

A Market Analysis
of the
Tailgate Farmers Markets of
Buncombe and Madison Counties

Prepared for

The Appalachian Sustainable
Agriculture Project

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December 2005

Section 1: Executive Summary

Over the summers of 2003 and 2004, more than fourteen hundred surveys were conducted with customers at farmer's tailgate markets in Buncombe and Madison Counties.

The markets where customers were surveyed are:

- North Asheville Tailgate Market (NAV)
- French Broad Food Co-op Saturday Market (FBFC-S)
- French Broad Food Co-op Wednesday Market (FBFC-W)
- Tailgate Market at La Catarina Restaurant (LaC, now located at Greenlife Grocery)
- West Asheville Tailgate Market (WAV)
- Madison County Tailgate Market (MAD)
- Black Mountain Tailgate Market (BM)

This report summarizes findings about customers who shop at these markets, including per capita spending, demographic characteristics, attitudes and perceptions towards local food, and general awareness of the "buy local" campaign led by the Appalachian Sustainable Agriculture Project (ASAP). Research shows that tailgate markets in the greater Asheville area are now well-established parts of the local food distribution system, and their continued success and growth is likely.

Tailgate markets are supported by a loyal base of steady repeat customers. Based on customer counts, more than 2,000 customers shopped at these markets on any given week in the summers of 2003 and 2004. Of that number, 46% are believed to shop at the markets every week, with another 20% shopping at the markets every two weeks.

These markets have significant economic impact to the regional economy. Per capita expenditures averaged \$14.18 across both years. At the four markets located within Asheville city limits, the cumulative average weekly sales total during tracking periods in 2003 and 2004 is estimated at \$24,120. The total sales at these markets during June, July and August is estimated at over \$300,000 per year.

The markets also have significant economic impact to the specific communities where they are located. At the Asheville city markets, a significant number of shoppers indicated that the markets brought them to town that day, and resulted in their doing additional shopping in the area. These shoppers spent an additional \$14,740 at other businesses in the area on a weekly average. This represents \$191,620 in additional economic activity for the city of Asheville during the summer months.

These markets are growing in customer support. Per capita expenditures increased from \$13.41 in 2003 to \$15.01 in 2004, a 12% annual increase. Customers purchasing over \$20 accounted for 37.6% of all dollars spent in 2003 and increased to 55.4% of all dollars spent in 2004. The percentage of weekly shoppers spending more than \$20 at the markets increased from 24% in 2003 to 36% in 2004. Across all markets, on any given day 17.7%

of shoppers were visiting the market for the first time. From 2003 to 2004, the number of first-time shoppers at Asheville city markets increased from 15% of total shoppers to 19.9% of total shoppers, a nearly 25% increase.

Tailgate market shoppers are well aware of the local food marketing efforts headed by ASAP. Survey responses tend to infer that ASAP efforts have led to a greater awareness of local food issues and have resulted in increased spending on local food. Results show a very high recognition of the Local Food Guide at 65.8% across both years. From 2003 to 2004, market shopper awareness of the Local Food Guide rose from 62.3% to 71.5%.

Among those familiar with the Guide, 53.4% of respondents said they had used it to find local food or farms. 14% of those familiar with the Guide had used the web-based version of the Guide, and 88% of those respondents said they had used the Guide to find local food or farms. Of those who had seen or heard anything about locally-grown food in the past year, 55.7% said it had resulted in their increasing purchases of locally-grown food.

91.3% of tailgate shoppers said they had seen or heard about locally-grown food in the past year. The Local Food Guide, bumper stickers, and the Mountain Xpress weekly newspaper were the most well-known sources of information on locally-grown food.

When asked what they liked most about the markets, customers overwhelmingly indicated that they enjoy the markets as community social events. In addition to enjoying the products offered, customers said they like meeting friends, supporting local farmers, and listening to live music.

Some of the most important findings of this research include the following:

- 1) Tailgate markets are successful primarily due to loyal repeat customers.
- 2) A relatively high percentage of first-time shoppers come to the market each week.
- 3) The majority of shoppers at any one market live within five miles of that market.
- 4) Market shoppers get most of their information about markets through personal contacts, local print media, and passing by.

A few basic marketing strategies seem apparent from these findings, as follows:

- 1) Marketing should strive to increase per capita expenditures among the customer base that is already aware of the markets and what they have to offer.
- 2) Marketing should also strive to increase frequency of attendance from those shoppers who may only occasionally come to the market.
- 3) Concentrated non-traditional marketing in the immediate areas around markets may serve to increase market attendance and introduce new buyers to the market experience.
- 4) Over 60% of tailgate market shoppers are women. Advertising and outreach that specifically targets women may pay off better than marketing towards men.

Section 2: Introduction

Appalachian Sustainable Agriculture Project (ASAP) is a non-profit organization that supports farmers and rural communities in the mountains of western North Carolina and the southern Appalachians. ASAP's mission is to create and expand regional community-based and integrated food systems that are locally owned and controlled, environmentally sound, economically viable and health-promoting. Their vision is a future food system throughout the mountains of North Carolina and the southern Appalachians that provides a safe and nutritious food supply for all segments of society; that is produced, marketed and distributed in a manner that enhances human and environmental health; and that adds economic and social value to rural and urban communities.

Over the summers of 2003 and 2004, ASAP staff, with support from the Mountain Tailgate Market Association (MTMA) and the Center for Assessment and Research Alliances at Mars Hill College (CARA) conducted surveys of customers at six farmer's tailgate markets in Buncombe and Madison Counties. A total of 694 valid written customer surveys were gathered in 2003 and 2004. In addition, 732 rapid-response "dot surveys" were conducted in 2003 at six markets to gauge effective marketing strategies and customer habits.

Using data gathered from customer survey responses, this report summarizes findings on economic impact of the markets cumulatively, including per capita spending of customers, demographic characteristics of customers, customer attitudes and perceptions towards local food, and general awareness and economic impact among tailgate market customers of the "buy local" campaign led by ASAP during that time. Comparisons between markets and between 2003 and 2004 findings are included.

Data from seven markets are studied for this report, reflecting differences in market size, length of establishment, and geographical distribution. These markets are:

- North Asheville Tailgate Market (NAV)
- French Broad Food Co-op Saturday Market (FBFC-S)
- French Broad Food Co-op Wednesday Market (FBFC-W)
- Tailgate Market at La Catarina Restaurant (LaC, now located at Greenlife Grocery)
- West Asheville Tailgate Market (WAV)
- Madison County Tailgate Market (MAD)
- The Black Mountain Tailgate Market (BM)

The Madison County Market was only surveyed in 2003, and the La Catarina Market was only surveyed in 2004. The Black Mountain Market was only surveyed using rapid response dot surveys in 2003. Results from these markets are not included in year-to-year data comparisons.

Section 3: A Brief History of Tailgate Markets in the Region

Tailgate markets are an outgrowth of roadside produce stands. Even today, in summer months one can often find individual farmers, hobbyist gardeners, or resellers parked on the side of a country road, usually with a crude wooden or cardboard sign advertising availability of fresh produce such as corn, tomatoes and squash. The tailgate market is an expansion of that theme, where multiple producers congregate to sell their produce. Early 20th Century tailgate markets were ad hoc affairs where farmers congregated for company while spending a Saturday morning or Wednesday afternoon waiting for customers to stop and buy. Vendors discovered that by pooling their produce for sale at one location, more customers stopped regularly to buy more individually due to a steady availability and increased variety of produce for sale. The increased traffic more than outweighed the presence of potential competitor vendors.

In the 1970s, farmer's markets of all types began to grow nation-wide.¹ Farmer's markets of all types increased from 342 in 1970 to 1,890 in 1989. The 2004 Directory of Farmers Markets listed 3,700 farmer's markets of all types.

In 1979, two Asheville area farmers, Ron Ainspan and Ernie Thurston, attended a statewide meeting hosted by the North Carolina Agricultural Marketing Project to learn how to set up tailgate markets. They established the first modern tailgate market in Asheville on July 18, 1980, with 10 vendors at the Westgate Shopping Center in West Asheville. Shortly thereafter the market moved to Merrimon Avenue and became the North Asheville Tailgate Market. In 2000 the market moved to its current location on a paved lot behind the Asheville Pizza and Brewing Company.

In the 1980s and 1990s, as the North Asheville Tailgate Market grew in popularity, and as more farmers became interested in tailgate sales, other markets were formed. The French Broad Food Co-op supported the development of markets in its parking lot on Saturday mornings and Wednesday afternoons. Additional markets in the area have now been established in Buncombe County communities of Black Mountain, Weaverville and West Asheville, in Madison County in Mars Hill, and in Yancey County in Burnsville. ASAP's Local Food Guide now lists 35 tailgate markets in 24 counties in western North Carolina.

In 2002, ASAP led efforts to establish the Mountain Tailgate Market Association (MTMA), an organization originally made up of 9 farmer and vendor only markets in Buncombe and Madison Counties. Through direct grant support from the Southern Region Sustainable Agriculture Research and Education Program (SARE) and through ASAP support from the USDA and the North Carolina Tobacco Trust Fund, the MTMA has developed marketing campaigns, logos, professional signage, and professional research and analysis to develop increased economic opportunities for the approximately 150 vendors that participate in MTMA tailgate markets.

¹ Information on tailgate market history is gathered from the Asheville Citizen-Times article of August 17, 2005, "For 25 years, farmers and neighbors have gathered at the North Asheville Tailgate Market," by Arnold Wengrow.

Section 4: Customer Survey Methodology and Analysis

694 valid written surveys were administered in 2003 and 2004 at six tailgate markets. Slight variations were made among survey instruments in 2003, with additional questions included in the 2004 survey. Surveyors were instructed to note the year, month, market location, and weather conditions for each administration. The following questions were asked in surveys for both 2003 and 2004:

- How did you find out about this market?
- How many miles away from the market do you live?
- How often do you shop at this market?
- Do you also shop at other tailgate markets? If so, where?
- How much money did you, or will you, spend today at the market?
- Is the farmer's tailgate market the primary reason you came into town today?
- Do you plan to do any additional shopping in the area today? If so, how much will you spend?
- Are you familiar with either of the following guides? Local Food Guide, published by the Appalachian Sustainable Agriculture Project (**asked in 2003 and 2004**), and Farms, Gardens, and Countryside Trails of Western North Carolina, published by HandMade in America (**asked in 2003 only**)?
- What would you do to improve the market?
- What do you like best about the market?

In 2004, the sex of respondents was noted by the surveyors. The following additional questions were included in 2004 surveys:

- What local media sources do you consult most often?
- Have you seen or heard anything about locally-grown food in the past year? If so, where? Has it increased your purchases of locally-grown food? If so, can you estimate what percentage it has increased?
- What is your biggest barrier to purchasing locally-grown food?
- Are you familiar with the Local Food Guide (**asked in 2003 and 2004**)? 2004 only follow-up questions were: Have you used it to find local food or farms? Have you used the web version of the Guide?
- Is local food an important consideration when you choose a restaurant or grocery store?

In addition to written customer surveys, 732 rapid-response "dot surveys" were conducted in 2003 at six markets. These surveys were administered using large flip charts posing five questions. For each question, tailgate customers were asked to place a dot sticker in the response category that they most agreed with. The questions asked were:

- Of the promotions you have seen or heard for tailgate markets, which is most memorable?
- How did you first find out about this market?
- How much did you, or will you, spend at the market today?
- How many miles away from this market do you live?
- How often do you shop at this tailgate market?

Finally, ASAP staff conducted customer counts at tailgate markets to arrive at a valid estimate of the total number of people that shopped on selected days in May, June, and July, 2003 and in July and August, 2004. This process involved getting an accurate and complete arrival count of customers for a ten-minute period during every hour of the given market's operation. Multiplying each-ten minute count by six gave a reasonable estimate of the number of customers arriving at the market during that given hour. According to ASAP staff, comparisons between the ten-minute count method and counting all shoppers in a full hour consistently showed the ten-minute method to be accurate within 5% of the true count. Cumulative figures for all hours of operation arrived at an estimate of total customer attendance for the entire day.

Survey results were analyzed to address six broad subject areas:

- 1) What are the economic impacts of tailgate markets in the region, and how do they impact other economic activity in the area?
- 2) What are key demographic characteristics of tailgate market customers and how do they affect buying habits at tailgate markets?
- 3) How aware are tailgate market customers of ASAP's "buy local" campaign and how has that campaign impacted sales at tailgate markets?
- 4) What factors are important among tailgate customers when buying local food?
- 5) What media sources are most effective in informing buyers of the local food option?
- 6) What marketing strategies will be most beneficial to increasing sales at tailgate markets in the future?

Aggregate data from 2003 is gathered from a sufficiently large sample population of tailgate customers to meet a margin of error within plus or minus five percent, with a 95% confidence level. Sub-category analysis and results from 2004 have higher margins of error due to limited sampling. While statistical validity of some responses is questionable, data serves as a clear guide on market behavior to sufficiently inform decision makers for future marketing efforts.

Section 5: Economic Impacts of the Tailgate Markets

The key written survey questions asked for this category were:

- How much money did you, or will you, spend today at the market?
- Is the farmer’s tailgate market the primary reason you came into town today?
- Do you plan to do any additional shopping in the area today? If so, how much will you spend?

Results from the questions above are correlated to total customer attendance, using the customer count methodology explained in Section 4 above, Customer Survey Methodology and Analysis. Analyzing customer counts at BM, FBFC-S, FBFC-W, MAD, NAV, and WAV, more than 2,000 customers frequented these markets on any given week in the summer months of 2003 and 2004.

Per Capita Expenditures

Two sets of data give guidance on how much tailgate market customers spend. The written surveys administered over 2003 and 2004 received 666 responses to the question regarding how much the customer spent:

Fig 5.1 How much money did you, or will you, spend today at the market?

	Frequency	Valid Percent
\$0-5	99	14.9
\$6-10	185	27.9
\$11-15	112	17.0
\$16-20	123	18.5
\$21-30	105	15.8
\$31-40	20	3.0
\$40+	20	3.0
Total	664	100.0

The rapid response dot surveys administered in 2003 received 728 responses to the same question, but with different expenditure categories and at different markets. Expenditure categories for dot surveys were in ten-dollar increments as opposed to five-dollar increments with written surveys. When analyzed by individual markets, dot survey responses closely matched written survey responses in all but a few instances which will be discussed in sections on individual markets.

Using the written surveys for all markets across both years, the estimated per capita customer expenditure is \$14.18. This figure was arrived at by multiplying the valid percentages of each dollar range category in Figure 5.1 above by the midpoint average of each dollar category as follows:

Fig 5.2 Determining Per Capita Expenditures

\$ Category Average	X	Number of total Respondents	=	
\$2.5	X	99	=	247.5
\$7.5	X	185	=	1387.5
\$12.5	X	112	=	1400
\$17.5	X	123	=	2152.5
\$25	X	105	=	2625
\$35	X	20	=	700
\$45	X	20		900
Total		664		9412.5

For the highest dollar category of \$40+, a conservative estimate of \$45 for an average expenditure was used. Dividing the total in the right hand column by the total of 664 respondents arrives at a per capita rounded expenditure of \$14.18.

In terms of purchases, the most significant category of shoppers was those spending in the \$20 to \$30 range, representing 27.9% of all dollars spent. All customers spending more than \$20 at the markets represented only 21.8% of the entire number of shoppers. However, their purchases represented 44.8% of total dollars spent.

Fig 5.3 Percentage of customers by purchasing amounts

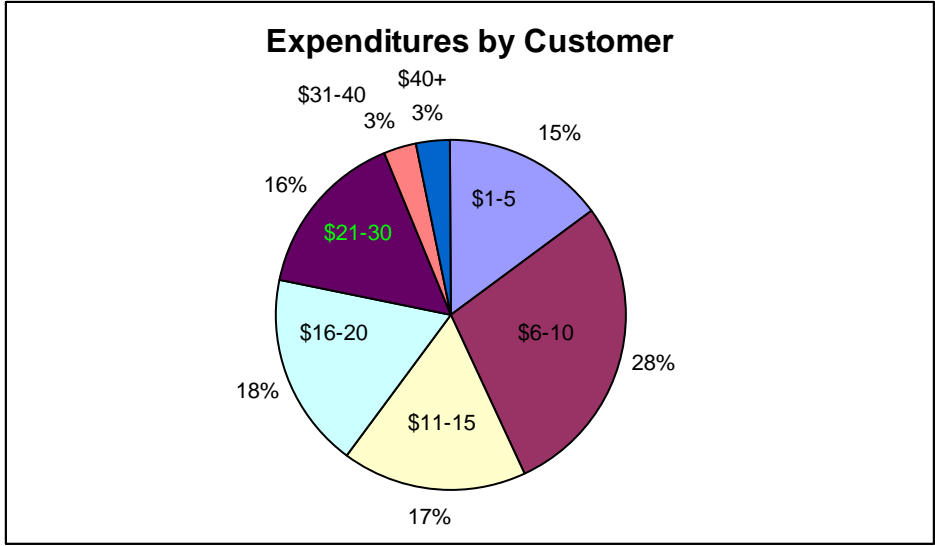
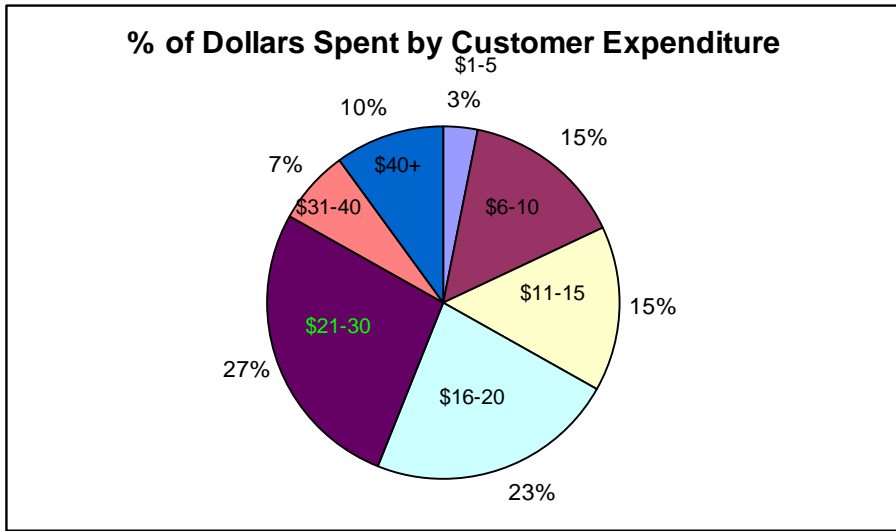


Fig 5.4 Percentage of dollars spent by customer expenditure



2003 vs. 2004 Sales Values

For cross-year comparisons, only those markets that were surveyed both years were included in the data, which were WAV, NAV, FBFC-W, and FBFC-S. In comparing purchasing data between years, a significant increase in per capita expenditures was found from 2003 to 2004.

Fig 5.5 How much money did you, or will you, spend today at the market? * 2003 vs. 2004

			year	
How much money did you, or will you, spend today at the market?			2004	2003
	\$0-5	% within year	18.7%	14.2%
	\$6-10	% within year	23.7%	28.9%
	\$11-15	% within year	13.2%	19.2%
	\$16-20	% within year	16.0%	19.7%
	\$21-30	% within year	20.5%	13.9%
	\$31-40	% within year	2.7%	2.8%
	\$40+	% within year	5.0%	1.3%
Total			100.0%	100.0%

Purchasing comparisons from 2003 to 2004 clearly demonstrate increased per capita economic activity. While the percentage of customers purchasing \$10 or less remained almost constant, those purchasing more than \$20 increased from 18% to 29%, and those purchasing in the \$11 to \$20 range fell from 39% to 29%. This may indicate that buyers in this mid-range category in 2003 became increasingly willing to spend more than \$20 the following year. In addition, the percentage increase of shoppers spending \$5 or less may be due to a larger number of first-time shoppers at the markets in 2004, as will be shown in Section 6 below.

Using the formula in Fig 5.2 above on an annual basis, per capita purchases increased from \$13.41 in 2003 to \$15.01 in 2004, a 12% annual increase.

Customers purchasing over \$20 accounted for 37.6% of all dollars spent in 2003 and increased to 55.4% of all dollars spent in 2004. For both years, the single largest category of purchases in terms of all dollars spent was in the \$20 to \$30 range. However, that category rose from 26% of all dollars spent in 2003 to 34% in 2004.

At the highest end of the purchasing spectrum, buyers spending more than \$40 at the market rose from 1% to 5% of the total number of buyers in each year. In dollar figures this category represented 4% of total dollars spent in 2003; in 2004 that rose to 15%.

Economic Activity, July 9-19 2003

In 2003 ASAP staff used a rapid response survey method to estimate the total number of customers shopping at certain markets. An estimated number of shoppers were determined for a full day in July at WAV, FBFC-S, FBFC-W, and NAV. Using cross tabulations of customer survey responses about expenditures at each market on the same days, the following economic activity was measured:

Fig 5.6 Market Economic Activity, July 9-19, 2003

Market/Date	Customers	Avg. Customer Expenditure	Total Market Expenditure	# of Vendors	Vendor Average Sales
WAV 7/9/03	280	\$11.87	\$ 3,323.60	14	\$237.40
FBFC-S 7/12/03	366	\$13.32	\$ 4,875.12	10	\$487.50
FBFC-W 7/15/03	528	\$10.67	\$ 5,633.76	15	\$375.58

NAV 7/19/03	720	\$15.74	\$11,332.80	27*	\$419.73
Totals	1894	\$13.29	\$25,165.28	66	\$381.29

Note: 245 actual customers were surveyed during this time, with a cumulative sampling margin of error of plus or minus 6%.

* Estimate

Economic Activity, July 21-July 31, 2004

In 2004 ASAP staff again used a rapid response survey method to estimate the total number of customers shopping at certain markets. An estimated number of shoppers were determined for full market days in July at WAV, FBFC-S, NAV, and at FBFC-W. Using the same methodology as in Fig 5.6 above, the following economic activity was measured:

Fig 5.7 Market Economic Activity, July 21-31, 2004

Market/Date	Customers	Avg. Customer Expenditure	Total Market Expenditure	# of Vendors	Vendor Average Sales
WAV 7/28/04	258	\$11.78	\$ 3,039.24	8	\$379.90
FBFC-S 7/31/04	293	\$15.67	\$ 4,591.31	11	\$417.39
FBFC-W 7/21/04	384	\$13.63	\$ 5,233.92	18	\$290.77
NAV 7/24/04	640	\$15.90	\$10,207.80	27	\$378.06
Totals	1577	\$14.63	\$23,072.27	64	\$360.50

Note: 154 actual customers were surveyed during this time, with a sampling margin of error across all markets of plus or minus 7.5%.

Across these four markets, per capita customer expenditures rose \$1.36, or just over 10%. However, customer counts were lower in 2004 by 17%. This may indicate a difference in shopping patterns between the first and second halves of the month. Many shoppers tend to be freer with their dollars early in the month if they have jobs paying on a month-to-month basis.

The cumulative average weekly sales total at these four markets during the tracking periods in 2003 and 2004 is estimated at \$24,120. Using this figure as a weekly average, the total sales at these markets during June, July and August is estimated at over \$300,000 per year.

Ancillary Economic Impacts

Tailgate customers were queried about whether the markets were their primary reasons for coming to town that day, whether they would do additional shopping elsewhere in the area, and if so how much they expected to spend. Using these responses, we attempt to draw some conclusions on how much ancillary economic impact the markets contribute to the region.

65.5% of all survey respondents said the market was their primary reason for coming to town.

Fig 5.8 Is the farmers' tailgate market the primary reason you came into town today?

		Frequency	Valid Percent
Valid	Yes	438	65.5
	No	231	34.5
	Total	669	100.0

57.8% of respondents said they planned to do additional shopping in the area that day:

Fig 5.9 Do you plan to do any additional shopping in the area today?

		Frequency	Valid Percent
Valid	Yes	369	57.8
	No	269	42.2
	Total	638	100.0

Over 30% of those planning to do additional shopping the area expected to spend more than \$40:

Fig 5.10 If so, how much will you spend?

	Frequency	Valid Percent
\$0	1	.3
\$0-5	37	12.2
\$6-10	52	17.2
\$11-15	19	6.3
\$16-20	36	11.9
\$21-30	48	15.8
\$31-40	18	5.9
\$40+	92	30.4
Total	303	100.0

34% of all survey respondents said that the market was both their primary reason for coming to town that day and they intended to do additional shopping in the area. From Figure 5.11 below and using the weighted mean of each expenditure category as per calculations above, the estimated per capita expenditure of this group of respondents at locations near the market is \$22.89. When applied to the 2003 market customer count of July 9-19, shoppers at Asheville tailgate markets who, had the market not been open, might not otherwise have shopped in the area that day, spent an additional \$14,740 at other businesses in the area. If taken as an average weekly expenditure for June, July and August, this represents \$191,620 in additional economic activity for the city of Asheville during that three month period.

Fig 5.11 If so, how much will you spend? Do you plan to do any additional shopping in the area today? Is the farmers' tailgate market the primary reason you came into town today? Crosstabulation

Is the farmers' tailgate market the primary reason you came into town today?	Additional Area Shopping Planned	% Response
Yes	\$0	.5%
	\$0-5	13.0%
	\$6-10	18.1%
	\$11-15	6.7%
	\$16-2	13.0%
	\$21-30	15.5%
	\$31-40	6.7%
	\$40+	26.4%

Section 6: Characteristics of Tailgate Market Customers

Limited demographic data on tailgate market customers were gathered in the surveys. However, survey results show the following general facts:

Gender

In 2004, 65.7% of respondents were female;

Fig. 6.1 Gender

		Frequency	Valid Percent
Valid	Male	66	28.3
	Female	153	65.7
	Couple	14	6.0
	Total	233	100.0

In addition to being a numerical majority, women tended to spend more at the markets on a per capita basis. 49.2% of men spent \$10 or less at the markets, as compared to 38.8% of women. However, women and men spending more than \$20 at the markets were roughly equal, at 29.9% of women and 28.6% of men.

Fig 6.2 How much money did you, or will you, spend today at the market? Gender Crosstabulation

	Gender	
	Male	Female
\$0-5	28.6%	11.6%
\$6-10	20.6%	27.2%
\$11-15	11.1%	13.6%
\$16-20	11.1%	17.7%
\$21-30	23.8%	19.7%
\$31-40	1.6%	4.8%
\$40+	3.2%	5.4%
	100.0%	100.0%

Distance Traveled

Over both years, 65% of respondents lived five miles or less from the markets they shop. 19.2% lived more than 10 miles away from the markets they shop; 5% were visitors.

Frequency of Attendance

Of 674 respondents at all markets over both years, 46.1% shop at the market weekly. 19.9% shop at the market every 2 weeks. These findings indicate that the markets enjoy a solid core of loyal customers. 119 respondents (17.7%) were visiting the market for the first time.

Fig. 6.3 How often do you shop at this market?



A comparison of purchasing habits between first time shoppers, weekly shoppers, those who shop every other week, and those who shop monthly shows a strong correlation between regular tailgate market attendance and increased per capita expenditures (Fig 6.4 below). 28.1% of weekly shoppers spent more than \$20. Of those shopping every other week, 24.1% spent more than \$20. Among monthly shoppers the percentage was 13.4%.

Fig 6.4 How much money did you, or will you, spend today at the market? * 4. How often do you shop at this market? Crosstabulation

Dollars Spent	How often do you shop at this market?			
	First Time	Weekly	Every 2 Weeks	Once a Month
\$0-5	29.6%	9.6%	11.3%	16.4%
\$6-10	33.3%	22.4%	32.3%	34.3%
\$11-15	8.3%	18.2%	18.8%	19.4%
\$16-20	17.6%	21.8%	13.5%	16.4%
\$21-30	8.3%	20.5%	17.3%	10.4%
\$31-40	1.9%	4.0%	3.0%	1.5%
\$40+	.9%	3.6%	3.8%	1.5%
Total	100.0%	100.0%	100.0%	100.0%

2003 vs. 2004 Comparisons

A same-market comparison of shopping frequency between years shows a 4.9% increase of first-time shoppers as a percentage of all shoppers from 2003 to 2004. This probably

contributes to a decrease of weekly shoppers as a total percentage of all shoppers from 49.1% in 2003 to 44.8% in 2004.

Fig 6.5 How often do you shop at this market? 2003 vs. 2004 Same-Market Comparison

How often do you shop at this market?	year		Total
	2004	2003	Both Years
First Time	19.9%	15.0%	16.8%
Weekly	44.8%	49.1%	47.6%
Every 2 Weeks	18.6%	19.8%	19.4%
Once a Month	12.2%	8.5%	9.8%
A Couple of Times a Year	4.1%	6.8%	5.8%
% within year	100.0%	100.0%	100.0%

Weekly Shoppers

Weekly shoppers are the most economically significant demographic at the tailgate markets. When compared between the same markets over both years, 47.6% of all shoppers identified themselves as weekly shoppers. In cross-tabulation of purchasing habits, these shoppers showed a measurable increase in economic activity from 2003 to 2004:

Fig 6.6 How often do you shop at this market? How much money did you, or will you, spend today at the market? * year Crosstabulation

Year		\$0-5	\$6-10	\$11-15	\$16-20	\$21-30	\$31-40	\$40+	
2004	Weekly	11.3	18.6	14.4	19.6	24.7	6.2	5.2	100.0
2003	Weekly	9.4	23.6	20.4	22.5	19.4	3.1	1.6	100.0

The percentage of weekly shoppers spending more than \$20 at the market increased from 24% in 2003 to 36% in 2004, while those spending \$10 or less decreased from 33% in 2003 to 30% in 2004.

First Time Shoppers

First time shoppers are important for growing the markets’ consumer base. Looking at data from WAV, NAV, FBFC-S, and FBFC-W (all markets that were more than one year old when surveying began) 16.8% of all shoppers were there for the first time.

A comparison with weekly shoppers shows that first time shoppers tend to travel from farther away to shop at the markets, with 18.1% of first time shoppers being visitors to the region. Fifty-three point four percent of first time shoppers traveled more than 5 miles to come to the market, compared to 24.2% of weekly shoppers.

Fig 6.7 How often do you shop at this market? * How many miles away from the market do you live? Crosstabulation

How often do you shop at this market?	2. How many miles away from the market do you live?						Total
	0-2 Miles	3-5 Miles	6-10 Miles	11-15 Miles	16-50 Miles	Visiting	
First Time	22.4%	24.1%	22.4%	2.6%	10.3%	18.1%	100.0%
Weekly	46.1%	29.7%	12.3%	6.8%	4.5%	.6%	100.0%

First time shoppers also spent far less at the market than other groups. Figure 6.4 above shows that 62.9% of first timers spent \$10 or less at the market.

When asked how they found out about the market, first time shoppers at the four markets closely followed all other shoppers, with 64.4% of first timers hearing about the market either through word of mouth or passing by.

Shopping at Other Markets

Respondents were asked if, in addition to the market where they were interviewed, they shopped at other tailgate markets. Of all 694 survey respondents, the percentages who shopped at another identified market in this study were (by secondary markets):

Fig 6.8 What Other Markets Do You Shop At?

FBFC-S:	13.3%
FBFC-W:	15.4%
NAV:	13.3%
WAV:	8.2%
MAD:	0.7%
BM:	1.4%

Cross-tabulation of this question with individual market responses indicates a strong relationship between shoppers at the two French Broad Food Co-op Markets and the North Asheville Market. Habitual customers quite often shop at more than one of these markets.

A Note on the Weather

503 surveys were administered in weather conditions that were either sunny or partly cloudy. Cross-tabulation of purchasing habits with weather conditions indicates a difference in per capita purchasing between cloudy and sunny conditions. In cloudy conditions, 16.9% of shoppers spent more than \$20, while in sunny conditions 23.3% of shoppers spent more than \$20. In partly cloudy conditions 25.4% of shoppers spent more than \$20. In only eight cases did respondents answer during rainy conditions, all of which were administered at WAV in October 2003. None of those respondents spent more than \$20.

Section 7: ASAP Marketing Efforts and Tailgate Market Consumer Attitudes Towards Local Food

2003 and 2004 surveys asked specific questions about tailgate buyers’ awareness of local food issues, media sources they consult, the ASAP marketing campaign, and the ASAP Local Food Guide.

The Local Food Guide

Results show a very high recognition of the Local Food Guide (the Guide) at 65.8% across both years. From 2003 to 2004, market shopper awareness of the Guide rose from 62.3% to 71.5%:

Fig 7.1 Are you familiar with the Local Food Guide? With Year to Year Comparison

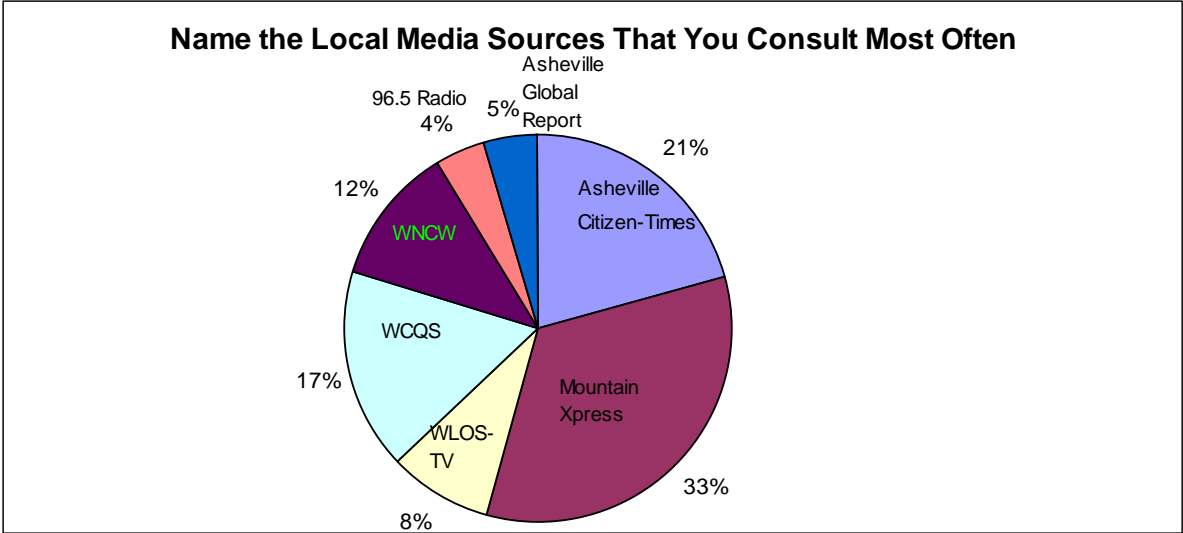
			Yes	No	
year	2004	% within year	71.5%	28.5%	100.0%
	2003	% within year	62.3%	37.7%	100.0%
Total Count All Years			65.8%	34.2%	100.0%

Among those familiar with the Guide, 53.4% of respondents said they had used it to find local food or farms. 14% of those familiar with the Guide had used the web-based version of it, and 88% of those respondents said they had used the Guide to find local food or farms.

Media Sources

Respondents were asked, “Name the local media sources that you consult most often, and be specific.” 289 respondents answered with at least one identified media sources as follows:

Fig 7.2 Name the local media sources that you consult most often, and be specific.



The Mountain Xpress and the Asheville Citizen-Times combined for a total of 54% of all answers, with local radio station WCQS pacing a distant third at 17%. Spindale’s WNCW radio registered 12% of answers. These findings bode well for advertising expenditures, as the most affordable advertising is available from some of the most often consulted sources. Television advertising on WLOS-TV, while by far the most expensive, is also one of the least consulted media outlets.

Media Awareness

Tailgate shoppers are very aware of media reports on local food. Of 254 people in 2004 who responded to the question on whether they have seen or heard anything about locally-grown food in the past year, 91.3% answered in the affirmative. Respondents were then asked where they had heard about local food with the following responses (totals exceed 100% due to multiple responses):

Fig 7.3 Have you seen or heard anything about locally-grown food in the past year? Breakdown of “yes” responses

News:		68 or 26.8%
<u>Break-out of above category (percentages are of total responses)</u>		
	Mountain Xpress:	27 or 10.6%
	Newspapers (general):	13 or 5.1%
	News (general)	16 or 6.3%
	Citizen-Times:	6 or 2.3%
	Media (general)	3 or 1.2%
	Local Food Guide:	46 or 18.1%
	Did not specify:	39 or 15.3%

Bumper Stickers:		28 or 11%
Friends/Word of Mouth:		20 or 7.9%
French Broad Food Co-op:		20 or 7.9%
Farmers Markets:		19 or 7.5%
Advertisements:		13 or 5.1%
Earthfare:		13 or 5.1%
All Over/Everywhere:		11 or 4.3%
Internet:		7 or 2.7%
Radio:		7 or 2.7%
Farmers:		5 or 2%
TV:		3 or 1.2%
New Life Journal:		3 or 1.2%

Over 50% of responses can be attributed at some level to ASAP marketing efforts. Of 299 responses in the above categories, ASAP efforts were directly responsible for 24.7% of responses (the Local Food Guide and the bumper stickers), while ASAP marketing efforts contributed significantly to another 32.7% of response categories (news, advertisements, internet, radio, and TV).

Learning About the Market

When asked “How did you first find out about this market,” 508 individuals responded as follows:

Fig 7.4 How Did You First Find Out About This Market?

Word of Mouth	29.4%
Passing By	29.4%
French Broad Food Co-op	11.3%
Newspaper	10.6%
Can’t Remember	7.2%
Other	3.3%
Road Signs	2.4%
Local Food Guide	2.4%
Magazine	.7%
Radio/TV	.4%
Website	.3%

The findings strongly indicate that knowledge of the markets comes from unstructured, largely noncommercial sources. Only 14.4% of customers at the markets found out about them through formal media sources (newspaper, the Local Food Guide, magazines, radio/TV, the Internet), with newspapers far outperforming the others at 10.6%. Across all markets, the French Broad Food Co-op was more effective about informing customers

of the markets than newspapers. However, only 2.9% of shoppers at markets other than FBFC-S and FBFC-W indicated the co-op as where they first heard about the market.

Of those who had seen or heard anything about locally-grown food in the past year, 55.7% said it had resulted in their increasing purchases of locally-grown food. 102 respondents gave an estimate of their percentage increase in local food purchases with the following breakdown by category:

Fig. 7.5 Percentage increase in purchases of local food by shoppers who had heard about local food in the past year and who had said they increased their purchases because of it.

<u>% increase</u>	<u>% of respondents</u>
10-20	35.2%
25-40	21.5%
50%	19.6%
70-90	7.8%
100%	8.8%

Barriers to Purchasing Local Food

In 2004, 247 respondents replied to the open-ended question, “What is your biggest barrier to purchasing locally-grown food?” Barriers mentioned most often had to do with access, availability, and market hours. Specific percentages were as follows:

Fig. 7.6 What is your biggest barrier to purchasing locally-grown food?

Access & Availability:	24.7%
No barrier:	23.5%
Price:	20.6%
Convenience	9.3%
Market Hours:	7.2%

There was substantial overlap with multiple responses on the issues of access, availability, convenience, and market hours. Several respondents also said that most grocery stores don’t carry local food, and that having the market only once per week was a limiting factor. Many also said that the limited growing season was a barrier to buying more local food in the off-season.

In 2004 customers were also asked if local food was a consideration when choosing a restaurant or a grocery store. An overwhelming majority said yes.

Fig 7.7 Is local food an important consideration when you choose a restaurant or grocery store?

		Frequency	Valid Percent
Valid	Yes	215	85.3

	No	37	14.7
	Total	252	100.0

Section 8: Recommendations for Future Action

Survey respondents were asked two questions that can help inform market organizers on improving the tailgate market experience:

- What would you do to improve the market?
- What do you like best about the market?

Across all markets, respondents overwhelmingly stated that they enjoy the sense of community present at the markets, as well as their ability to support local producers when shopping there. For improving the markets, many respondents recommended increasing the number of vendors and variety of products, improving availability of parking, and increasing road signage.

Marketing Recommendations

To increase economic activity and opportunity at the markets, ASAP and the MTMA may consider some of the following key factors:

- **Tailgate markets are successful primarily due to loyal repeat customers.** Weekly and bi-weekly shoppers are responsible for well over 50% of all dollars spent at the market. The more frequently a customer shops at the market, the more they tend to spend on each visit.
- **A relatively high percentage of first-time shoppers come to the market each week.** While these customers do not tend to spend very much as first time shoppers, research indicates that they will steadily increase per capita expenditures if they continue to come back.
- **The majority of shoppers at any one market live within five miles of that**

- market.** Tailgate markets are neighborhood community events; their role as a neighborhood social venue likely adds to the shopping experience.
- **Market shoppers get most of their information about markets through personal contacts, local print media, and passing by.** Advertising efforts should be tailored to meet the largely informal information networks that market shoppers rely on.

A few basic marketing strategies seem apparent from these findings, as follows:

- 1) Marketing should strive to increase per capita expenditures among the customer base that is already aware of the markets and what they have to offer. Comparisons of 2003 and 2004 data strongly suggest that frequent shoppers increased per capita expenditures, with many buyers moving from per capita spending in the \$16 to \$20 range to over \$20 per visit. Market organizers and ASAP may want to consider “frequent buyer” promotions that offer discounts or rebates to shoppers spending more than \$20 on a visit;
- 2) Marketing should also strive to increase frequency of attendance from those shoppers who may only occasionally come to the market. Again, the more often buyers shop, the more they tend to spend on each visit. The same marketing suggestions above may also help to increase regular attendance;
- 3) Concentrated non-traditional marketing in the immediate areas around markets may serve to increase market attendance and introduce new buyers to the market experience. Increased signage and road visibility may be a cost-effective way of bringing in more shoppers. Door-to-door leafleting in market neighborhoods may also increase turnout. Getting shoppers signed up on an email distribution may provide a sort of electronic “word of mouth” to alert shoppers to special events at the markets. This can be accomplished by having tailgate market gift certificates available in a drawing, with registrants required to provide their email addresses.
- 4) Over 60% of tailgate market shoppers are women. Advertising and outreach that specifically targets women may pay off better than marketing towards men.

Future Research Recommendations

Tailgate markets will be well-served if customer survey work continues annually or every other year. In addition to the survey questions asked in 2004, ASAP may want to consider the following additional questions:

- 1) What is your age range? (15-25, 25-30, 30-40, etc.)
- 2) How many people live in your home?
- 3) How long have you lived in the Asheville area? (0-2 years, 3-5 years, 6-10 years, 10+ years)
- 4) Do you personally know a farmer or farmers selling at this market?
- 5) Are you familiar with ASAP, the Appalachian Sustainable Agriculture Project?
- 6) Compared to one year ago, do you buy more, less, or about the same amount of locally-grown food?
- 7) Thinking about all sources of local foods (co-ops, supermarkets, tailgate markets, restaurants, etc.), about how much do you spend per week on locally-grown food?

- 8) Is this market location convenient for your shopping needs?
- 9) When was the first time you shopped at an area tailgate market? (Name the year)
- 10) Could we contact you by email with more information about the market? (ask for email address).

Conclusion

This research strongly suggests that the tailgate markets have significant economic impact in the communities where they are located. Farmers benefit from direct retail market sales in environments that draw several hundred customers in a short period of time. Consumers are connected to the local supplies of fresh produce that they desire and are actively involved in supporting local farms. Many customers come to town with the main purpose of shopping at the markets, and go on to spend many more dollars in the surrounding neighborhood.

Tailgate market shoppers are well-aware of the local food marketing efforts headed by ASAP. Survey responses tend to infer that ASAP efforts have led to a greater awareness of local food issues and have resulted in increased spending on local food.

In sum, the tailgate markets of the greater Asheville area are now well-established parts of the local food distribution system, and their continued success and growth is likely.