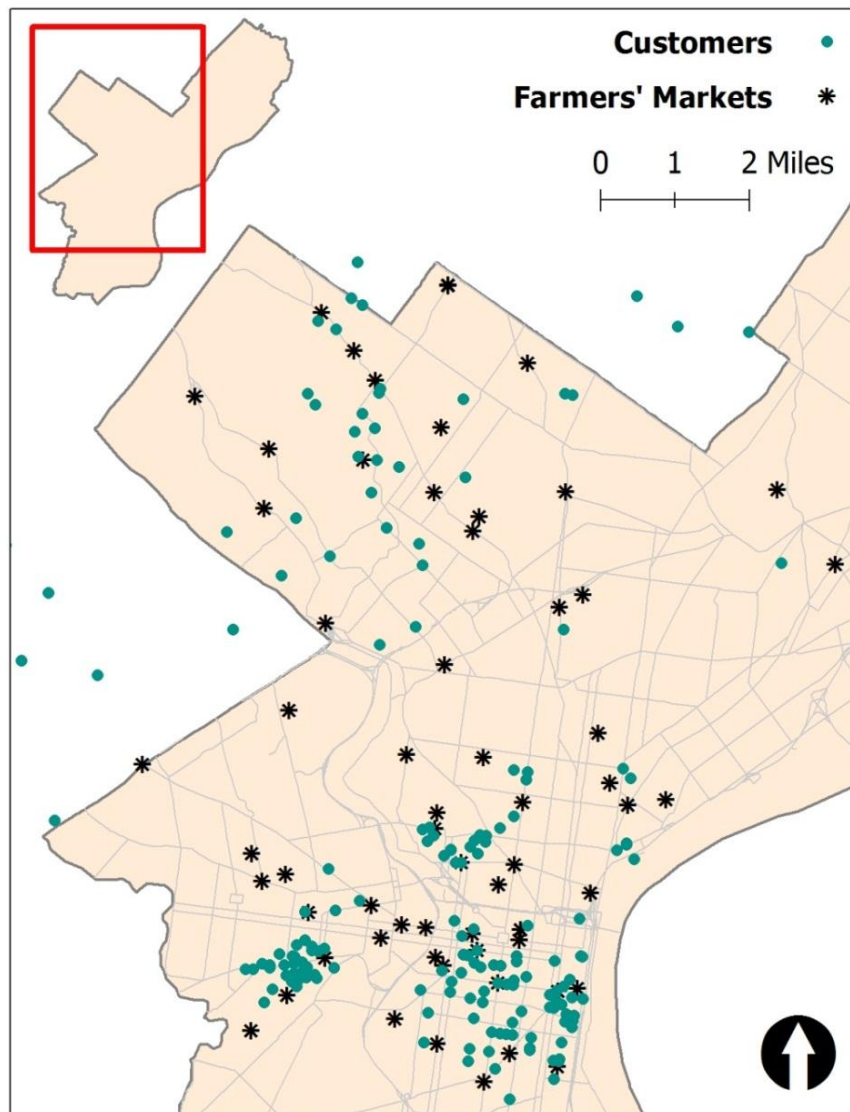

A Survey of Philadelphia's Farmers' Market Customers (2012)

In Fall 2012, an 18-question online survey was distributed to Philadelphia's farmers' market customers. The survey was co-administered by Farm to City, a mission-driven small business that operates a number of farmers' markets in Philadelphia, and Mahbubur Meenar, a Temple University researcher at the Center for Sustainable Communities. A total of 232 anonymous responses were recorded, out of which 23 were invalid (without any single answer). The analyses of the remaining 209 valid responses were primarily done by Temple University's Community & Regional Planning students Brian Olszak and Gregory App. This brief report presents the key findings of this survey. Questions or comments may be sent to meenar@temple.edu. This is a draft report. The results, either in parts or full, should not be cited without prior written permission.

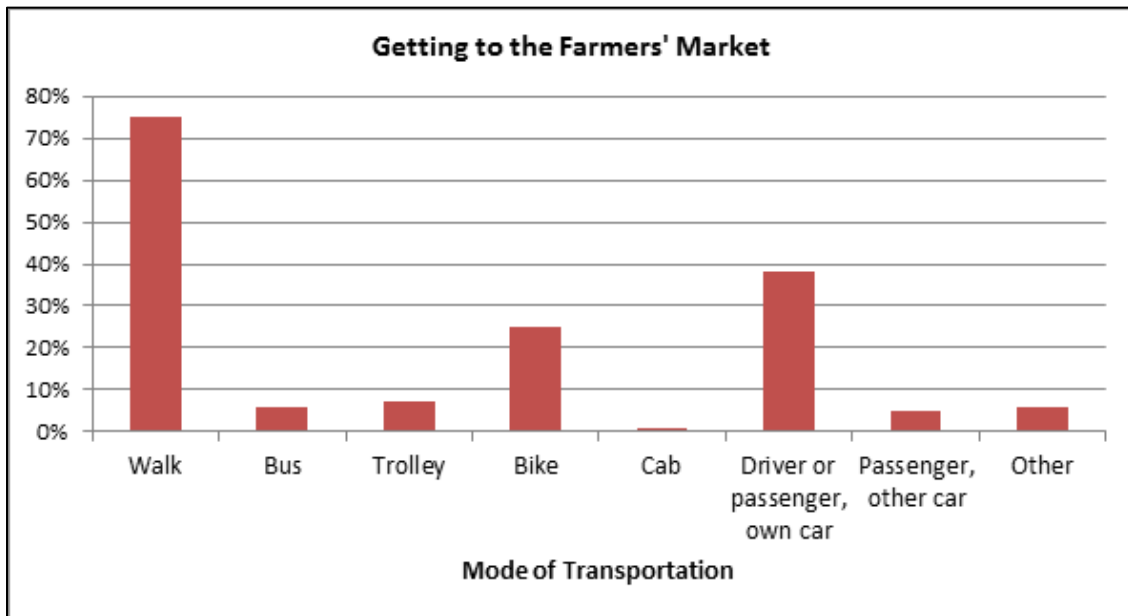
Location

The following map shows the locations of Philadelphia's farmers' markets and approximate locations of the customers who participated in this survey. The participants provided their location information in the form of either "nearest street intersection" or "block address." Data were analyzed using the Geographic Information Systems (GIS).



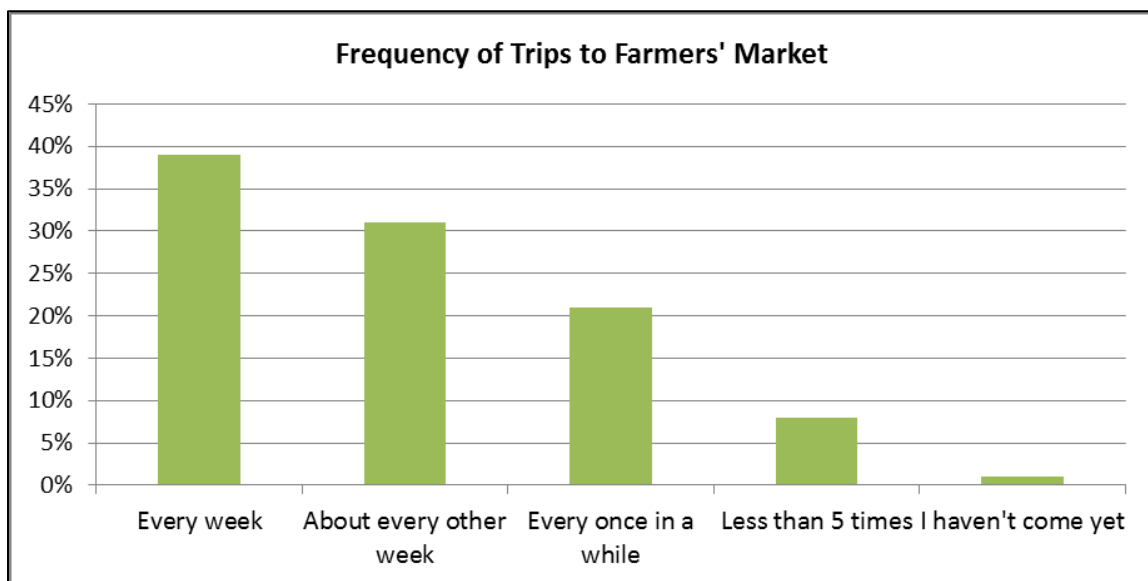
Transportation

The vast majority of respondents (75%) walked at least some distance to visit a farmers' market, with the next most-used modes being a personal automobile and bicycle. This suggests that farmers' markets are generally situated in neighborhoods where the immediate residents alone could support such a market. The following Bar Chart shows all the modes of transportation used by the participants. The "other" category included different public transportation options, i.e., EL, subway, and regional lines.



Shopping Habit

The majority of respondents reported visiting a farmers' market at least twice a month, with 39% visiting the market weekly and 31% visiting biweekly. The following Bar Chart shows the frequency of visits by customers.



The majority of respondents did not prefer to commute more than a mile to shop from a farmers' market. About 67% said they preferred a distance of 1 mile or less, 15% said 2 miles, and the remaining 18% said distance did not matter to them. When asked about their other grocery shopping patterns, they mentioned regular supermarkets, grocery stores, and corner stores, as well as alternative markets such as buying clubs, community supported agriculture (CSAs), and food co-ops.

A few customers preferred particular items to be purchased from specific farmers. A few customers mentioned that having a child posed a barrier for their frequent visit to farmers' markets. Seasonality also played a role to many customers' shopping habit. Many customers chose farmers' markets, because of the unavailability of fresh produce in their neighborhoods. Here are some quotes:

“I mostly come to the market during peach and apple seasons, to buy from particular growers. Other times of year I come occasionally, but during those seasons nearly every week.”

“Seasonality has everything to do with how much I buy at farmers market – I get up to 50% of fruits and veggies in height of summer, [but only] 25% in non-growing months.”

“[I] would shop more frequently but have a baby.”

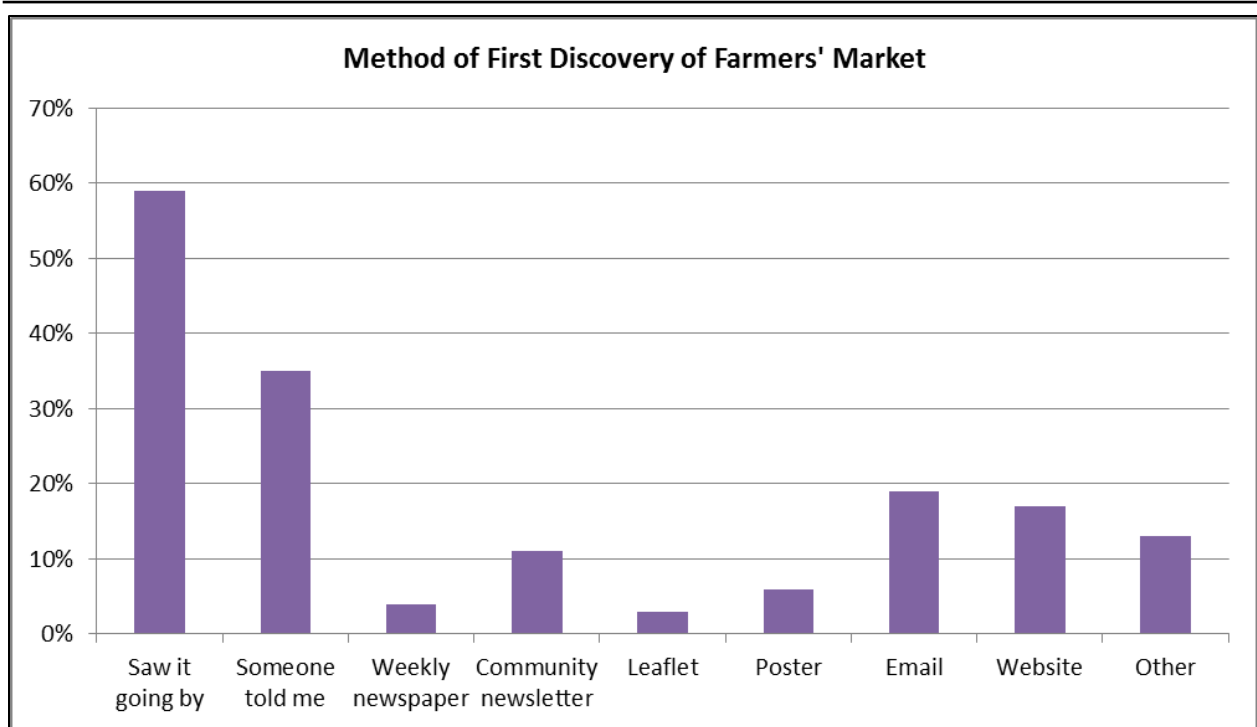
“Our two closest farmers markets are only seasonal, no winter operations.”

“The closest full-service supermarket is actually farther away from me than where the farmers' market is. The much-smaller grocery store that is down the block gets me about 50% there--their produce is touch-and-go.”

Information

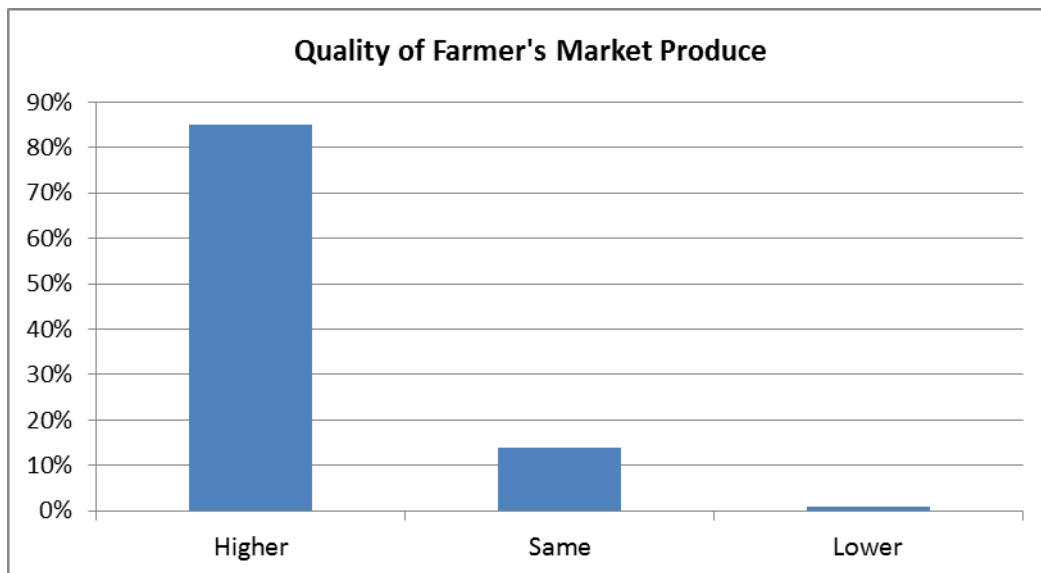
The most common way that someone initially discovered a farmers' market was by physically passing by the market one day—59% of respondents. Another 35% became aware of the market via word of mouth. This is remarkable, insofar as that the two highest-reported ways were by unintentional or informal means. Only 19% of respondents reported being alerted to a farmers' market in their neighborhood through an email, and even smaller percentages of respondents reported discovering a market by each of a number of more traditional advertising methods, such as community newsletters, weekly newspapers, leaflets, or flyers. No respondents claimed that they first discovered a farmers' market through a daily newspaper, radio or TV advertisements, or from the FMNP or SNAP lists.

This might suggest that those looking to patronize a farmers' market might already know where to find one, and that the strength of farmers' markets lies in their community-based appeal. In all, most patrons are hearing about farmers' markets due to their prominent locations, referrals from friends, and digital technologies such as a Google search or email blasts.



The Produce

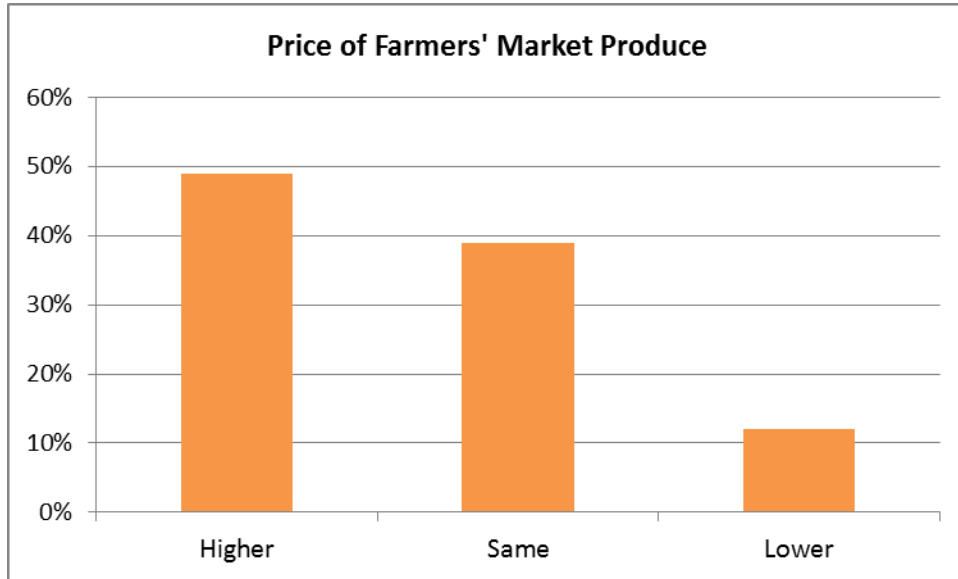
A large percentage of respondents (85%) rated their farmers' market as having “Produce...of higher quality” than the 27 people (14%) who considered the food available to be “of the same quality”. Only one person responded that the food at their primary farmers' market was “of lesser quality.” A few customers mentioned that the key factor was not the quality but the support for local farms.



“I like to allocate a specific amount a week to spend at the Farmers Market. It's hard to say overall that produce tastes better---some does, some doesn't necessarily taste any better than what I would buy at the supermarket. It's more a matter of supporting local farms, and knowing that connection.”

“Food quality has been left out by me because it depends how the produce is cared for at the market. I have seen produce left to sit in the sun for hours on end, wilted and unloved. I do not buy when I see that. It is fresher sometimes when it is refrigerated and delivered to an indoor market with air conditioning and refrigeration.”

About 45% reported that the produce was of a higher price at the farmers’ market while 39% found the prices to be the same price and 23 people (12%) enjoy lower prices at the farmers' market. In all, 97 people – 51 percent of respondents – reported that produce was of the same or lower price than their regular supermarket.

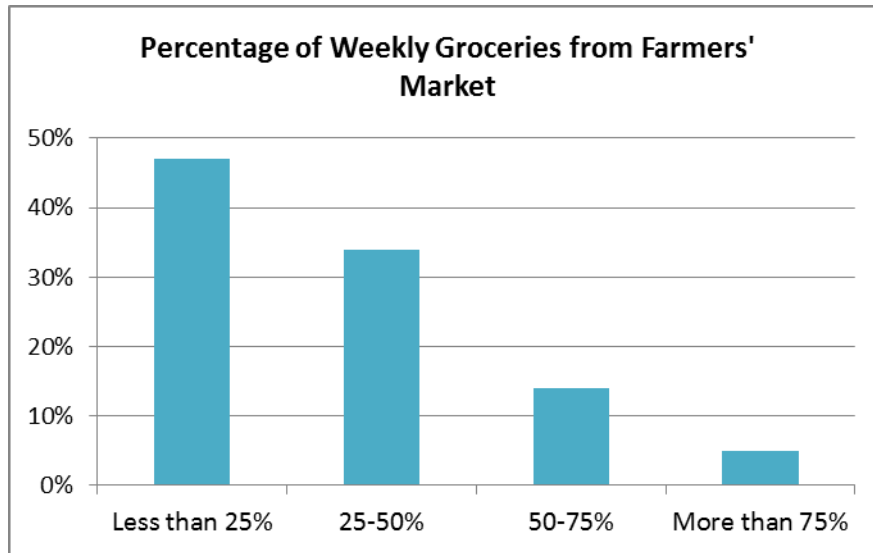


“[It is] hard to compare farmer's market prices to grocery prices... seasonality plays a big part in price. Also, CSA prices are SIGNIFICANTLY cheaper than farmer's market. Therefore, I only buy specialty/novelty items at farmer's markets.”

“I go by the farmers' market sometimes, usually when I'm passing the area. I TRY to find things to buy, but they're always too expensive. Sometimes I buy one or two items, fruit, or a veg I don't grow for myself. It just seems too boutique-y. Yes, I'm in a community garden, so I can grow some of what we eat, and I find we don't need a lot of exotic extras.”

“I feel that it is very expensive to shop at the [name removed] market. I can blow through \$60 in under 10 mins and sometimes we've eaten everything I've bought in about 2 days. There don't seem to be any bargains but the quality is SUPERB, so I will continue to shop and support local farmers.”

Overall, 81% of the respondents purchased less than half of their weekly food from the farmers' market. Several comments shed some light as to why nearly three-quarters of respondents purchase 50% or less of their weekly grocery needs from the farmers’ market. Some respondents lamented that the limited selection of produce, the limited hours and locations, and the expense involved limited their ability to purchase most or all of their produce from these markets.

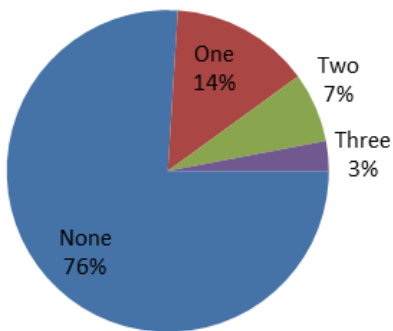


One respondent noted that:

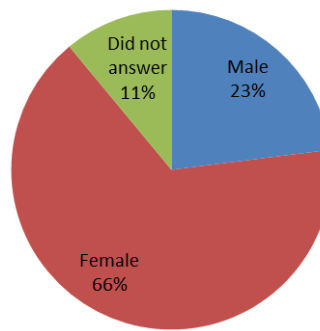
“[I] would love for more farmers’ markets to be open in to the evening hours. Finding time around a normal work schedule is one of the hardest things to work around. [I] also find that dairy products feel very expensive, which usually makes us purchase at a supermarket instead.”

Survey Participants: Demographic Data

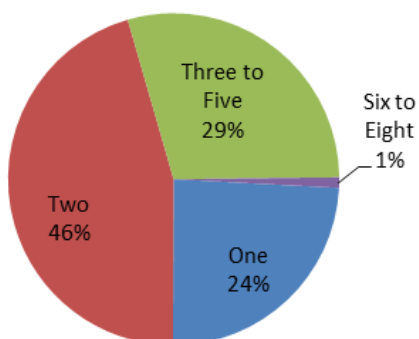
Children in Household



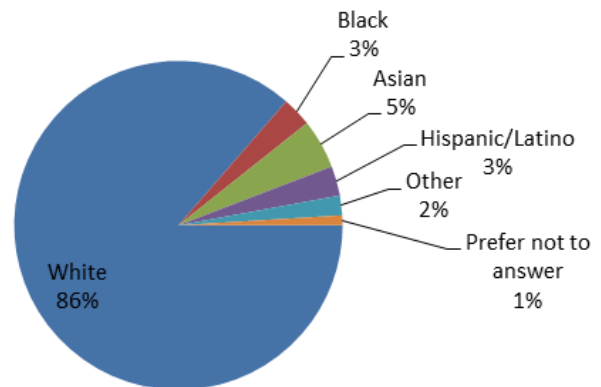
Gender



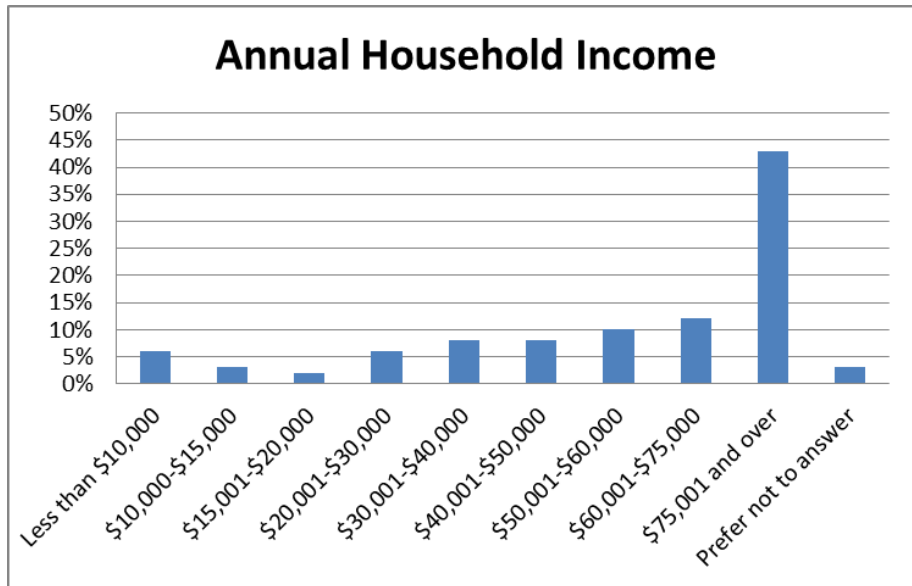
Household Size



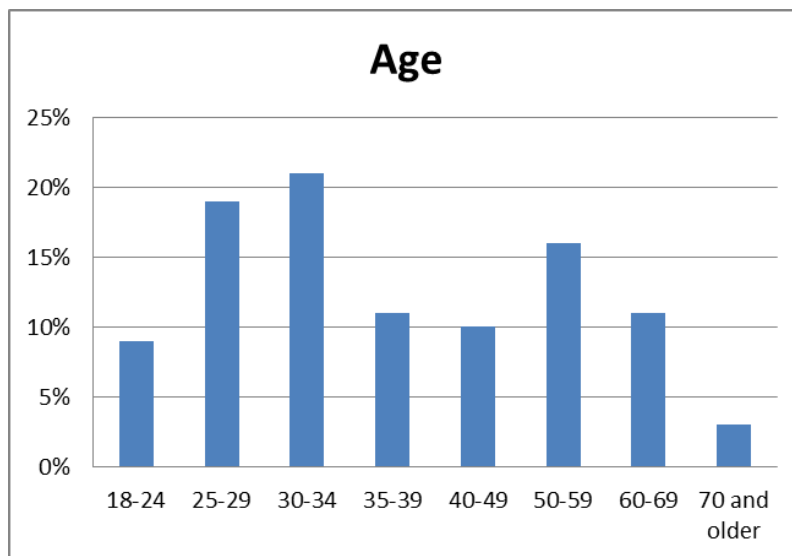
Primary Race/Ethnicity



More than half of the respondents (65%) had an annual household income of over \$50,000, while more than 40% had a household income of over \$75,000.



Sixty-one percent of those who participated in the survey were under the age of 40. The most well represented age cohorts were the 30-34 age bracket, the 25-29 bracket and the 50-59 year old group.



When asked if a respondent had used SNAP (food stamp), Philly Food Bucks, or Farmers' Market Nutrition Program (FMNP) in the past 12 months, only 8 respondents answered. Both SNAP and Philly Food Bucks received 7 responses while FMNP received none. The following comment was left regarding this question on the survey:

“I am not eligible for SNAP/Food Bucks, but my friend uses that double-bucks program for her large family, and it's *wonderful*. I am very, very grateful the program is being used so low-income families can access organic whole foods.”

Comments

Overall, many of the comments expressed positive attributes of the farmers' market in their neighborhood. Here are some examples:

"No irradiated food, pesticides, herbicides, or genetically - modified food at the farmer's market! Best place to know where the food actually comes from and how it's produced."

"I really like meeting the farmers and buying their food. The prices are generally pretty good, too. For example the \$3 eggs I get at the farmer's market are often better than the \$5.50 eggs at places like the [name removed] Co-op or the [name removed] Farmstand. All in all I am very thankful for the market."

"I moved to Phila in 1999 and wondered where people got their food from - and now I am SO GLAD that there are more healthy options! Thank you!"

"I usually get things at the Farmer's Market that I can't get elsewhere (i.e. special baked breads, fancy tomatoes or fruit, locally produced cheeses/jams), but I only shop there occasionally and only get a few items. I would go more often (quality is good, very convenient location, it is actually fun to walk around and see what they have) if it were not prohibitively expensive – some things are even cheaper at [a high-end grocery store chain]."

"I am fortunate to have such a great market close to my residence. Not only do I buy food for myself, I often shop for friends."

"We are motivated to buy at farmers' markets because we "trust" the food more, to be of high quality and better for us, and also to some degree out of social responsibility. I also thoroughly enjoy the interaction with the farmers, and the natural influence that's there because of the human contact, from both sides. We hope the prices will be able to decrease as more and more people take advantage of the opportunity to shop at the [farmers' markets]."

Alluded to in the last quote above was also the most oft-cited negative characteristic of a farmers' market: the generally higher prices. Other thoughts respondents shared referred to the seasonal nature of farmers' markets, the sometimes-unreliable quality or freshness of some produce, and the oftentimes inconvenient hours or locations of farmers' markets in general. With most farmers' markets operating only once a week for a few hours (with some exceptions), many residents who might otherwise patronize such markets are unable to due to their conflicting schedules.

"I prefer Organic options. The one closest to Manayunk/Roxborough is very limited. I also love Amish produce because it's without pesticides. There's a huge problem in Manayunk/Roxborough trying to get fresh produce. For a neighborhood that pushes local business owners you'd think they'd beg local farmers and healthy food businesses to set up here."

"[I] would be happy to buy more if prices were more competitive."

"I wish things weren't so expensive. Also can't always count of them having what I plan on buying. Still, think they are a great idea. [I] would go more if I didn't frequently work on Saturdays."

"[I] joined a CSA this year. Good veggies and tends to be less expensive than the farmers market."

Some respondents interestingly alluded to a hierarchy of their preferred fresh produce sources. Those respondents who had a CSA share noted that they go to the farmers' market much less than they would if they did not have a CSA share, particularly because of the variety and the lower cost that a share in a CSA provides. In fact, preference for farmers' market produce—or farmers' market shopping in general—was subordinate to CSAs, produce from certain co-ops, and produce that is either self-grown or grown at a community garden.

A few participants provided some suggestions:

“I would love it if there was locally caught fish at my local farmers market.”

“I think a lot more could be done to promote the center city farmers markets among commuters like me. I tell all of my colleagues and even got a list of nearby seasonal farmers markets published in our employee newsletter last year. You'd be shocked how many [folks] do not know these markets exist! Maybe you can partner with some major downtown employers to get the word out to their employees.”

In all, the additional comments reflected an appreciation for the concept of the farmers' market, but cited several inefficiencies that caused them to shop elsewhere for food and produce.

Copyright © Mahbubur Meenar