Greenbelt Farmers' Market Network

2010 Shopper Study

January 2011

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Wherever food markets survive, they bring a quality to urban life that is all too rare in the West: a sense of belonging, engagement, character. They connect us to an ancient sort of public life. People have always come to markets in order to socialize as well as to buy food, and the need for such spaces in which to mingle is as great now as it ever has been – arguably greater, since so few such opportunities exist in modern life.

Hungry City – How Food Shapes our Lives, Carolyn Steele

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Executive Overview

Introduction

Greenbelt Farmers' Market Network (GBFMN) commissioned this study funded by the Friends of the Greenbelt Foundation. A total of 339 shoppers at farmers' markets located in and around the Greenbelt participated in an online survey. Invitations to take part in the study were distributed at approximately 30 farmers' markets in October to early November 2010; the incentive was to provide feedback and a chance to win $100 worth of market dollars at their favourite market.

The margin of error for 339 interviews is +/- 5.5%. The primary focus of the interview was their last trip to the market and experiences at markets within the past 12 months. It should be noted that these results are based on shoppers who made the effort to log on to the survey. As such, the sample is self selected and may not reflect a full range of shoppers.

Key Learning Points

- Two-thirds of shoppers are the main grocery purchasing agents for their household; the remainder play a minor or supplementary role. While shoppers primarily come to markets to buy food and many are drawn to buy one particular item, study participants also indicated that they come to markets for others reasons. The trip to their local farmers' market provides a welcome outing where they meet friends and neighbours, grab a snack or prepared food to eat at home, learn about seasonal crops, chat about where the food is grown, stroll through the array of vendors.

- While the popularity of farmers' market items varies depending on the shopper, vegetables holds the top spot, followed by fruit, baking/bread, cheese, meat, snacks and prepared food. Other items fill out the array and draw some shoppers: eggs, cut flowers, honey, herbs, coffee/tea, maple syrup, plants/seeds.

- The average amount spent per customer is $40.10, and the range spans from under $10 to $70 or more. The bulk of shoppers − 74% in total − spent between $20 and $59.99 on their last visit to the market. Shoppers who come to markets to buy their groceries make up the majority and spend more money than those who drop in for one or two items.

- On average, study participants have been shopping at markets for 7.6 years. This average includes half of shoppers who are longer term market 'loyalists' and half are who are 'new recruits,' having developed the market habit in the last five years.

- Market shoppers have varying degrees of loyalty, with the prime group, 67% of shoppers, attending each week or more frequently. The remainder tend to be recent converts and come less frequently.

- Most market shoppers in the Greenbelt area are well served with two or more markets close at hand. This translates into less car usage – only half come by car while most of the remainder walk and a small number get there by bike or mass transit. High frequency, 'Big' spending shoppers tend to have more markets to choose from than those who spend less and attend markets less often.

- Market shoppers are full of praise for farmers' markets, listing an abundance of benefits starting with food and touching on much, much more. Markets not only provide access to fresh, tasty, local and sometimes organic food, but they provide revenue direct to farmers, contribute to the rural economy and are a venue for friendships and community building. The perceived blessings of markets vary depending on the length of time shoppers have been sourcing food from markets. Appreciation of markets deepens over time.

- Most farmers' market shoppers also admit that markets are not without fault. The major market weaknesses are the limited hours/days of operation/seasonality, the higher prices compared to supermarkets and, to a lesser extent, 'out of stock' situations. Shoppers at smaller markets complained of limited options and others found that the parking was limited.

- The lion's share of farmers' market shoppers are seeking out and buying local food well beyond supermarkets including about half of shoppers who indicated they go to independent grocery stores: 40% go to on-farm markets, 29% turn to pick-your-own farms, and 11% are involved with CSA's.

- Shoppers indicated that markets have a myriad of opportunities to deepen relationships and enhance customer benefits. This includes expanding the availability and array of organic food, providing more information about farms and how produce is grown, featuring cooking guides using market food, and strengthening education on the benefits of buying local, seasonal food.

- Farmers' market shoppers indicate that their market 'habit' has had profound impacts, altering their attitudes and behaviour. It has positively affected what they cook and consume, what they know about food and how it is grown and how they define 'healthy, fresh food.' It has also translated into one in four shoppers sharing more meals with family/household members.

- Most market shoppers believe that farmers' markets are here to stay. Their permanence is a function of the perceived increasing popularity of accessing food via this expanding distribution channel; more and more people are turning to markets for local food and the unique market community connected experience. Markets are satisfying the increased interest in buying local, fresh, tasty food. Also, a substantial proportion of shoppers are propelled by the desire to support the local farm economy, sourcing 'real' food that is authentically local and, for some, to increase the presence of organic food in their diet.

- Communicating and reaching shoppers involves addressing the digital divide – older shoppers turn to ads/articles in local newspapers, posters etc. while younger shoppers look for news online (enewsletter, website, Facebook and other social media).

Conclusions & Recommended Actions

- Farmers' markets are mainly attracting serious shoppers. Two in three shoppers who took part in the study are there to replenish food supplies, drawing from a wide range of items including seasonal fruit and vegetables, bread/baking, cheese, meat, eggs and, for some, cut flowers, plants, snacks, and ready to eat and value added items for home.

- Farmers' markets are about accessing food that is local, fresh from the farm, tasty and linked to the people who grow/produce it. But they are also much, much more. They stand out in stark contrast to supermarket shopping which can be a rote, disciplined, 'get it done as fast as you can' experience that involves navigating the aisles of large stores and scanning thousands of options. In contrast, shoppers told us that they view markets as a leisurely, welcome outing, an opportunity for chance encounters with friends and neighbours, a venue for learning what's in season and how it was grown, 'touching' the earth via exchanges with farmers, getting cooking advice and being inspired to try new items. Hence, there are several tangible and intangible drivers that beckon shoppers to markets. Many vendors not only offer valued added food but they are also adding values by filling in shoppers' mental map with an understanding of why buying local food is important.

Markets and vendors are encouraged to continue working on expanding the market learning and fun experience by inviting participation from local chefs, food educators, public health experts, local food advocacy groups, etc.

- Markets stand out in contrast to conventional grocery stores too in that they offer a wider variety of experiences and they are a source of food information right down to how food is grown. They provide background, a direct link with the food source and the producer. But the range of items available is much, much narrower and is mainly concentrated on fresh, unprocessed, unpackaged, unadulterated raw ingredients. While the value-added component at markets is limited, it is popular with some shoppers and they are calling for more options.

  Address shoppers' desire for a broader variety of both fresh items and value added, and ready to eat choices to meet today's need for some measure of convenience

- Markets are a learned experience and provide a teachable moment. Market shoppers divide into longer term and shorter term converts, mirroring the growth of farmers' markets in and around the Greenbelt since 2005 building on a base of longer term markets. The longer the history of shopping at markets, the more frequently shoppers attend and the more they spend, illustrating that shoppers tend to develop the farmers' market habit over time. It is a learned experience given that market shoppers are deviating from the supermarket norm. It takes time to adapt to the particularities of farmers markets – one day a week during limited hours, selling a limited number of options, cash only, etc. Younger shoppers appear to be willing to learn to shop with cash instead of relying on their debit and credit cards.

  Markets and vendors are encouraged to continue exploring solutions to some of the barriers that may be negatively impacting some segments of shoppers: provide large volume shoppers with assistance to carry items to their vehicles (use trained volunteers), expand young adults' cooking skills with onsite demonstrations, orient opening hours to reflect shoppers' needs, promote farm tours and on-farm markets/stores, pick-your-own, etc.

- Over time market shoppers develop a 'local' orientation as they learn about and eat locally produced food, and in the process likely become less 'nowhere/everywhere' focused as is typical of supermarket shoppers. Markets are about localizing and connecting whereas supermarkets are about branding and low prices cut loose from geographic reference points.

Strengthen onsite farm branding and farm source identification using reader friendly, attractive signage and other communication tools. Reinforce shoppers' sense of attachment to food that is locally grown and produced.

- The proportion of a household's weekly food budget spent at markets varies, but averages $40.10 per shopper. This is a healthy figure given that, according to Statistics Canada, in 2001, Ontario households spent an average of $86.97 a week for food purchased from stores and another $38.93 for restaurant/takeout food. There appear to be opportunities to expand the markets' share of the snacking/home meal replacement sales which account for about one-third of the total that households spend on food. Shoppers at farmers' markets are consciously doing their best to support local farmers and the rural economy. They do this by turning to other distribution channels and sources for local food that includes markets and beyond. A surprisingly high proportion report that they turn to independent grocery stores, 'local green grocers' (53%), on-farm markets (40%), pick-your-own farms (29%) and 11% have bought a share of the crop (CSA). In order to fully appreciate the significance of this spending pattern aimed at local and alternative distribution channels, it is worth noting that overall three major supermarket chains capture 80% of food spending.

  Both farmers and potentially local small scale chefs/caterers can expand the share of shoppers' total food expenditure both for food consumed at home and take-out options spent locally. The goal is to increase the volume of locally produced food eaten by market shoppers and their families.

- Markets celebrate food, cooking, sharing and boosting good health. Shoppers revealed that their market habits have had significant impacts on not only the amount of fresh produce that is eaten at home, but they're experimenting with new ingredients that markets have introduced them to. Almost all families eat more local food and have improved their diet. In the process, shoppers' appetite for learning more about seasonality and food growing practices has increased considerably, and one in four frequent shoppers say their family is eating more meals together, surely a sign that markets contribute to better health. There is great receptivity among shoppers for cooking tips, demonstrations and inspiration.

  Market managers and vendors have considerable opportunity to reinforce these good eating habits by providing further support as people learn or relearn the secrets of good healthy home cooking. Markets should be strengthening ties with food policy planners, food advocates and public health educators. If funding is available, the health impacts of farmers' markets should be studied and documented. This analysis is becoming increasingly important as the challenge of addressing rising levels of obesity becomes centre stage. NEW

- Market shoppers are emotionally invested in supporting their beloved market to extend availability. This includes a call for more access: extending the market season, extending hours, and adding market days during the growing season.

It is worth exploring extending the market season. In addition, given shoppers' interest in learning more about cooking, market managers could help by providing access to other methods of 'extending the season' by promoting or planning canning, preserving, freezing and dehydrating workshops. This could be arranged in tandem with community-based organizations and individuals that are already offering training. It could also prove to be beneficial to those shoppers who have limited food budgets.

- While prices did not emerge as a major barrier for the majority, they can be a barrier to increasing the amount of money that some shoppers are able to allocate to markets and could be a deterrent for those who are currently not shopping at farmers' markets. This factor was of concern to one in three shoppers in this study, while 40% of vendors indicated that they often hear complaints about market prices. Yet it is not clear whether some of the price disparity is perceptual or if some shoppers are so tightly constrained that they are forced to buy the cheapest produce, meat, bread, etc. at the expanding array of discount supermarkets.

  GBFMN is advised to gather price data from an array of markets, independent retailers and supermarket chains (discount and higher end) for comparison purposes. It is possible that this analysis will reveal that the disparity between markets is less than is perceived or only applies to certain categories.

- Connecting with market shoppers both on and offsite involves a combination of face-to-face interaction, signage (promoting the market, products and farms), local print media (newspapers) and electronic tools (email newsletters, websites, Facebook, etc.). Shoppers seek out and value a wide diversity of communication channels, demonstrating a generational divide between younger and older adults. Most market managers and vendors understand that it is critical to connect with shoppers and potential new shoppers in a variety of ways, but may be falling short of reaching the full spectrum of people. Younger adults automatically turn to electronic media (Toronto shoppers skewed younger), while older shoppers that were particularly evident in the non-Toronto locations rely on local print media.

  Strengthening the use of electronic tools offers considerable potential for both markets and vendors/farmers. Possibly, there are opportunities to work with students and young food activists to create or enhance websites, Facebook content, Twitter, etc. Some of the younger market shoppers might also be interested in creating content for Facebook and electronic newsletters. Stimulate content creation and viral linkages via market contests and challenges.

- Comparatively, market shoppers are more optimistic than vendors about the future place that farmers' markets will have in feeding urban/suburban people – 89% versus 75% say that markets are here to stay. And shoppers have many fundamental reasons for feeling positive about the prospects grounded in the superiority of locally grown food.

There is merit in conveying this supportive information to both vendors and market managers coupled with feedback about factors that would strengthen loyalty and share of the food dollar that could be captured at markets.

- The results of this survey among farmers' market shoppers provide positive insights into the impact that the market experience is having on how people view food, the range of fresh food they are eating and their openness to new locally grown items. It also poses potential challenges for some vendors to continue expanding what they are growing and selling (value-added products) and to consider adopting organic production methods. The majority of shoppers (over 70%) indicated that they are interested in buying both more organic produce and value-added items; two thirds of vendors agreed that demand for organic items has increased.

  Markets, particularly Toronto based and larger markets, are encouraged to pilot more value-added options and organic food.

- This study provides a snapshot of some shoppers. It depended on market shoppers to make an extra effort to provide their input, and as such cannot be viewed as comprehensive of all market shoppers. Possibly, some of the less loyal or smaller spending sectors were underrepresented. Nor is it able to reflect the full spectrum of shoppers at all farmers' markets in and around the Greenbelt. Results are based on a wide distribution of shoppers at markets in the following areas: 47% Toronto, 18% northeast/northwest, 15% Hamilton/Niagara Region and 13% Durham/York/Peel/Halton. Given that about one third of the region's markets are located in Toronto, the results of this study tend to skew towards this high-population location.

  Greenbelt Farmers' Market Network is encouraged is conduct a comprehensive study of all food shoppers in the area spanned by the markets. The intent would be to provide more insights into market shoppers (high and lower volume) and segments that are currently not shopping at markets. What barriers are standing in the way of non-shoppers attending markets – awareness of local options, accessibility and ease of reaching markets, perceived higher price levels of market items? What steps can be taken to bridge the key gaps? Greenbelt Farmers' Market Network is also encouraged to repeat this study one to two years in the future to provide comparative data and track progress/changes.

  In addition to conducting measurement studies, GBFMN would be wise to get to know the different segments of market shoppers better by conducting indepth research using focus groups and individual indepth interviews.

- Performance Indicators – the top three factors that could be considered as critical criteria for measuring the success of farmers' markets are:

  1. Shopper loyalty/shopping frequency – two-thirds (67%) of shoppers visit their favourite market at least once a week during the season

  2. Amount spent – on average shoppers' spend $40.10 of their food budget at the market which

represents a healthy portion of the total household food expenditure.

3. Impact on behaviour – shoppers report that markets have had a significant impact not only on what they are eating but on the amount and range of local foods that are now part of the family diet.

Other factors that could be considered as measures of success are (a) shoppers' strong belief that markets are a necessary and positive aspect of delivering locally produced food to urban and suburban residents, and (b) the reasons that they opt for markets that span other factors beyond food (community/friendship networking, learning about how food is grown and seasonal items, etc.) .

Background

Greenbelt Farmers' Market Network (GBFMN) received funding from the *Friends of the Greenbelt Foundation* to "support regional collaboration, knowledge sharing and professional development among market organizers." This allocation covers a number of proposed initiatives including conducting a primary research study among people who shop at farmers' markets located in and around the Greenbelt.

This shopper study is building on the market research study conducted in 2009/2010 among market managers and market vendors/farmers. The in-depth focus group and telephone measurement study examined the state of local farmers' markets identifying opportunities and potential barriers to growth and stability. The consumer study is GBFMN's first opportunity to obtain feedback in a systematic manner from people who visit/shop at the markets.

Study Aims

The primary intention was to provide GBFMN with data that will assist market managers to strengthen their relationships with the local community and the people who shop at the markets, and to provide benchmarks for future comparison that will aid in tracking shopper profiles and behaviour over time. The following topics were explored:

1. Identify key 'drivers'; what factors prompt people to shop at farmers' markets and satisfaction levels for each variable

2. Frequency of shopping at farmers' markets; number of markets available in close proximity to home/work

3. Purchase information: categories of food items bought (fresh and value-added) and total amount spent

4. Purchase barriers, including categories of items desired but not purchased due to a number of factors (not stocked, sold out, lack of access to ATM or credit, etc.)
5. Purchase incidence of non-food items including flowers/plants, handcrafts, etc.
6. Awareness and impact of onsite market entertainment/education and impact on overall appeal
7. Getting to the market: transportation mode and amount of time to reach destination
8. Market Promotion: awareness of local and social media, onsite signage, etc. (medium and message content)
9. Most effective way of reaching shoppers with market messages
10. Suggestions for improving the market experience at the preferred market; list of test items could be included to measure appeal of items such as cooking demonstrations, food tastings, etc.
11. Demographic information: age, gender, household size and composition, ethnicity, etc.

Study Method

An online survey was the most effective and cost efficient way of obtaining detailed and timely feedback from market shoppers. The initial contact with potential survey participants was made at farmers' markets in and around the Greenbelt; approximately 30 market managers agreed to participate in this process (See Appendix 1 for a list of participating markets). From early October to mid–November, shoppers were invited to participate in an online survey. *Give Us Your Feedback,* a colourful survey notice with the survey link, was provided as a reminder. In return for completing the online survey, participants had a chance to win $100 in market dollars to spend at their favourite farmers' market.

The online questionnaire was designed by the consultant in conjunction with GBFMN management (see Appendix 2 for a copy of the questionnaire). Although the time required to complete it varied depending on individuals, it took approximately 10 minutes.

The total sample was 339 completions for a margin of error of +/ 5.5% in 95 out of 100 cases. Most of the participants chose to take part in the draw and indicated their favourite market. Programming ensured that there was only one completed questionnaire per respondent.

Data from the completed questionnaires was then tabulated; open ended responses were coded and added to the data pool. Then a cross tabulation plan was prepared to maximize learning based on statistically viable cell sizes. It yielded statistically viable insights based on demographics (age, gender, education, household size, presence of children and country of birth), main reason for visiting the market, amount spent, number of years shopping at farmers' markets, frequency of shopping at farmers' markets, and incidence of buying local food at other types of outlets/channels.

Profile of Participants

A total of 339 farmers' market shoppers completed the online survey.

Gender:	%	Education:	%	No. People in Household	%
Female	78	Some high school	2	One	17
Male	22	Graduated high school	10	Two	43
Age:		Community college/ University	87	Three	19
Under 21	1	**Occupation:**		Four or more	22
21 - 30	12	Professional	46	**Average No.**	2.5
31 - 40	20	Retired	13	**No. of Adults**	
41 - 50	23	Manager/business owner	10	One	18
51 - 60	26	Sales/clerical	8	Two	63
61 - 70	13	Homemakers	6	Three or more	18
71 and over	4	Student	4	Average No.	2.1
Refused	1	Skilled/trades	4	**No. Children (Under 18)**	
Average age:	47.5	Unemployed	1	None	73
Born in Canada?				One	13
Yes	76			Two or more	14
No	24			Average no.	0.4

Market Shopper Segments:

- Women dominate (80% of total shoppers) and skew older – 43% are over 50 years. They tend to shop for adult only households as does the smallest sector (21 to 30 years). An equal number (43%) are 31 to 50 years and are more likely to be provisioning for a family with children.
- Market shoppers are well educated, with most (87%) having attended community college and/or university.
- Market shoppers tend to be employed in professional/managerial categories, while sales/clerical, skilled trades and other categories are under- represented in this survey.
- On average, there are 2.5 people residing in shoppers' households, with larger families skewing younger. Those who are buying for more people tend to come to markets for food and other reasons, whereas smaller size household shoppers are more likely to say they do their regular grocery shopping at their farmers' market.

- Almost three-quarters of shoppers (73%) are buying for adults only – there are no children living at home. And the minority of shoppers with children have one or two only.

- Three in four shoppers (76%) were born in Canada; the remainder were born elsewhere. They come from, in order of significance: United States, United Kingdom, Western Europe, Asia, Eastern Europe, Australia/New Zealand, and Africa. Almost two-thirds (64%) come from English speaking countries.

Area Code of Residence	%	**Location of Favourite Farmers' Market**	%	**Size of Favourite Farmers' Market**	**%**
416, 647	47	Toronto	47	1 to 9 vendors	3
905, 289	32	Northeast/Northwest	18	10 to 19 vendors	18
705	6	Hamilton/Niagara	15	20+ vendors	71
519	6	Durham/York/Peel/Halton	13		
Other	9				

Analysis Based on Market Location

The following table highlights significant differences based on the market location.

Factors	**Market Location**
Reasons for coming to the market	Toronto & Northeast/northwest markets places for community contact
Items purchased	Value-added & snacks, Cheese, snacks/prepared, coffee/tea – Toronto Apples & pears – Durham* & NE/NW Cut flowers – Durham & Hamilton/Niagara
Number of years shopped at FM	On average Toronto shoppers more recent average 6.2 years – more new shoppers Non-Toronto market shoppers have longer history
Frequency of market shopping	More Toronto shoppers go more than once a week Shoppers in other markets more likely to shop weekly
No. of Markets within easy reach	Toronto and Hamilton/Niagara Region shoppers have more options Shoppers in NE/NW much more limited – half have one only
Like about markets	Toronto shoppers strongest support for organic & "foods I can't find elsewhere'
Dislike about markets	Toronto most likely to mention cost of food Sell-out most often in NW/NE Durham/York/Peel – short season only

Other sources of local food	Durham/York/Peel – grocery stores Toronto – independent NW/NE & Hamilton/Niagara– on-farm market NW/NE – pick-your-own Toronto - CSA
Travel to market	By car – all non-Toronto markets Walk, bicycle, transit - Toronto
Perceptions/Needs	Toronto – interest in organic food, would spend more if ATM/debit, price levels more than willing to spend, want year round markets NE/NW – farmers should be selling what they produce
Impacts on Shoppers	Toronto & Hamilton/Niagara – tried cooking new foods Toronto – added more local to their diet, learned more about ag. issues
New Ideas for Markets	Toronto – live entertainment, wireless debit or ATM, picnic tables & benches Toronto & Hamilton/Niagara – broader range of products
Best Way to Reach Shoppers	Toronto – email to customers, website Non-Toronto – ads in local papers Durham/York/Peel/Halton – roadside signs
Ways to Improve Markets	Toronto – more/better selection, more organic, more ready made, more markets NW/NE – larger/more area NW/NE & Hamilton/Niagara – more vendors
Profile of Shoppers	Toronto – skew younger than elsewhere (2/3 under 51 yr.) older elsewhere, higher education levels. Household size – smaller in Toronto, Toronto more single dwellers Children – Hamilton/Niagara – highest incidence of no children/adult only, Toronto skews towards one child only Born in Canada – highest in Hamilton/Niagara, highest not born in Canada in Toronto

*Durham applies to: Durham/York/Peel Halton

While the most significant differences were noted based on the location of the market, some differences were noted based on market size. Larger markets applies to markets with 20 or more vendors.

- Appeal of Market: Larger markets more of an outing and attract more buyers of more value-added food & snacks.

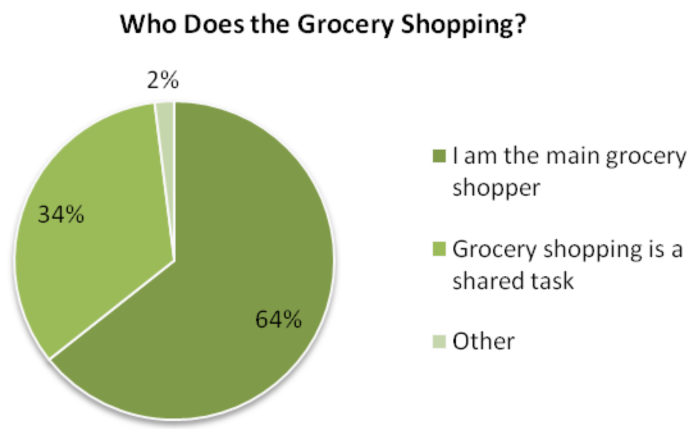
- Small to mid-size markets – more vegetables, fruit, Larger – more meat, eggs, snacks & takeaway

- 10 to 19 vendors – average $43.20 and 20+ vendors – average $40.40

Detailed Findings

Who Does the Grocery Shopping?

Greenbelt Farmers' Markets are attracting shoppers with different goals: those who are the primary grocery shopper for their household and others who share the task and/or supplement the food supply. Two-thirds (65%) of total buyers are the main shoppers – they are the dominant sector at farmers' markets; the remaining one-third (34%) augment but do not carry the primary responsibility. The only difference between these sectors is gender, with women being far more likely to have the lead role in provisioning the household. This is consistent with traditional household task allocation over the years.



Why Visit the Market?

People are drawn to markets for different reasons. The dominant segment is there primarily in search of food – two-thirds of shoppers (63%) replenish supplies and buy 'regular grocery items' which includes essential eatables. This means that shoppers may be coming for the fresh produce, especially vegetables, but also make sure that they obtain those hard-to-get locally produced items that may not be sold at the supermarket. For this segment, the entire array of fresh food is the main draw, augmented by the lure of specific things – baking, seasonal fruit, cheese, eggs, cut flowers and prepared food or snacks. A minority, 20%, indicated that they visited their favourite market to purchase a specific item.

Also, shoppers are propelled by other factors, some of which are not food related. Markets promise a welcome outing: it's a venue for seeing friends and neighbours, and while they are at it some shoppers pick up a snack or takeout meal (home meal replacement). Markets feature special events, showcase new grassroots products and provide a pick-up point for CSA's, opportunities to chat with farmers, encounters for community buzz about food, etc. They can be exciting, low key venues for building communities and spreading knowledge without the oppressive pressure to purchase that is common to most commercial venues.

Shoppers who say their main goal for visiting the market is to buy regular grocery items differ from those who have come to buy a particular thing and/or for the social aspect – the 'Big' (volume and range) shoppers versus the 'Small' (volume and range) shoppers. The table below helps see those differences.

'Big' Shoppers (63%) **Visit to Buy Regular Grocery Items**	**'Small' Shoppers (20%)** **Visit for a Specific Item/Other Reasons**
▪ Spend on average more than $40.	▪ Average expenditure lower (less than $40)
▪ Shop weekly at farmers' markets	▪ Shop at markets less often
▪ Small size household (one or two members)	▪ Larger size households
	▪ Bought a meal/snack, came for an outing or an event

Thinking about your last visit to a market, what was your main reason for visiting:	**Main Reason Total %**	**Other Reasons Total %**
I came to buy regular grocery items	**63**	**82**
I came for a specific item	**20**	**62**
I came for an outing or as a tourist	**5**	**26**
I came to buy a meal or snack to eat at the market	**3**	**28**
I came to see friends/neighbours	**2**	**32**
I came for a special event or program	-	6
Fresh food/products		**4**
Local food/products		3
Buy from/support local farmers	**-**	**3**
Organic food/produce	-	2
Meet people/talk to vendors	**-**	**2**
See what's there/shop around/get ideas	-	2
CSA pickup	**1**	**2**

Other	**7**	**5**

What are Shoppers Buying?

Study participants were asked what types of things they bought on their last visit to their local farmers' market. Over 30 different categories/items were mentioned – fresh vegetables topped the list with nine in ten stopping to buy them. The top 10 categories, based on purchases made on the last visit to the market, are:

1.	**Vegetables**	**91%**
2.	**Bread, baking**	**59**
3.	**Apples, pears**	**55**
4.	**Cheese**	**29**
5.	**Meat, beef, lamb, pork**	**29**
6.	**Snacks, prepared food to eat at market**	**25**
7.	**Berries/strawberries/blackberries**	**25**
8.	**Prepared food to take home**	**23**
9.	**Tender fruit/peaches/plums**	**22**
10.	**Eggs**	**21**

Other items/categories bought by 10 to 20% of shoppers, listed in order of popularity: cut flowers, honey, herbs, coffee/tea, maple syrup, chicken, plants/seeds, specialty meat (elk, boar, goat), crafts, jams/preserves, fish, chocolate, juices/cider, condiments, dog treats and non-food items (beauty products, soap, etc.).

Other key learning:

- 'Big' shoppers are more likely to include vegetables, fruit and meat on their shopping list and spend over $40 dollars than those who don't buy these categories.
- Vegetables are highly perishable and new items come on stream throughout the season; consequently, people stock up on a regular, weekly basis rather than occasionally.

- Families with children (under 18 years) tend to be more likely to buy some things than others, including bread/baking, cheese, snacks, and prepared food/take away items.
- Weekly shoppers buy a wider array of things than those who are not shopping at markets regularly.
- Shoppers who spent more than $40 on their last trip bought a longer list of items, not just vegetables, bread, meat, etc. but things that are more niche market such as honey, herbs, maple syrup, and plants/seeds.
- While most shoppers (76%) were born in Canada, those who were not are almost universally there to buy fresh vegetables.

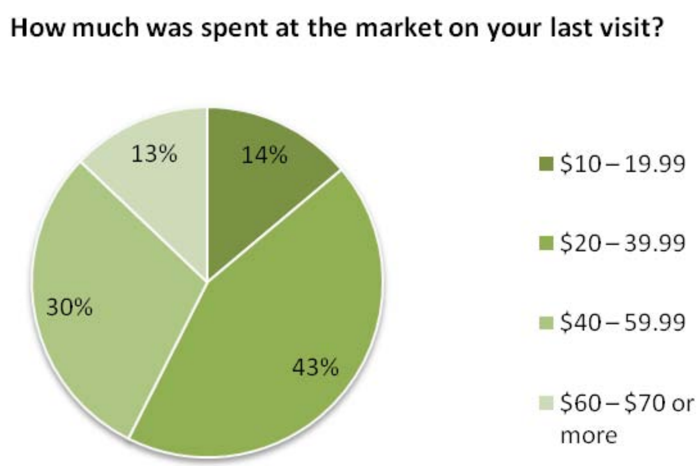
Here is a list of items, which if any did you buy on your last visit? Please select from the list below.	**Total %**		**Total %**
Vegetables	91	Maple syrup	9
Bread, baking	59	Chicken	9
Apples, pears	55	Plants/seeds	7
Cheese.	29	Specialty meat (elk, boar, goat)	6
Meat, beef, lamb, pork	29	Crafts	3
Snacks, prepared food to eat at market	25	Jams/preserves	3
Berries/strawberries/blackberries	25	Fish (any)	2
Prepared food to take home	23	Chocolate	2
Tender fruit/peaches/plums	22	Tofu	2
Eggs	21	Juices/cider	2
Cut flowers	20	Condiments/salsa	2
Honey	20	Dog treats	1
Herbs	18	Non-food item (beauty products, soap)	1
Coffee or tea	15	Other	3

How Much was Spent at the Market?

Shoppers who participated in the study indicated they spent $40.10 on average, but the individual totals ranged from under $10 (4%) to $70 or more (8%). About one in four (26%) spent $20 to $29.99, another 18% spent $30 to 39.99, 20% spent $40 to 49.99 and 22% spent $50 and over. Very few (8%) went over the $70 level.

Here are factors linked with the amount spent:

- It is a function of the shopping purpose and frequency of going to farmers' markets. The highest spenders are there to do some or a good deal of their grocery shopping and make a point of going to the market weekly– in effect, farmers' markets replace or stand side by side with supermarkets.
- Shoppers who come to the market to augment or enhance the supply accessed through other channels, likely supermarkets, spend less and likely attend less often. There is no compelling need to get to the market every week.
- There is no substantial difference between the size of the household and presence of children (or not) in terms of average amount spend at the market.



Small Budget Spenders

The small proportion, 14% of study participants, who spent under $20 were asked why they did not purchase more of their weekly groceries at the market. Two major factors emerged: they did not need anything else and prices levels were beyond their budget (or available cash). A slew of other factors contributed to modest purchasing, lead by lack of availability and followed at some distance by time pressures, inclement weather and lack of convenience.

If you made few/no purchases, what are the reasons for not buying more of your weekly groceries at the farmers' market?

Base: Spent less than $20	Total %
Found what I wanted/didn't need anything else	35
Prices higher than I wanted to spend	26
Couldn't find what I wanted	13
Not enough money/no cash	7
Not enough time/no time	7
Weather conditions not conducive to shopping	4
Not convenient enough	4
Too hard to carry it home	2
Other	11

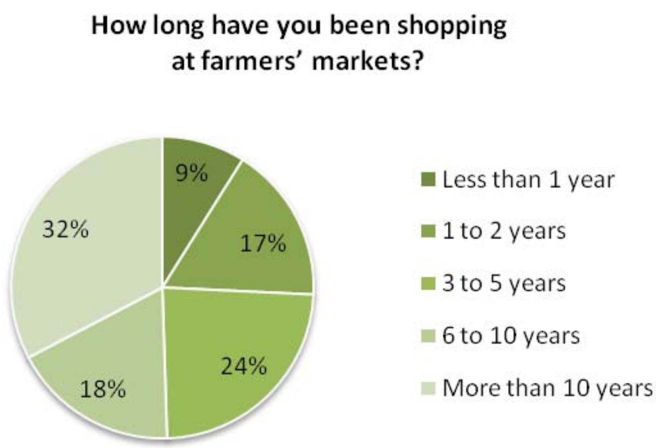
History of Shopping at Farmers' Markets

The network of farmers' markets in the Greenbelt and beyond has expanded dramatically in the last decade from a core group that have been in operation for much longer. One-third of shoppers' have been going to markets for over 10 years, while the remaining majority only started coming in the last 10 years. The proliferation of market openings means that new market 'converts' are coming onboard. In fact, half (50%) of shoppers reported that they only started shopping at them in the past 5 years or so. Most of the remainder (33%) are dyed in the wool market supporters with more than 10 years of buying food direct from farmers.

Averaging the shorter and longer term shopping patterns reveals that on average study participants had shopped at markets for 7.6 years. Closer examination reveals some interesting factors:

- Longer term shoppers tend to have made it a weekly habit, unlike more recent converts who tend to come with less frequency.
- Shoppers who source local food from markets and other alternative distribution channels (farmgate, CSA's, pick your own, etc.) tend to have a longer history of buying at farmers' markets than newer market converts who still rely primarily on supermarkets for local food.
- Older shoppers (50+ years) have a longer history of shopping at markets than others. The same holds true for those without university/community college education versus those with post-secondary education; the former group on average have shopped at markets for 9.2 years versus 7.4 for the latter segment.
- First year shoppers, those who just started to shop at markets in the last year, tend to be lower spenders (under $40) and may live in small size households (one or two members).

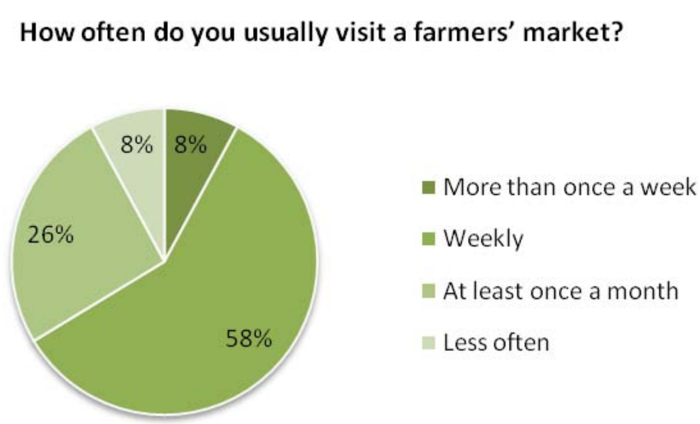
- People who were born outside of Canada are more likely to be just getting acquainted with markets than those who were born here.



How Often do you Shop at Markets?

Two-thirds (67%) of market shoppers indicated that they come to the market every week – 8% of them shop at a market more often. These high frequency shoppers spend over $40, on average. Most of the remaining one-third drop into a market about once a month and to pick up extra things; they rely on supermarkets for the bulk of their food purchases.

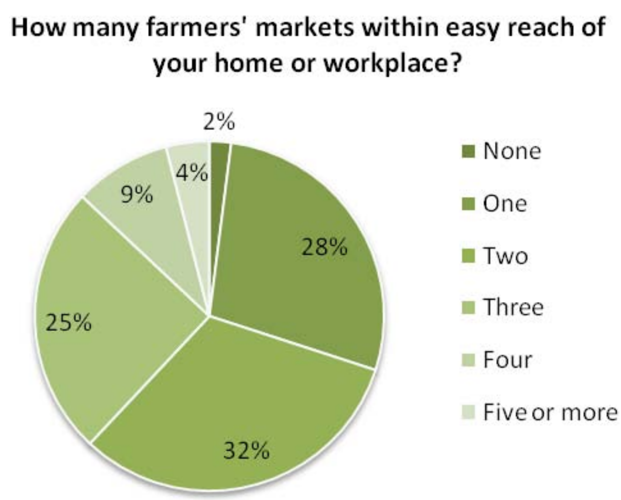
The mainstay of farmers' markets, those who shop weekly, are there primarily to buy some or a lot of their groceries. And this habit has been built over a number of years – six or more years. Expenditure tends to build over time and with experience.



How Many Farmers' Markets are Easily Accessible?

Most of the study participants have a choice of markets. On average, 2.3 markets are within easy reach of work/home. Very few (2%) say there are not served by at least one handy market.

- About one in four shoppers (28%) indicate that there is only one market close at hand. This segment of shoppers tends to visit with low frequency and has a limited purchase list. Most likely they buy things to augment what they get at supermarkets.
- One in three shoppers (32%) have choice with two market options close at hand.
- Almost four in ten shoppers (38%) can choose from at least three markets – 14% have four or more choices.
- High frequency, 'Big' budget shoppers tend to have more choice than lower frequency, 'Small' budget shoppers.



What are the Positive Aspects of Farmers' Markets?

This question evoked an outpouring of reasons why shoppers go again and again to farmers' markets. On average shoppers indicated 5.84 factors that they liked about farmers' markets. The list spanned everything from 'fresh, local food,' to the experience of supporting and interacting with local farmers, to shopping in the relaxed atmosphere, to connecting with friends, to food and cooking education to events. Clearly, farmers' markets operate on a number of different levels, providing tangible and hard to measure benefits. In sum, they are about local, tasty food and much more.

- The lead benefits are, in order of mention: fresh/local food, support local farmers, quality/tasty food, and friendly/relaxed atmosphere.

- Longer term shoppers (six years or more) and high frequency/weekly shoppers have stronger appreciation levels of the many benefits of farmers' markets than more recent converts to farmers' markets.

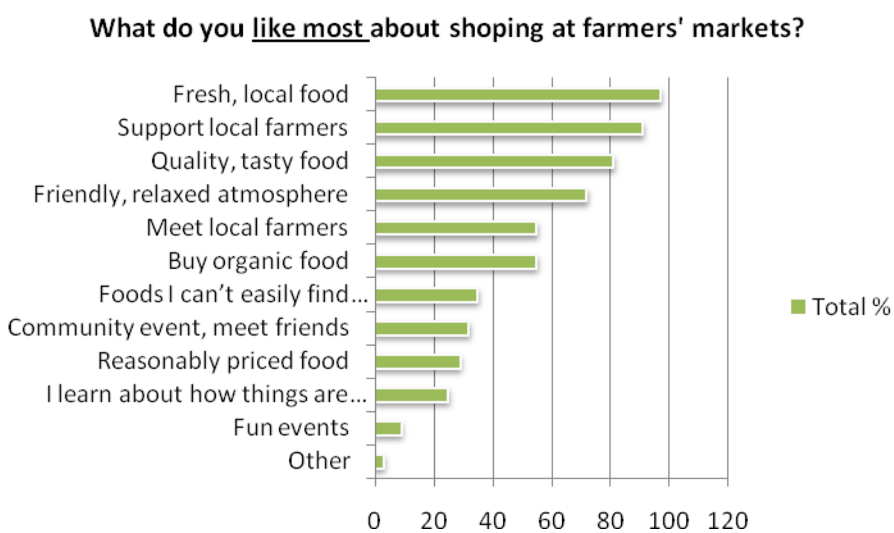
- People who come to markets to do some/most of their regular grocery shopping, 'Big' Shoppers, are particularly drawn to them for the organic options. Also, those who are primarily responsible for what is eaten at home − women − are especially interested in meeting local farmers.

- Younger shoppers (under 50 years) and those with post-secondary education are more organic food oriented than their older counterparts. Older residents place greater store in the markets' relaxed, non-frenzied atmosphere.

- Shoppers with children are particularly drawn to the market for community events and an opportunity to meet friends. It is a family-friendly outing.

- Younger shoppers also value markets because they provide an opportunity to learn about how things are grown.

- Markets are not intimidating according to those who do not have post-secondary education – they are relaxed and fun places to be.

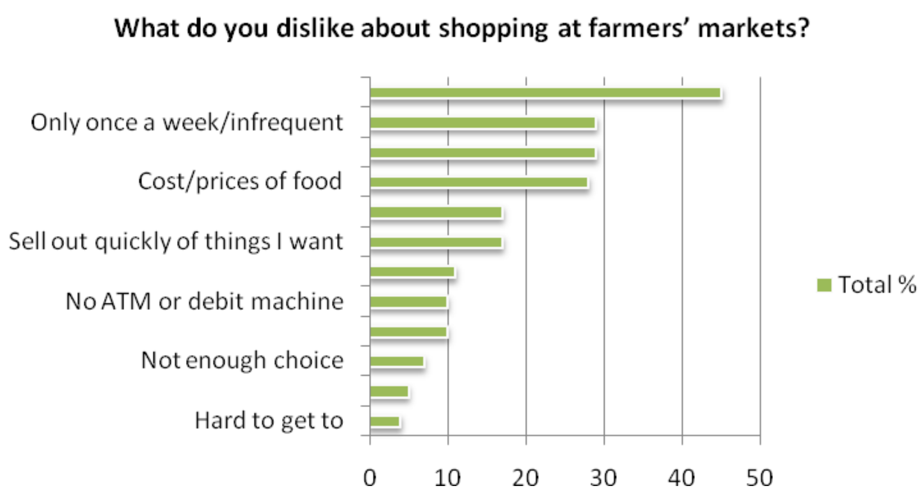


And, what are the Downsides of Markets?

The opportunity to provide critical comments generated fewer total responses – on average shoppers had 2.34 points to make, while 17% had no complaints to make.

- The dominant complaint was the limited hours and season that is typical of markets – specifically, 45% pointed out the short/limited season and another 29% drew attention to the limited hours and to the weekly nature of markets. These limitations were particularly irksome to shoppers who rely on markets for some/many of their groceries and loyally shop at them every week.

- The limited hours (29% mentioned them) and once a week schedule were especially problematic for people without children. Possibly, they work longer hours or are commuters.
- About one in four (28%) complained about the cost of market food. This factor is linked with those who spend less on average and who are lower frequency market shoppers. Also, it is worth noting that this segment is relatively new to markets. They started shopping there within the last five years and still depend mainly on supermarkets for their food.
- Out of stock, "sell out quickly of the things I want" was relatively low frequency – 17% mentioned it. However, younger shoppers were most likely to complain about it.
- One in ten (11%) thought that the number of vendors was limited at the markets they shopped at. They tended to be older shoppers and/or belonged to smaller size, adult only households.
- One in ten (10%) complained about lack of parking. Older shoppers were most likely to note this problem.
- A few other criticisms were noted: 'not enough choice' (7%) and 'hard to get to' (4%).



Buying Locally Grown Food Elsewhere?

In addition to shopping at farmers' markets, most study participants accessed locally grown food from other sources in the past year. The dominant channels include both grocery chain stores and independents – two-thirds (67%) turn to supermarkets and a surprising half (53%) buy local food from independent food stores.

Non-traditional channels featured quite strongly, with four in ten (40%) indicating that they bought some local food specifically at on-farm markets. Longer term farmers' market shoppers are most likely to frequent this source, as are those with post-secondary education.

Almost three in ten (29%) turned to pick-your-own for local supply. The opportunity to harvest freshly grown items has strongest appeal with longer term farmers' market shoppers, people living in larger households (three or more members) and those with children. Possibly, it's a family outing – part fun and part education.

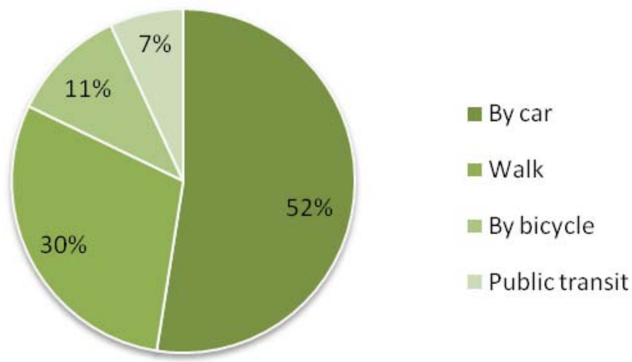
One in ten farmers' market shoppers claim to have bought a share of the crop/CSA.

How do Shoppers Travel to the Market?

Shoppers at farmers' markets are equally likely to travel by car as they are to walk, cycle or take public transit. Transportation choices vary considerably depending on the following factors:

- Older residents (over 50 years), people from larger size households (three or more occupants) and longer term market shoppers tend to opt to travel to markets by private vehicle. In total, 53% go to market by car.
- Walking is most prevalent among more recent converts to farmers' markets; clearly the market is relatively close to home/work. Overall, three in ten (30%) chose to walk to their local market.
- One in ten (10%) hop on their bicycle to get to their market. This segment skews younger and may have children living at home.
- A small proportion (7%) get to the market by public transportation. They tend to be shopping for small size households (one or two members) and do not have children.

How do shoppers travel to the market?



How Long does it Take to get to your Market?

On average, market shoppers spend 13.4 minutes to get to their local farmers' market. This figure includes both the majority who get there in less time and those who have a longer travel time, as follows:

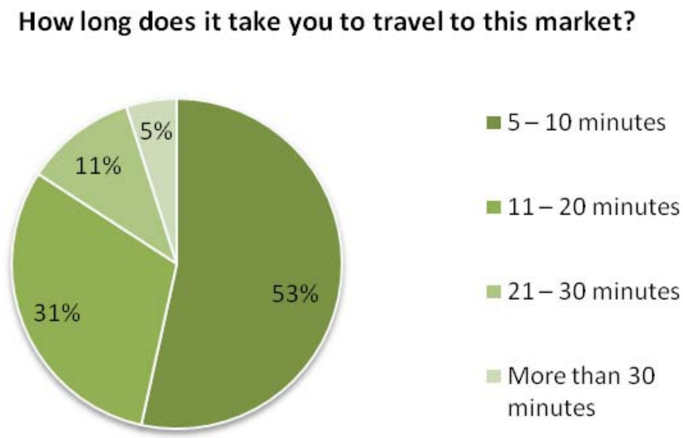
- About half of shoppers (54%) say they spend no more than 10 minutes to reach their market. Another 31% spend 11 to 20 minutes en route, and the remaining 16% take more than 20 minutes to reach this point.

- High frequency/weekly shoppers tend to be closest to their favourite market, while those who shop there less frequently have longer distances/time to travel. The average travel time is 12.6 minutes versus 15.0 minutes.

- Newer converts to market shopping (within the past five years) take longer to get to this destination that the longer term shoppers. Easy access can matter.

- Women report that it takes them longer to get to the markets than it takes the male shoppers.

- Shoppers for larger size households average shorter travel time than those who are buying for small, one- to two-person households.



How do Shoppers Feel about Farmers' Markets?

This question provided an opportunity to explore a variety of potential initiatives for enhancing markets and market offerings. Several of the suggestions that were provided received very strong support, while others had lesser impact, as follows:

High Support (70% or more Agreed)

- Open year round/add a month in the fall
- Provide more organic produce/items
- More information about farms and how produce is grown

Medium Support (65% Agreed)

- Farmers' markets are attracting more shoppers
- Meal preparation information desired

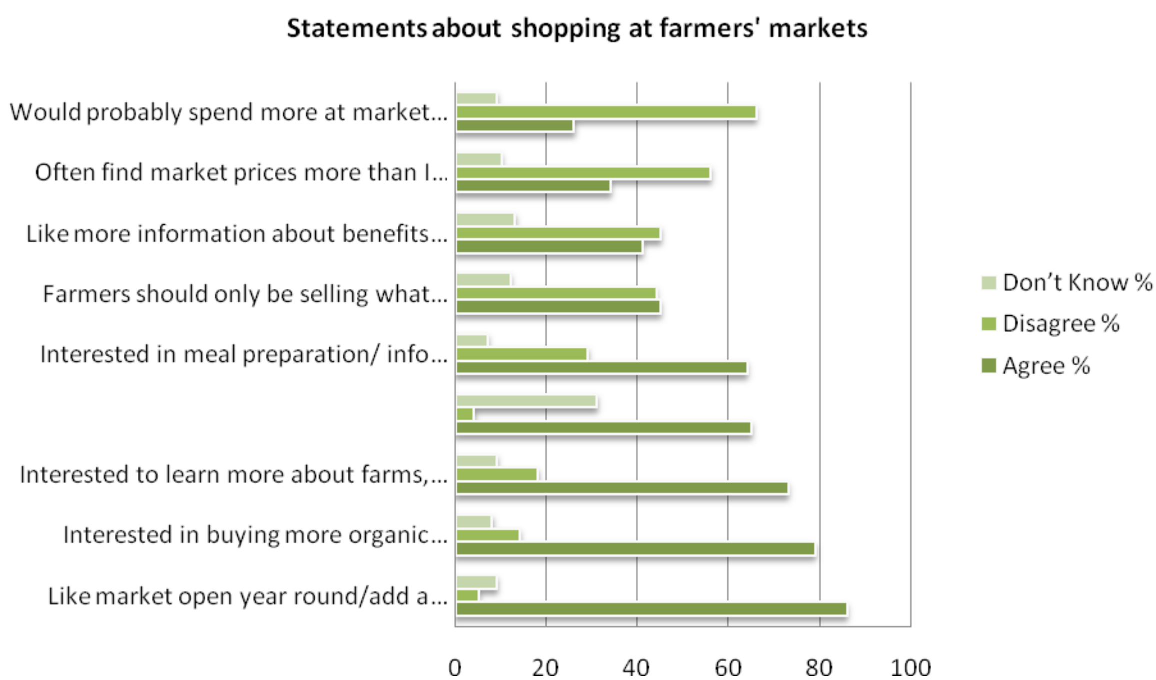
Lower Support (Less than 50% Agreed)

- Farmers should be selling only what they produce
- Need for more benefit-related information about buying local
- Prices are beyond reach of buyers
- Debit/ATM access would increase money spent

Further examination of these results provides additional insights into the different sectors of shoppers who populate farmers' markets.

- More recent converts to farmers' markets may be less accustomed to the disparity between bargain priced supermarket produce and some of the price points at farmers' markets; consequently, they spend less and buy fewer items. Lower expenditure can be a function of more limited available income.

- Younger shoppers have a greater interest in learning about farms and growing and the benefits of buying local.
- Younger and post-secondary educated shoppers have a much stronger desire to buy organic food than other market shoppers.
- Younger shoppers are more interested in using ATMs/debit cards than older shoppers.
- Weekly and longer term market shoppers are more aware than others of the increased popularity of markets.
- The desire to acquire more cooking skills spans all market shopper segments.
- Older shoppers are more adamant about maintaining the policy of permitting farmers to sell only what they produce than are younger shoppers.



What Impacts have Markets had on Shoppers?

Farmers' markets are change agents affecting attitudes, knowledge, food purchase patterns, eating experiences and cooking practices.

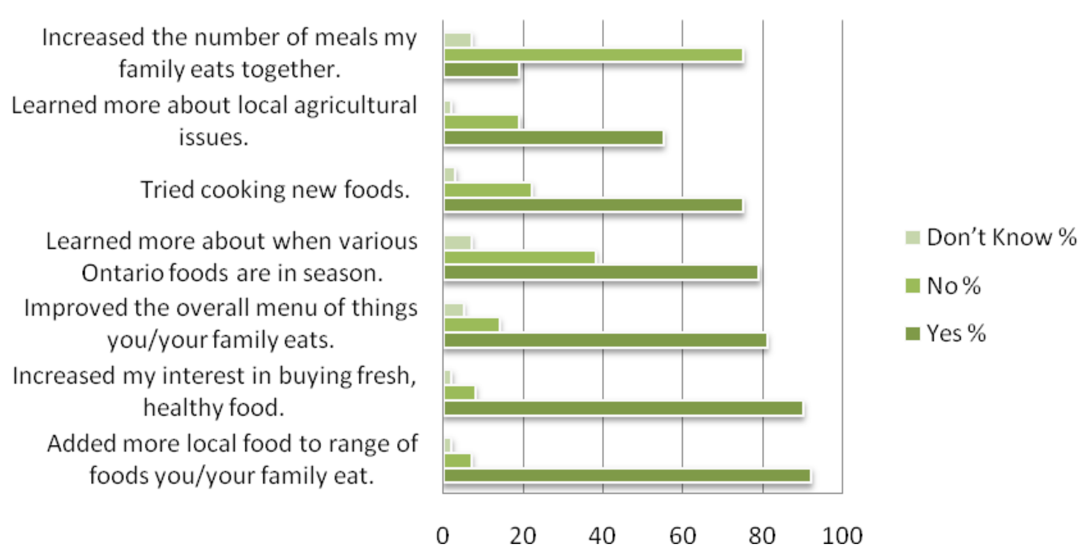
Most shoppers (75% or more):

- eat more local food
- want to buy more local, health food
- want improved family meal menu
- want increased knowledge about Ontario seasonal food
- most shoppers were inspired to expand their menu and cook new items

Just over half (55%) say that they are now more conversant with local agricultural issues – younger shoppers and 'Big,' higher budget shoppers are particularly aware of this benefit.

While most shoppers (75%) say the number of meals their family/household share together has not changed, one pocket of market shoppers has made positive strides in this direction. Almost one in four (23%) of weekly shoppers report that the fresh local food they buy at farmers' markets has led to this positive outcome.

Based on your experience buying food at farmers' markets, have you:



What Additions would Enhance Markets?

This question explored the level of appeal of 11 items as possible ways of enhancing the market experience for shoppers.

Shoppers indicated that several measures could increase the positive nature of their market experience. They span a wide range of amenities, vendor and market promotions, and offerings. At the very highest levels, shoppers agreed that markets would be taking positive steps by providing:

- seating and tables (one in four are snacking onsite),
- local/seasonal food facts,
- vendor ‘branding’ signs,
- market website showcasing grower farms, telling the farm ‘brand’ story
- onsite washrooms
- more products/offerings (fresh and value-added)

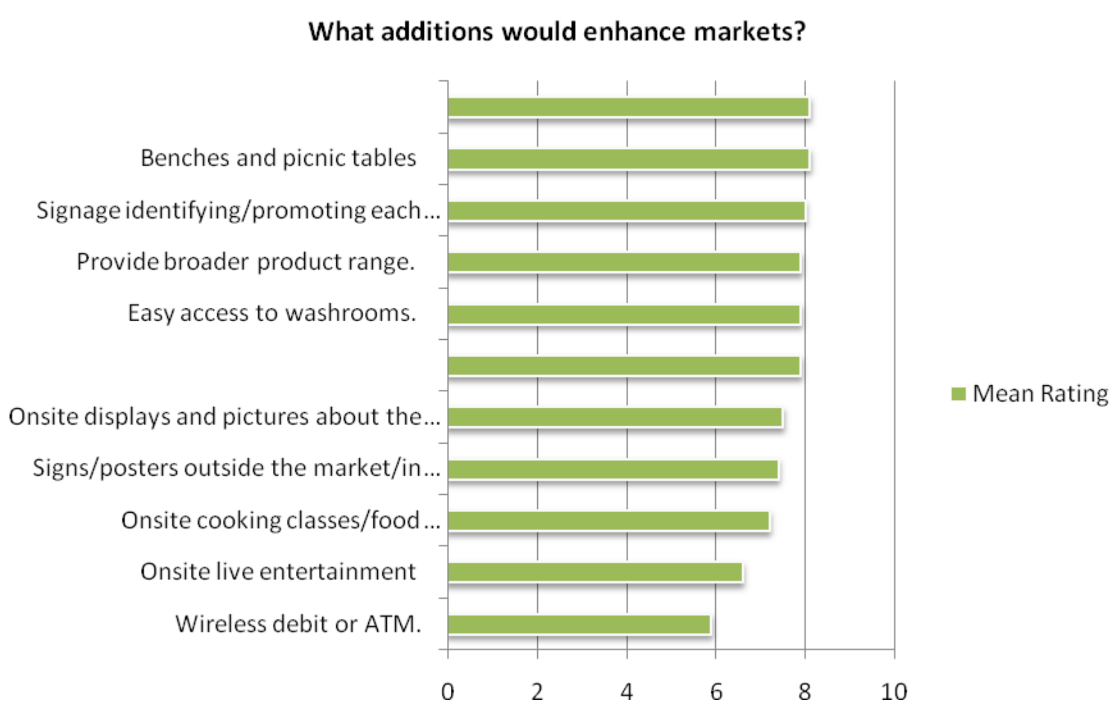
Overall there was less excitement about some other suggestions: promoting the different farms using photos, installing promotional signs adjacent to the markets, onsite cooking demonstrations and live entertainment were less likely to attract strong support. And ensuring that cashless shoppers could have access to cash or debit purchases was the least significant item.

But opinions about the significance of some of the suggestions shifted depending on several factors:

1. The age of the shopper − younger adults (under 50 years) were significantly more interested than their older counterparts in onsite farm displays, local food education, cooking classes/demonstrations, fact-filled market websites, entertainment, and access to cash or debit.
2. Household size/composition – people who shopped for three or more and those who had children were more interested in cooking classes/food demonstrations.
3. ‘Big’ volume shoppers emphasized the need for washrooms.
4. ‘Small’ volume shoppers who drop into markets for certain items including snacks or take-home food stressed the importance of debit or an ATM.

Q. Market vendors and organizers are interested in adding to the experience of shopping at farmers' markets; here is a list of things that are being considered. Using a <u>scale of 1 to 10 where 1 is the lowest and 10 is the highest,</u> would you please rate each of these suggestions.

Rating:	**Lowest** ***Not a Good Idea*** **1 to 3**	**Highest** ***Good Idea*** **(8 to 10)**	**Mean Rating**
Benches and picnic tables	**6**	**72**	**8.1**
Onsite education about local and seasonal food	**3**	**66**	**8.1**
Signage identifying/promoting each farm	**4**	**65**	**8.0**
Market website featuring pictures of the farms, stories about the farms	**7**	**67**	**7.9**
Easy access to washroom facilities	**6**	**65**	**7.9**
Provide a broader range of products	**4**	**65**	**7.9**
Onsite displays and pictures about the farms	**7**	**55**	**7.5**
Signs and posters outside the market/in the area of the market	**8**	**58**	**7.4**
Onsite cooking classes and food demonstrations	**11**	**53**	**7.2**
Onsite live entertainment	**17**	**44**	**6.6**
Wireless debit or ATM	**23**	**33**	**5.9**



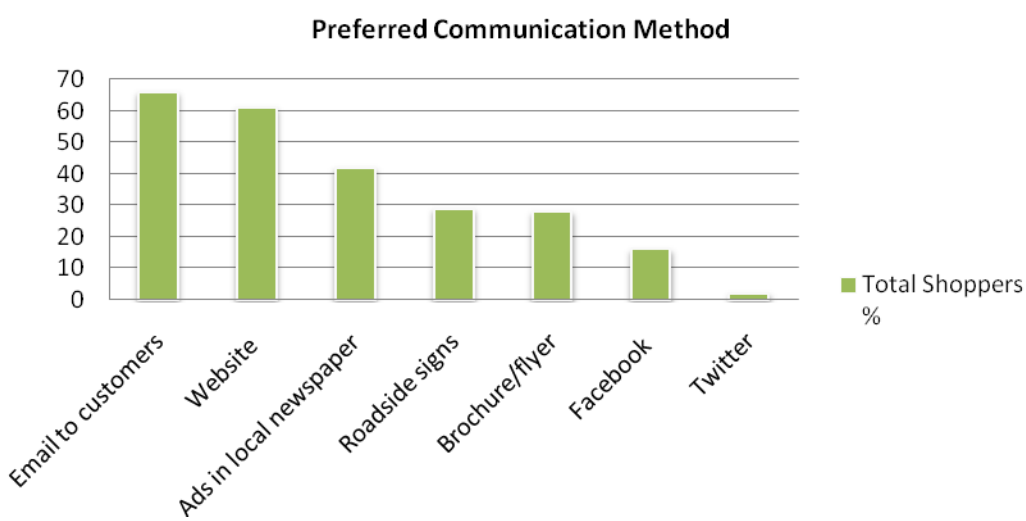
How can we Reach you with Market Information?

Market shoppers were invited to guide communications to them – what channels best served their needs?

The array of potential communication methods included both print (newspaper ads, brochures/flyers) and electronic media (website, email, Facebook, Twitter) and roadside signs. Overall, email and websites were the most popular, followed at some distance by ads in local newspapers, roadside signs and brochures. Social media tools such as Facebook and Twitter had more limited impact.

A digital divide was evident. Significant differences were noted depending on the shopper's age, stage of life, household composition and shopping frequency.

- Younger adults preferred electronic media tools - email to customers and market website.
- Older adults and high frequency/weekly market shoppers preferred print, primarily ads in local newspapers followed at some distance by brochures/leaflets.
- Facebook had much more significance for low frequency market shoppers, younger adults and people with children (markets are a family outing).

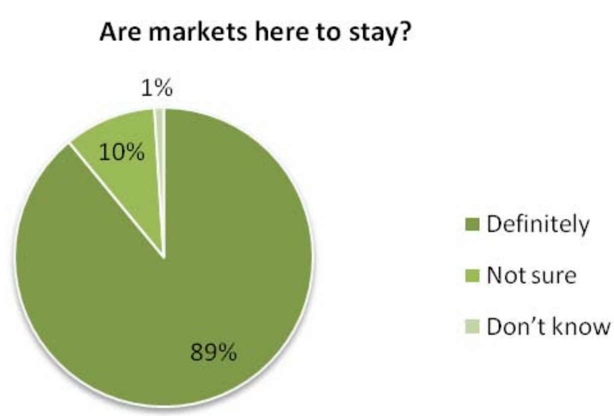


Q. What is the best way of reaching you with information about your local farmers' market? Please select as many as apply.

Preferred Communication Method:	Stronger Appeal	Weaker Appeal	Total Shoppers %
Email to customers	Younger adults (71%) Family with kids (76%)	Older adults (60%)	66
Website	Younger adults (68%)	Older adults (60%)	61
Ads in local newspaper	Older adults (56%) Weekly shoppers (46%)	Younger adults (30%) Lower frequency shoppers (34%)	42
Roadside signs			29
Brochure/flyer	Older adults (33%)	Younger adults (23%)	28
Facebook	Younger adults (24%) Family with kids (22%) Low frequency shoppers (46%)	Older adults (5%)	16
Twitter	Younger adults (3%)	Older adults (1%)	2

Are Markets here to Stay?

A resounding nine out of ten shoppers (89%) believe that farmers' markets are a permanent food distribution channel. Only one in ten are uncertain about the future of the markets.



Why Markets are here to Stay?

Why were these shoppers convinced that the future of farmers' markets is secure? On average, the 89% of study participants who were optimistic cited 1.98 reasons for their confidence. The support statements covered a wide range of factors, including the fresh, local food and beyond. They are summarized in order of mention:

- **The Food** – two-thirds of these positive thinkers mentioned one or more food related factors: food freshness/taste (24%), local food (18%), food quality (14%), and 11% cited food types (organic and variety). Older shoppers were especially appreciative that they could source fresh, local food compared to younger shoppers – 23% versus 15%. Farmers' market were noted for "fresher foods/produce," "tastes better,"' "better quality food," "food safety issue/danger of imported food," "able to buy organic" and "food you can't get anywhere else."

- **Market Demand** – 37% of the optimistic shoppers observed that demand is growing both for local food and for lending support to local farmers. Young adults (under 50 years) were most convinced (44%) compared to older adults (27%). Also, shoppers with children were more inclined to mention this than shoppers who don't have children – 46% versus 33%.

- **Market Experience** – 28% remarked on the social nature of markets, clearly drawing a contrast to conventional food shopping for markets' ability to bring people together – "better experience," "love to talk to vendors/farmers/workers/meet people who grow the food."

- **More/Better Education/Awareness** – 25% signalled the value of markets as educators, heightening awareness of "healthier foods." Older adults were particularly pleased by this benefit.

- **Economic Reasons** – 18% linked market sustainability with people's desire to support farmers and the local economy. Women were much more appreciative than men (20% compared to 12%) as were younger shoppers.

- Other reasons why some shoppers were so positive about the future of markets included: "I love it," "good value for money," "part of the weekly routine" and "wouldn't go back to supermarkets."

Detailed Table

	Reasons %
NET: Demand is there/increasing	**37**
Demand increasing for local food/supporting local farmers	11
Lots of people attend/popular	10
Demand is increasing/more and more people going	10
Always needed/will always be here/always an interest	9
Fulfilling a need/should be there	4
Demand increasing for healthy foods/organic products	3
NET: Market Experience	**28**
Brings people together/sense of community/connections/be social	**16**
Better experience/enjoyable experience	8
Love to talk to vendors/farmers/workers/meet people who grow the food/get to know them	7
Great atmosphere/love the atmosphere	3
People friendlier/happier	3
Fun	2
NET: More/Better Education/Awareness	**25**
More heightened awareness of buying local/more educated to buy local food	13
More/ heightened awareness to buy healthier foods/more educated to buy healthy food	10

More aware of the advantages of farmers' markets	5
More heightened awareness to buy fresher foods/more educated to buy fresher foods	4
More educated about what we eat	3
Net: Food Freshness/Taste	**24**
Fresh/fresher foods/produce	18
Tastier/tastes better/delicious	6
Healthier food/eat healthier foods	3
Net: Economic Reasons	**18**
Support local farmers	13
Helps sustain local economy/money stays in the community	8
Net: Local Food	**18**
To buy local food/ability to buy local	11
Know where food is coming from/comes from close to home	7
Know food doesn't come from China/Mexico/halfway around the world, etc.	1
Net: Food Quality	**14**
Better quality food	6
Food safety issue/danger of imported food	4
Local foods more environmentally friendly	4
Dangers in buying food from factory farms	2
Net: Food Types	**11**
Able to buy organic/get organic food	6
Better variety/more variety of food/food you can't get elsewhere	6
Great/awesome/the best/love it (general)	5
Good value for money/reasonable prices/good prices	3
Part of weekly routine/people come regularly	3
Wouldn't go back to supermarket once you try it/start and never go back	1
Other	8
Nothing/no reason	1
Don't know/no answer	1

How can Farmers' Markets can be Improved?

This question evoked a long list of suggestions touching many factors. Tellingly, most were not related to the food and echoed points made earlier in the survey. Here is a summary listed in order of significance:

1. Operating hours/days (20%) – limited market hours, operating days and/or season need to expand to increase access for time-starved shoppers. Younger adults, people with post-secondary education and those who live in small size households (one or two members, likely adult only) were most likely to point to this desired improvement.

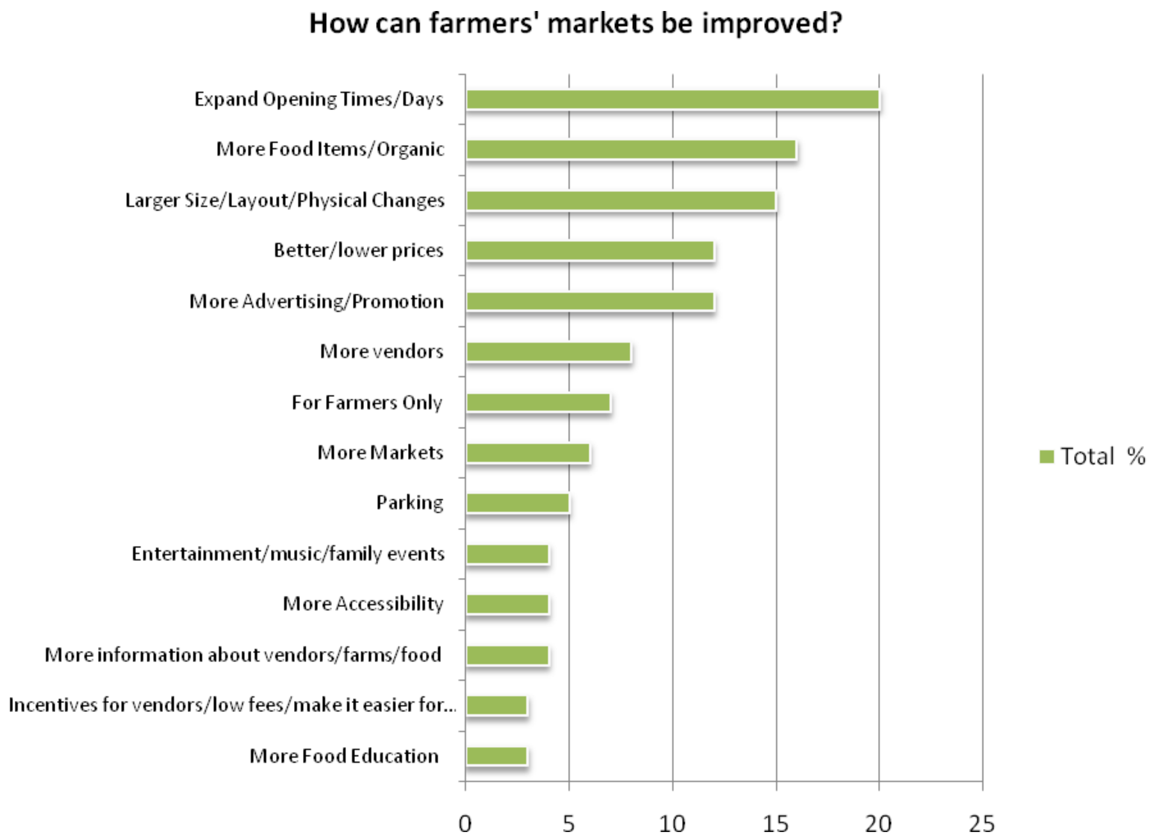
2. Selection of food items (16%) – a wider selection of food, including more organic, more ready made/prepared items. People with post-secondary education and 'Small' volume shoppers were keenest on expanding food options.

3. Size/Layout (15%) – larger/more area to relieve crowding and larger eating and sitting areas. Older and long term market shoppers were particularly keen on these upgrades.

4. Increase Advertising (12%) – promote markets more including seasonal crops and health benefits.

5. Lower prices (12%) – align prices with supermarket levels.

6. Other: only for farmers not resellers, more market locations, better/more parking, more vendor/grower information, entertainment, education about benefit of buying local, more accessibility for lower income residents, better signage, recipes, ATM's.



Q. What could be done to improve farmer's markets as a place to buy local food?

Suggested Improvements:	**Total %**
Net Opening Times	**20**
Net Selection of Food Items	**16**
Net Size/Layout/Physical Changes	**15**
Net Advertising	**12**
Better/lower prices/more in line with supermarket	12
More vendors	**8**
Net For Farmers Only	**7**
Net More Markets	**6**
Net Parking	**5**
More information about vendors themselves (type of farm, how food grown, location, etc.)	4
Net Accessibility	**4**
Entertainment/music/family events/special events	4

Net Education	**3**
Incentives for vendors/lower fees/make it easier for them to sell products	3
Make accessible to lower incomes/all income levels/not just for middle/upper class	2
More/better signage	2
Recipes/how to prepare items/for non-traditional items	2
ATM's/more ATM's/way of getting cash	2
More like European markets/community event/broader experience	2
Less non-food vendors/eliminate non-food vendors	1
Rules for dogs/ban dogs	1
More diverse clientele/advertise to a wider range of customers	1
Great as it is/no changes needed	7
Can't think of anything	2
Other	9
Nothing/no reason	5
Don't know	3

Detailed Table

Suggested Improvements:	Total %
Net Opening Times	**20**
Longer/extended hours	6
Open all year/year round	6
More frequent/open more days	5
Longer season	4
Open on weekends	2
Net Selection of Food Items	**16**
More/better selection	**12**
More organic items	**2**
More ready-made items/prepared items	2
More of specific items (butter, cheese, herbs, etc.)	2
Net Size/Layout/Physical Changes	15
Larger/more area (crowded)	5
Eating area/café/place to sit/picnic tables	**3**
Inside location/permanent venue	3
Changes to the layout (any) (i.e., moves booths around, more space between booths, etc.)	2

Weatherproof/sheltered	2
More area in winter months (crowded)	1
Play area/something for kids to do	1
Washrooms	1
Net Advertising	**12**
More advertising/publicity (general)	9
Advertise seasonal crops	2
Advertise health benefits	1
Better/lower prices/more in line with supermarket	12
More vendors	8
Net For Farmers Only	**7**
Get rid of those who sell products from food terminal/get rid of middlemen/real farmers only	7
Ensure all items local/seasonal	7
Net More Markets	**6**
More markets/more locations	4
Have more organic/organic markets/organic gardens	2
Net Parking	**5**
Better parking	3
More parking	1
Free parking	1
More information about vendors themselves (type of farm, how food grown, location, etc.)	4
Net Accessibility	**4**
Better accessibility/easier access	2
More accessible by transit	2
Entertainment/music/family events/special events	4
Net Education	**3**
More information on benefits of farming/community (community benefit, education, etc.)	2
Advertise/education people about benefits of buying local	2
More info on how to grow own food	1
Incentives for vendors/lower fees/make it easier for them to sell products	3
Make accessible to lower incomes/all income levels/not just for middle/upper class	2
More/better signage	2
Recipes/how to prepare items/for non-traditional items	2
ATM's/more ATM's/way of getting cash	2
More like European markets/community event/broader experience	2
Less non-food vendors/eliminate non-food vendors	1
Rules for dogs/ban dogs	1

More diverse clientele/advertise to a wider range of customers	1
Great as it is/no changes needed	7
Can't think of anything	2
Other	9
Nothing/no reason	5
Don't know	3

Appendices

Appendix 1

List Of Markets That Accepted Survey Cards/Agreed To Assist

Ancaster Farmers' Market
Appletree Farmers' Market, Toronto
Barrie Farmers' Market
Birch Cliff Village Farmers' Market, Scarborough
Brampton Farmers' Market
Burlington Mall Farmers' Market
Caledon Farmers' Market
Cobourg Farmers' Market
Downtown Georgetown Farmers' Market
Downtown Stouffville Farmers' Market
Dufferin Grove Organic Market
Dundas Farmers' Market
East Gwillimbury Farmers' Market
Evergreen Brickworks Farmers' Market, Toronto
Farmers' Market at the Village, Niagara-on-the-Lake
Green Barn Farmers' Market, Toronto
Grimsby Farmers' Market
Guildwood Village Farmers' Market
Harbourside Organic Farmers' Market, Oakville
Hillcrest Mall Farmers' Market
Lindsay Farmers' Market
Main Street Markham Farmers' Market
Market on Broadway (Orangeville)
Montgomery's Inn Farmers' Market, Toronto
North York Civic Centre Farmers' Market
Oakville Civitan Farmers' Market
Ottawa Street Farmers' Market
Owen Sound Farmers' Market
Pelham Farmers' Market
Riverdale Farm Farmers' Market
Sorauren Park Farmers' Market
Stonegate Farmers' Market
Sunderland Farmers' Market
Trinity Bellwoods Farmers' Market
Uxbridge Farmers' Market
Welland Farmers' Market
Whitby Farmers' Market

Williamsford Farmers' Market
Withrow Park Farmers' Market
Woodbridge Village Farmers' Market

Appendix 2

Greenbelt Farmers' Market Network

Final Questionnaire: Consumer Online Survey

Introduction

Thank you for agreeing to take part in this survey. Your answers will be treated in confidence and will be pooled with others. Your feedback will be very helpful in assisting farmers' markets in planning to better serve the needs of shoppers.

When you have completed this survey, you will be eligible to take part in a draw for $100 market dollars that can be spent at your favourite farmers' market. The rules and entry form for the draw are at the end of the survey.

1a.Thinking about who does the grocery shopping in your household – which statement is applicable?

I am the main grocery shopper	1
Grocery shopping is a shared task	2
Other (Please specify)	3

1b.And, thinking about your last visit to a market, what was your <u>main</u> reason for visiting: ONLY ONE ANSWER

I came to buy regular grocery items	1	
I came for a specific item	2	
I came to buy a meal or snack to eat at the market	3	
I came to see friends/neighbours	4	
I came for an outing or as a tourist	5	
I came for a special event or program	6	
Other (Please specify)…………	7	
None/no other reason	8	SKIP TO Q.1d

1c. Are there any other reasons why you visited a market? MORE THAN ONE PERMITTED

I came to buy regular grocery items	1
I came for a specific item	2
I came to buy a meal or snack to eat at the market	3
I came to see friends/neighbours	4
I came for an outing or as a tourist	5
I came for a special event or program	6
Other (Please specify)…………	7
None/no other reason	8

1d. Here is a list of items, which if any did you buy on your last visit? Please select from the list below.

Vegetables	1
Berries/strawberries/blackberries	2
Tender fruits/peaches/plums	3
Apples and pears	4
Herbs	5
Meat, beef, lamb, pork	6
Chicken	7
Specialty meat (elk, boar, goat)	8
Eggs	9
Cheese	0
Bread, baking	X
Crafts	Y
Cut Flowers	Z
Plants/seeds	XX
Prepared food to take home	YY
Snacks/Prepared food to eat at market	ZZ
Coffee or tea	XXX
Maple Syrup	YYY
Honey	ZZZ
Nothing/No purchases	SKIP TO Q.1f

OTHER (Please Specify) ________________________________

1e. Approximately, how much did you spend at the market on this last visit? Please select from the list below.

Under $10	1	ASK Q. 1F
$10 – 19.99	2	ASK Q. 1F
$20 - $29.99	3	
$30 - $39.99	4	
$40 - $49.99	5	
$50 - $59.99	6	
$60 - $69.99	7	
$70 or more	8	
DON'T KNOW/CAN'T RECALL	9	

ASK PREVIOUSLY INDICATED CODES ONLY 1f. If you made few/no purchases, what are the reasons for not buying more of your weekly groceries at the farmers' market?

Couldn't find what I wanted 1
Prices higher than I wanted to spend 2
Too hard to carry it home 3
Weather conditions not conducive to shopping 4
Not convenient enough 6
Other (Please specify)

<u>ASK ALL</u>

2a. About how long have you been shopping at farmers' markets?
Less than 1 year 1
1 to 2 years 2
3 to 5 years 3
6 to 10 years 4
More than 10 years 5

2b. How often do you usually visit a farmers' market? Please select the statement that applies.
More than once a week 1

Weekly 2
At least once a month 3
Less often 4

3. How many farmers' markets are within easy reach of your home or workplace?
One 1
Two 2
Three 3
Four 4
Five or more 5

None 6

4a. What do you <u>like most</u> about shopping at farmers' markets? Please select all that apply.
Fresh, local food 1
Support local farmers 2
Meet local farmers 3
Friendly, relaxed atmosphere 4
I learn about how things are grown 5
Community event, meet friends 6

Buy organic food	7
Reasonably priced food	8
Quality, tasty food	9
Foods I can't easily find elsewhere	10
Fun events	11
Other (Please specify)	
None of the above	12

4b. And, what do you <u>dislike</u> about shopping at farmers' markets?

Only once a week/infrequent	1
The short season – summer only	2
Limited hours	3
Cost/prices of food	4
Not enough choice	5
Parking problems/insufficient parking	6
Not enough vendors/booths	7
No ATM or debit machines	8
Sell out quickly of things I want	9
Hard to get to	10
Other (please specify)	11
None of the above	12

H 4c. In the past 12 months have you bought locally grown food in other ways, ? See the list below and check all that apply.

Pick-your-own farms	1
On-farm market	2
Bought a share of the crop/CSA	3
None of the above	4
Independent grocery store	5
Grocery chain or other retail store	6

5a. How you usually travel to your local farmers' market? Please select below.

By car	1
Public transit	2

Walk	3
By bicycle	4

5b. And, about how long does it take you to travel to this market? Please select below.

5 – 10 minutes	1
11 – 20 minutes	2
21 – 30 minutes	3
More than 30 minutes	4

6. Here is a list of statements about shopping at farmers' markets. For each would you tell me if you agree or disagree.

	Agree	Disagree	Don't Know
I am interested learning more about farms and how the produce is grown.			
I am interested in buying more organic produce/items.			
I often find that prices at the market are more than I am willing to spend.			
I would probably spend more money at the market if there was an ATM or I could use my debit card.			
I would like to have more information about the benefits of buying local.			
I am interested in information about how to prepare meals with market ingredients.			
As far as I can tell, the number of people who shop at the market has increased in the last year.			
I think that farmers should only be selling things they produce on their own farm.			
I would like my farmers' market to be open year round/add a month in the fall.			

7. Based on your experience buying food at farmers' markets, have you:

	Yes	No	Don't Know
Tried cooking new foods?			
Added more local food to the range of foods you/your family eat.			

Increased my interest in buying fresh, healthy food.			
Improved the overall menu of things you/your family eats.			
Learned more about local agricultural issues.			
Learned more about when various Ontario foods are in season.			
Increased the number of meals my family eats together.			

8. Market vendors and organizers are interested in adding to the experience of shopping at farmers' markets; Here is a list of things that are being considered. Using a scale of 1 to 10 where 1 is the lowest and 10 is the highest, would you please rate each of these suggestions.

	Rating 1-10
Onsite displays and pictures about the farms	
Signage identifying/promoting each farm	
Onsite education about local and seasonal food	
Onsite cooking classes and food demonstrations	
Market website featuring pictures of the farms, stories about the farms	
Onsite live entertainment	
Signs and posters outside the market/in the area of the market	
Wireless debit or ATM	
Easy access to washroom facilities	
Benches and picnic tables	
Provide a broader range of products	

9. What is the best way of reaching you with information about your local farmers' market? Please select as many as apply.

Website 1

Email to customers	2
Brochure/flyer	3
Roadside sign(s)	4
Ads in local paper	5
Facebook	6
Twitter	7
Other (please specify)	8

10a. From what you can tell now, are markets here to stay?

Definitely	1	
Not sure	2	
Definitely not	3	SKIP TO Q.11
DON'T KNOW	4	SKIP TO Q.11

10b. Why is that? Please explain.

11. What could be done to improve farmer's markets as a place to buy local food?

BASIC DATA

Now, before closing, please help classify our information.

A. GENDER

Female	1
Male	2

B. Would you please indicate in which age group you belong?

Under 21	1
21 - 30	2
31 - 40	3
41 - 50	4
51 - 60	5
61 - 70	6
71 and over	7
REFUSED	8

C. What is the highest level of education that you have completed?

Public school	1
Some high school	2
Graduated high school	3
Community college or University	4

D. How would you classify your occupation?

Professional	1
Manager/business owner	2
Sales/clerical	3
Skilled/trades	4
Unskilled	5
Farmer	6
Homemaker	7
Retired	8
Student	9
Unemployed	10
Other	11

E. How many people live in your household? __________ 1

2

3

4

5+

F. How many adults over the age of 18 would that be? __________

G. How many children under 18 years would that be?_________ 1

2

3

4+

H. Were you born in Canada?

Yes 1

No 2 ASK Q.I

I. In what country were you born? _______________________

Thank you for taking part in the survey.

If you would like a chance to win a $100 worth of shopping dollars that can be spent at your favourite farmers' market, please provide your name and a phone number where we can reach you. We promise that we will not use this information to contact you in the future or sell your contact information.

Name_________________________________

Phone No. ______________________________

Favourite Farmers' Market ____________________

☐I would like to receive the future communications related to farmers' markets.

Contest Rules:

☐ I have read and agree to the rules below. (MUST COMPLETE)

Official Contest Rules

CONTESTANT ELIGIBILITY

Contest is open to all legal residents of Ontario. Notwithstanding the above, the contest is not open to individuals who are directly associated with the Greenbelt Foundation, including

a. Employees of the Friends of the Greenbelt Foundation or Greenbelt Farmers' Market Network or Informa Market Research
b. The agents or representatives of the Foundation (including their respective divisions, subsidiaries, affiliates and advertising or promotional agencies) and suppliers in connection with this contest. (collectively, the "Excluded Individuals"). This Contest is not open to the immediate family members of the Excluded Individuals, and all other persons with whom the Excluded Individuals reside.
c. Employees, managers and vendors at participating farmers' markets.

Prospective winners must answer a skill-testing question to qualify.

HOW TO ENTER

No purchase is required to enter. Odds of winning will be dependent on the number of eligible entries received prior to the contest closing date, November 12, 2010. Entries will not be eligible if sent by any method not specified above or if not submitted within the duration of the contest period. One entry per person.

PRIZE AND PROCESS

- One prize will be awarded. Winner will be selected at random, from the list of all eligible contestants, by an independent third party, and will be contacted by telephone. Approximate retail value of each prize is $100.00 CDN .There is no cash prize. Market Dollars may be redeemed ONLY at the market stated on the winners' entry form. In the event that the selected market has closed for the season, contest organizers will give the winner the choice of receiving vouchers to spend in 2011, or vouchers to spend at a selected year-round market.
- In order to be declared a winner, a potential winner must be in compliance with these Official Contest Rules and, in particular, the following:

a. Contest organizers must be able to reach the potential winner, by telephone, on or before November 30, 2010.
b. The potential winner must complete, sign and return a standard form declaration and release prepared by the Greenbelt Farmers' Market Network within seven (7) business days from the date on which the form is sent to the potential winner.

- If a potential or declared winner is not in compliance with these Official Contest Rules, the Foundation reserves the right to disqualify such entrant from the Contest.
- Entrants will not be individually contacted, except for selected entrant or declared winner, who will be contacted by telephone.

GENERAL

- All entries become the sole property of, and are subject to verification. Any entry that is illegible, incomplete, altered, or contains false information, is invalid.
- The Friends of the Greenbelt Foundation, Greenbelt Farmers' Market Network and Informa Market Research assume no responsibility for: entries lost, stolen, delayed, damaged or misdirected, or for the failure, interruption or delay of any communication to be received, for any reason.
- Prize is non-transferable, must be accepted as awarded and cannot be exchanged by a declared winner for cash or other substitutes.
- The Greenbelt Farmers' Market Network reserves the right, at their sole discretion and without prior notice, to amend, cancel, close, suspend or reinstate this Contest at any time and for any reason whatsoever.
- By entering the Contest, each entrant agrees to abide by these Official Contest Rules, which are subject to change without notice to Contest entrants individually, and each entrant releases the Foundation, the Greenbelt Farmers' Market Network, and their respective parents, affiliates, subsidiaries, directors, officers, employees, representatives, agents and advertising and promotional agencies, from any damage, loss or liability suffered as a result of or arising from the entrant's participation in the Contest.
- The Contest is void where prohibited by law and is subject to all applicable federal, provincial and municipal laws and regulations.

The Contest and the these Official Contest Rules shall be exclusively governed by and construed in accordance with the laws of the province of Ontario. Any dispute shall be adjudicated in the courts sitting in Toronto, Ontario.