior in particular ways. Unlike most other markets, many of the typical “moving parts” are permanent and the scale of infrastructure is significantly more substantial. While some flexibility may be sacrificed, there are incredible benefits as well. The trick is to creatively adjust market details to improve overall flow so that shoppers can more easily find/buy from vendors and have an “easy,” positive experience moving through the space.

More specifically, this may mean:

- Looking at the visual and sensory relationship between “inside” and “outside” spaces. As mentioned by RMA Team, they have very different energy. How do people move between the two sections? Does everyone in the food/music area also go through the inside?
- How can possible “bottlenecking” around specific vendors be improved?
- Can more or more targeted lighting be available inside market area?
- Are the placement and number of “garbage/recycling/composting” bins maximally convenient and keeping the market “clean”?
- Develop a consistent design (color, size, font, feel) of wayfinding signs for important infrastructure: bathrooms, parking in the rear, maybe the ATM, market information.

### **Recommendation 3: Invest in “telling the story” of the Olympia Farmers Market**

The Olympia Farmers Market has a richness of history over the decades as well as a richness of experience for the shopper – be it their “first visit” or hundredth. Given this complexity, it may



be an opportune time to reflect on what that “meta-narrative” is for the market community and which pieces can be leveraged to a singular success story. While difficult, messy work, the market may more effectively and efficiently be able to frame both internal and external communication. How can the singular success story be married with contemporary design tools to break through the competition for “local food shoppers” and the right vendor mix.

Specific components may focus on:

- Market authenticity, including its values, goals and standards for vendors; who the local farm vendors are (given we know shoppers value this), and how buying directly from farmer or artisan has a cascade of positive economic, community, and economic impacts.
- Transparency around work that market staff, board, and vendors do, including ways the market gives back to the community (e.g., managing labor-intensive food access programs that shoppers say are important); and its leadership (or partnerships) in issues shoppers may care about.
- Need for local “time, talent and treasure” to help market realize its full potential on a grassroots budget.

## Appendix 1. Dot Survey Questions, Responses, and Counts

# Olympia Farmers Market—July 15, 2017

## Rapid Market Assessment

An average of 763 people answered each of the dot survey questions. This represents an overall estimated intercept rate of 14%.

Dot Survey Question	Responses	Total	%
<b>1. Where do you live?</b>	Olympia: Eastside	168	21%
	Olympia: Westside	129	16%
	Tumwater, Lacey, Yelm, Rainier or Tenino	149	19%
	Other Thurston County	59	8%
	Lewis, Mason or Grays Harbor Counties	39	5%
	Pierce County	60	8%
	King County	33	4%
	Other	147	19%
	<b>Total Q1</b>	<b>784</b>	<b>100%</b>

<b>2. How often do you shop at this farmers market?</b>	Two or more times a week	54	7%
	Once a week	157.5	21%
	Twice a month	137	18%
	Once a month	91.5	12%
	Once or twice a season	160	21%
	This is my first visit	132	17%
	Other	35	5%
	<b>Total Q2</b>	<b>767</b>	<b>100%</b>

<b>3. How much have you (or will you) spend at the farmers market today?</b>	\$0	26	3%
	\$1 to 5	35	5%
	\$6 to 10	109	14%
	\$11 to 15	102	13%
	\$16 to 20	114	15%
	\$21 to 30	126	16%
	\$31 to 40	101	13%
	\$41 to 50	68	9%
	\$51 to 75	44	6%
	\$76 to 100	22	3%
	Over \$100	18	2%
	<b>Total Q3</b>	<b>765</b>	<b>100%</b>

Dot Survey Question	Responses	Total	%
<b>4. How much have you spent (or will you spend) at other downtown businesses or restaurants today?</b>	\$0	272	36%
	\$1 to 5	40	5%
	\$6 to 10	78	10%
	\$11 to 15	60	8%
	\$16 to 20	79	11%
	\$21 to 30	64	9%
	\$31 to 40	65	9%
	\$41 to 50	35	5%
	\$51 to 75	24	3%
	\$76 to 100	12	2%
	Over \$100	21	3%
	<b>Total Q4</b>	<b>750</b>	<b>100%</b>

<b>5. How important is it to you that low-income people can shop at this farmers market using SNAP (food stamps) or WIC/Senior FMNP?</b>	Not important	42	6%
	Somewhat important	46	6%
	Important	115.5	15%
	Very important	510.5	68%
	No opinion	32	4%
	Not familiar with SNAP & FMNP programs	10	1%
	<b>Total Q5</b>	<b>756</b>	<b>100%</b>

<b>6. What is your primary reason for shopping at this farmers market today?</b>	Healthy food	100.5	13%
	Environmentally friendly food	34	4%
	Tasty food	99	13%
	Affordable food	2	0%
	Support a local farmer	239.5	32%
	Flowers	12	2%
	Atmosphere	134	18%
	Seeing friends	39	5%
	Crafts	22	3%
	Prepared meals/hot foods	11	1%
	Other	65	9%
	<b>Total Q6</b>	<b>758</b>	<b>100%</b>

## Appendix 2. Tapestry Demographics

<http://www.esri.com/data/tapestry/zip-lookup>

