

A Survey of Shoppers
at the
Western North Carolina Farmers' Market

Prepared for:



by

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The Western North Carolina Farmers' Market (WNC Farmers' Market) is one of five farmers' markets owned by the state of North Carolina and operated by the North Carolina Department of Agriculture and Consumer Services (NCDA&CS). The market was first opened in 1977 and currently operates seven days a week, 365 days a year. The market includes both retail and wholesale operations and is one of the largest venues for fresh fruits and vegetables in the region. It is also a place where many of the region's consumers, visitors and small businesses go to find farm-fresh food.

The Appalachian Sustainable Agriculture Project (ASAP) is a nonprofit organization dedicated to sustaining farms and farming in Western North Carolina (WNC)) through programs and services designed to promote local consumption of locally-grown food and farm products. Since 2003 ASAP has conducted a series of surveys and other research designed to assess the food and farm economy in the region, with an emphasis on expanding local markets for local farm products.

In the fall of 2006 ASAP initiated a survey of shoppers at the WNC Farmers' Market in cooperation with market staff. The goals of the survey were:

- to explore reasons why shoppers visit the WNC Farmers' Market;
- to examine shopping and spending patterns among shoppers at the market; and
- to gauge awareness among market shoppers about the *Local Food Guide*, which is the main way ASAP communicates information about local food and farms to consumers.

Surveys were conducted by students from Warren-Wilson College, a four-year liberal arts college which teaches students through an integrated triad of academic study, useful and productive work, and service to others beyond the campus community. The students were enrolled in an Environmental Attitudes course and volunteered to collect data for ASAP as a service-learning project. For the survey, a total of 75 interviews were completed by the students on three separate days in September. September is typically a busy time at the market, though there are often more sales in the wholesale area of the market during September related to regional apple harvesting.

The WNC Farmers' Market

The WNC Farmers' Market offers growers several ways to market their crops. Through a designated "Farmer Only" shed, producers can market direct to consumers and small business operators. Otherwise, producers can sell their products to any of the retailers, wholesalers or small dealers who operate at the market.

In total, the market consists of fourteen separate buildings. The retail section of the market includes a garden center and two buildings where shoppers can buy fresh produce, baked goods, some meats and cheeses, and other handcrafted items as well as a wide variety of trees, plants and garden supplies. Approximately 25% of market sales occur in these three buildings.

The remaining 75% of market sales occur in the larger volume sheds located in a separate section of the market from the retail buildings. There are five truck sheds with spaces that are rented to

farmers and dealers on a year-round basis. One shed is reserved for farmers who sell only what they grow (the “Farmer Only” shed) while the other truck sheds include both farmers and dealers. The emphasis on wholesaling is one feature that differentiates the WNC Farmers’ Market from other state-owned markets.

Also on the site of the WNC Farmers’ Market are three buildings used by small dealers and wholesale companies. These companies sell produce to grocery stores, restaurants, institutions and roadside markets in WNC and other regions. They typically buy produce for resale from the large volume truck sheds at the market. The remaining two buildings at the market house a free-standing restaurant and administrative offices.

Table 1 provides some information about selected fruits and vegetables sold at the market in 2005. Other major types of fruits and vegetables sold that year include cabbage, corn, cucumbers, peppers, squash and strawberries, though complete sales data for those crops are not available.

	Volume sold ¹	Approximate equivalent in pounds
Apples	19,271 bushels	925,008
Beans	7,083 bushels	212,490
Cantaloupes	82,909 units	497,454
Onions	8,906 50-lb bags	445,300
Peaches	20,108 ½ bushels	482,592
Irish potatoes	8,920 50-lb bags	446,000
Sweet potatoes	4,720 40-lb boxes	188,800
Tomatoes	54,411 25-lb boxes	1,360,275
Watermelons	34,881 units	348,810

Source: WNC Farmers’ Market.

¹These volumes represent only the amount of produce that was checked in at the gate. It does not include wholesale and truck shed vendors who bring in their own products or individuals with annual delivery permits.

Because the market is largely a collection of independent retailers and wholesalers, sales volume in dollars for any of these crops is not available. It is also not possible to distinguish what portion of the food sold at the market was grown by WNC producers and what portion was grown in other places and sold at the market by local retailers, dealers and wholesalers.

Shoppers at the WNC Farmers’ Market

About 25% of shoppers completing a survey at the market were residents of Asheville and another 36% were residents of other communities in WNC. Overall, then, close to 40% of shoppers at the market on the days of the surveys were visitors to the region, some from other parts of North Carolina and some from other states. Where appropriate, results are reported separately for shoppers who reside in WNC (“regional shoppers”) and those from other places (“visitors”).

Most survey respondents were infrequent shoppers at the market. Many of the visitors indicated that this was their first time at the market or that they shopped at the market only a couple of times a year or less. Even among regional shoppers, however, more than 40% reported that they shop at the market only a couple of time a year or less. Still, more than half of all regional shoppers reported visiting the market with some regularity – generally somewhere between every week and once a month.

Spending at the WNC Farmers’ Market

Shopper reports of estimated spending at the WNC Farmers’ Market suggest that visiting the market is as much about the experience as it is about buying food. The average amount shoppers predicted that they would spend at the market was \$14, with the most common category of spending between \$0 - \$5. Some shoppers indicated that they simply enjoyed browsing at the market.

Overall, shoppers acknowledged that their farmers’ market purchases represent only a small portion of their total food spending. Shoppers reported that they spend about 87% of their food budget at other food stores and between 10% and 15% of their food budget at either this market or other farmers' markets. Interestingly, there was very little difference in these proportions between shoppers who visited the market infrequently and those who said they shopped at the market regularly. This finding calls into question the validity of the self-reported spending numbers but it supports the well-established conclusion that the majority of all food spending takes place in food stores and not farmers’ markets.

Motivations for Shopping at the WNC Farmers’ Market

Shoppers were asked to rank six different reasons why they shop at the market in order of importance. The reasons are listed below in the order that they were ranked.

Figure 1: Reasons for Shopping at the WNC Farmers’ Market Ranked by Market Shoppers

1. Freshness
 2. Supporting farmers
 3. Low prices
 4. Benefits to the region (local farmers, local economy)
 5. Market atmosphere
 6. Environmental benefits
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This research confirms what other national and local research has found – that freshness is one of the most important qualities when consumers choose where and what type of produce to buy. There were no significant differences in how the reasons were ranked by regional shoppers compared to visitors.

Shopping at Other Farmers' Markets

Only 37% of WNC residents who shopped at the WNC Farmers' Market on the day of the interviews reported that they also shop at other farmers' markets. Other markets the shoppers patronize include farmers' tailgate markets, roadside stands and other small produce markets. Word of mouth was by far the most common way people reported finding out about the WNC Farmers' Market.

	Percentage of Respondents (N=75)
Word of mouth	63%
DOT road signs	15%
Passing by	9%
Radio, TV, magazine, newspaper	4%
Tourism agency/guidebook	3%
Other/No answer	6%
Total	100%

Awareness about ASAP's *Local Food Guide*

Shoppers were asked three questions designed to measure awareness about ASAP's *Local Food Guide*. Overall, 28% of survey respondents were familiar with the guide. That number was slightly higher among residents of WNC, with 37% of those respondents reporting familiarity with the guide. Less than a third of those, however, had used the *Local Food Guide*. The online version of the *Local Food Guide* was used less frequently than the print version, with fewer than 10% of those familiar with the guide reporting using that version.

Opportunities

Recognizing the common ground between ASAP's Local Food Campaign and the WNC Farmers' Market paves the way for future collaboration around efforts to increase consumption of food and farm products produced by the region's farms. At its core, this common ground concerns shopper motivations. The same things that motivate WNC Farmers' Market shoppers – freshness of food and shoppers' perceived ability to support farmers with their food dollars – are in large measure the driving forces behind ASAP's campaign.

With the development of a new, large and centrally located farmers' market set to open in downtown Asheville in the Spring of 2008¹, a focus on collaboration rather than competition will be especially important. A united effort to promote farm-fresh food can yield benefits to both the WNC Farmers' Market and the local producers whose interests ASAP represents in its campaign. Appropriate labeling of food produced in the region will assure that any premiums

¹ More information at <http://www.asapconnections.org/special/citymarket/index.htm>.

associated with the food being locally-grown will accrue to the region's farmers.²

Historically, ASAP's work to expand local markets for local farm products has focused on supporting the development and promotion of small farmers' tailgate markets in communities throughout the region. More recently ASAP has expanded to include larger scale markets, places where consumers typically get food – restaurants and retail food stores, for example – and where expanding local sales can have a bigger impact on the region's farm sector in terms of quantity of food sold. Sometimes that means advancing the work of distributors and wholesalers who can integrate local food and farm products into their businesses when it is available seasonally.

Beyond being a sizable retail store for farm-fresh food, the WNC Farmers' Market is a collection of many small dealers, wholesalers and distributors accustomed to marketing fresh produce. With its fourteen different buildings and opportunities for large and small scale, direct sale and wholesale, and year-round marketing of farm products, the WNC Farmers' Market represents a substantial piece of infrastructure for farmers in the region who wish to sell their products locally. Future collaboration among ASAP and the WNC Farmers Market can help identify ways to use this network to bring even more locally-grown food and farm products to the region's consumers.

² This research did not measure a premium associated with locally grown food, but other research in WNC and nationally suggests that consumers are willing to pay more for local food. (See e.g., *Locally Grown Foods Strategic Positioning Research*. 2004. Research Inc.: Atlanta, GA. or Pirog, R. *Ecolabel Value Assessment: Consumer and Food Business Perceptions of Local Foods*. 2003. Leopold Center for Sustainable Agriculture: Ames, IA .