

Garfield Park Farmers

Market Promotion Initiative

Market Research Key Findings Report

September 30, 2016

Deardorff

Executive Summary

Farmers markets have become a significant element of our nation's economy, food system and communities. Farmers markets link rural to urban, farmer to consumer, and fresh ingredients to our diets, and provide individuals with a setting to engage and form a connection with their communities.

The following report provides analysis of the market research conducted on the New Castle County Farmers Market Promotion Initiative for the Garfield Park location.

Qualitative market research was conducted with members of the Garfield Park neighborhood as this is the primary audience the Farmers Market serves. The research method was designed to elicit feedback on food shopping behaviors, current market awareness, successes and challenges, methods of communication, community value and relocation interest. The market relocation is planned for Spring 2018, when construction of a new community library is complete.

Research found that overall the community has low awareness of the Farmers Market, its mission, and specifically what it offers. In addition, the current location poses some challenges for New Castle County, as it limits the customer base to those within the surrounding neighborhood.

Specifically, the research yielded the following key findings:

- The Garfield Park Farmers Market struggles with a lack of visibility from the main roadways as well as within the park. The neighborhood's structural composition acts as a natural barrier, and therefore reduces opportunities to attract passersby. A more aggressive, vibrant and engaging signage and promotional strategy could increase attendance.
- There seems to be some disengagement among the community and the services/facilities offered by the County, including the Farmers Market. Traffic in and around the Lending Library and Police Athletic League (PAL) is currently slow, and could suggest that the neighborhood is not interested, or that the offering is not meeting the overall needs of the audience.
- Price is a major factor for this audience when it comes to food shopping. However, the majority of respondents were unaware that the market accepts SNAP/EBT. Greater promotion of this capability could raise attendance and ultimately lead to the market being a reliable source of certain types of food.
- Surprisingly, lack of variety was not a reason for the respondent's lack of attention and/or interest in the market. Respondents cited no awareness and inconvenient market hours as the reasons. In addition, the market's hours of operation changed in the past year, which could be contributing to the lack of awareness.
- A comprehensive event strategy and promotional plan need to be developed for the market season to provide an opportunity to truly engage the community. Initially, combining the Farmers Market with a larger community event that offers more than goods and music could help a draw crowd and provide an introduction to the market.
- Respondents indicated an interest in the relocation of the Farmers Market to Route 9. To ensure a seamless transition in 2018, an integrated marketing initiative should be developed and implemented to inform and promote the market and its full offering.

Research Methodology

OVERVIEW

Deardorff, in partnership with New Castle County, conducted onsite qualitative market research in September 2016 on the New Castle County Farmers Market Promotion Project for the Garfield Park location. Currently, the Garfield Park Farmers Market occurs every Wednesday from 3 p.m. to 7 p.m. during May through October.

The purpose of this research was to gain insight on food shopping behaviors, the community's perceptions of the current market at Garfield Park, and also to gauge interest in the relocation of the market to Route 9. Relocation to Route 9 would allow market patrons to benefit from other County services/facilities, including a new community library which will be completed in 2017. New Castle County will utilize the following survey results to help inform the market structure and offerings once it has relocated.

SURVEY DESIGN

Working in partnership with New Castle County, Deardorff developed a qualitative questionnaire with the goal of learning how best to improve the Garfield Park Farmers Market. The survey instrument included questions on demographics, buying behaviors, attendance, awareness, methods of communications and market relocation.

The survey was designed to be effective when used to conduct intercept surveys in the Garfield Park neighborhood, specifically at the Garfield Park Lending Library, the PAL and the Farmers Market. Intercept surveying allowed for the collection of real-time responses – when community members were utilizing the neighborhood's other community offerings and when current patrons were most engaged in the market experience.

The survey developed for the intercepts included both multiple choice and open-ended response questions. Appendix A contains the final survey instrument.

RESEARCH EXECUTION

Surveying was scheduled to coincide with the Garfield Park Lending Library and the PAL's busiest hours of operation, as well as during one market day. Surveying was completed on the following days:

- Thursday, September 1, 2016
- Wednesday, September 7, 2016
- Thursday, September 8, 2016

To conduct the intercept surveying, representatives from Deardorff distributed surveys individually on clipboards to willing community members. Participants completed the surveys themselves, and Deardorff representatives collected the completed questionnaires.

Over the course of the three-day research timeframe, Deardorff approached and encouraged participation of 41 individuals. 16 of those individuals agreed to participate and completed the survey.

Initially, Deardorff planned to field the survey over two days; due to the low response, a third day was added.

During data collection, Deardorff faced additional challenges that resulted in a low response rate. Even during the busiest hours of operation, the Garfield Park Lending Library and PAL were sparsely populated. The majority of individuals available for surveying in the neighborhood were children. Parents picking children up at the PAL did not get out of their cars and were in a hurry to get home. The Farmers Market on Wednesday, September 7 featured one vendor and one musician, and attracted less than 10 customers.

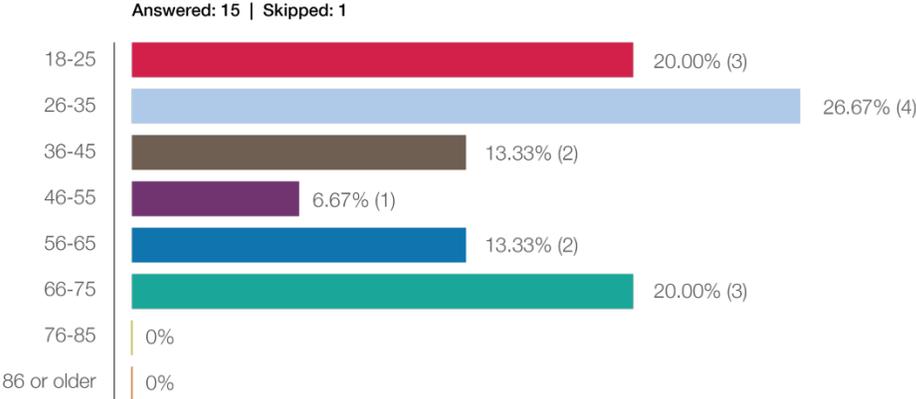
RESEARCH TABULATION

Upon completion of intercept surveying, questionnaires were counted, collated and analyzed by representatives from Deardorff. The following pages summarize the collected data and provide a detailed question-by-question analysis of the participants' responses. In some cases, total *Answered* does not equal 16 due to respondents skipping questions.

Detailed Findings

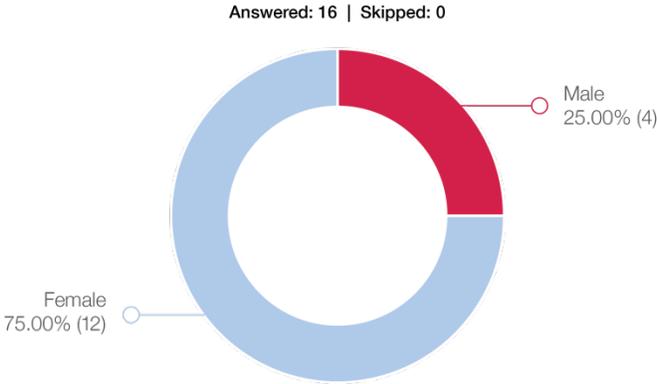
1. Please select your age range.

The sample population included individuals from all age groups, but did skew slightly younger with almost half of the respondents (46.67%) age 35 or younger. The breakdown is as follows:



2. Please select your gender.

Female respondents comprised 75% of the sample population.

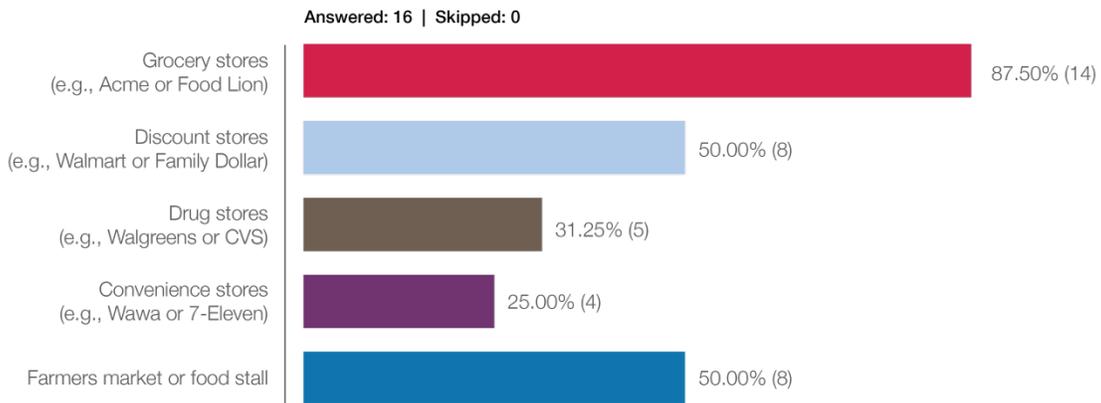


3. Where do you currently shop for groceries? [Rank the top 3, with 1 being where you shop the most.]

During the surveying, Deardorff received a number of questions regarding how to rank the options. Therefore, the ranking may or may not have significance. In order to understand the sample’s food shopping behaviors, Deardorff focused on how frequently an option was selected vs. the ranking.

The majority of the respondents (87.50%) shop for food at grocery stores. Discount stores and farmers markets or food stall were equally indicated second by respondents.

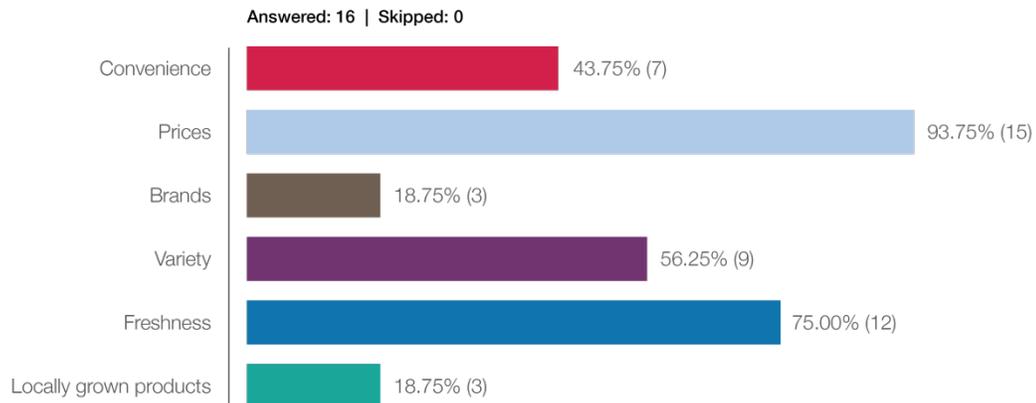
It is significant to note that convenience stores were selected the least by respondents (25.00%). Prior to market research, it was hypothesized that the majority of the population in this area completed the majority of their food shopping at local convenience stores, hence the need to provide access to fresh, locally grown fruits and vegetables.



4. When you food shop, what is important? [Check all that apply.]

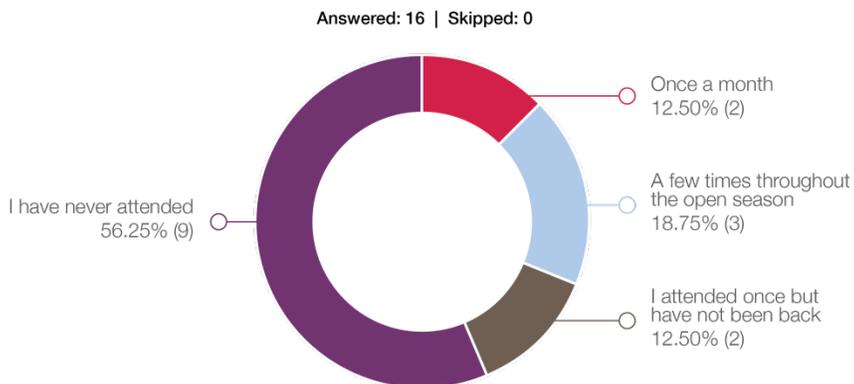
Overwhelmingly, 93.75% of respondents indicated that prices are important. 75% said freshness is important; 56.25% look for variety; 43.75% feel convenience is important; and 18.75% said brand and locally grown products are important.

Interestingly, market research conducted at the Glasgow Park Farmers Market in October and November of 2015 revealed that its customers value freshness over price, brand, variety and convenience.



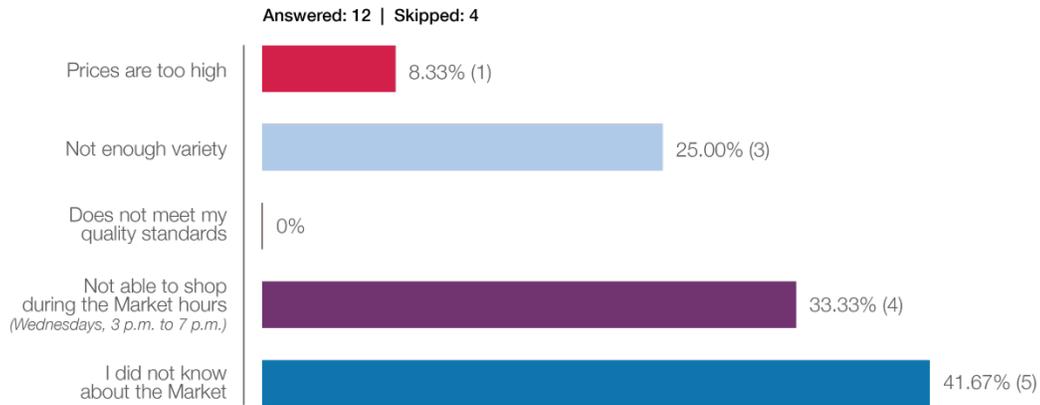
5. How frequently do you attend the Garfield Park Farmers Market?

More than half of the respondents (56.25%) indicated that they have never attended the Farmers Market, followed by 18.17% that attend a few times throughout the season. The Garfield Park Farmers Market season for 2016 was May 6, 2016 to October 31, 2016.



6. If you only attended the Farmers Market once, or have never attended, please let us know why. [Check all that apply.]

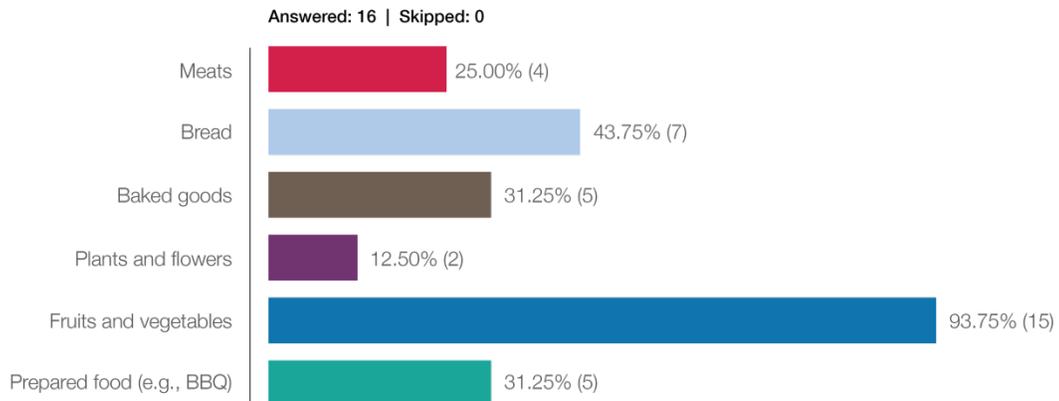
Of the 12 respondents who attended the Garfield Park Farmers Market for the first time or have never attended, 41.67% (5 respondents) indicated that they did not know about the market, while 4 respondents indicated they couldn't attend due to the timing of the market. 3 respondents said the market did not have enough variety; 1 said that the prices were too high.



These findings are extremely significant, as it suggests that lack of promotion and operational misalignment (market hours) are key contributors to low attendance.

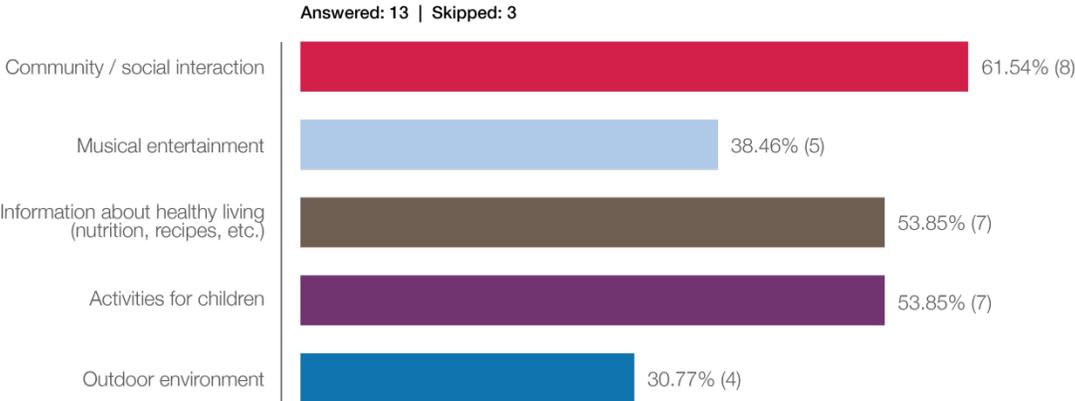
7. What types of food and goods would you most like to see at the Garfield Park Farmers Market? [Check all that apply.]

A majority (93.75%) of the respondents would like to see fruits and vegetables at the Farmers Market; 43.47% would like to see bread; 31.25% would like to see baked goods or prepared food; 25% would like more meats, and 12.50% would like to see plants and flowers.



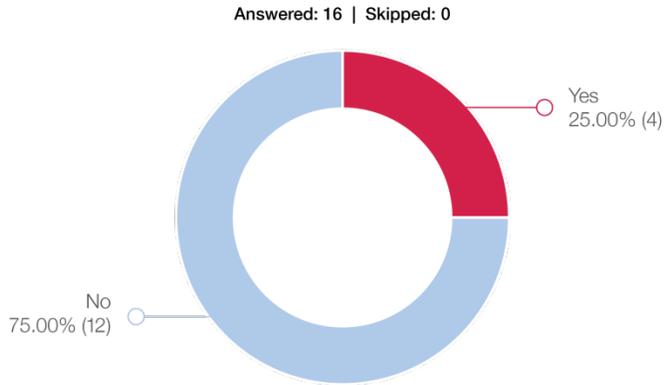
8. What are some other reasons you would come to the Garfield Park Farmer's Market? [Check all that apply.]

The most highly rated reason for attending the Farmers Market was Community/ Social Interaction with information about healthy living and Activities for children rated next at 53.85%. Other responses included Musical Entertainment (38.46%) and Outdoor environment (30.77%).

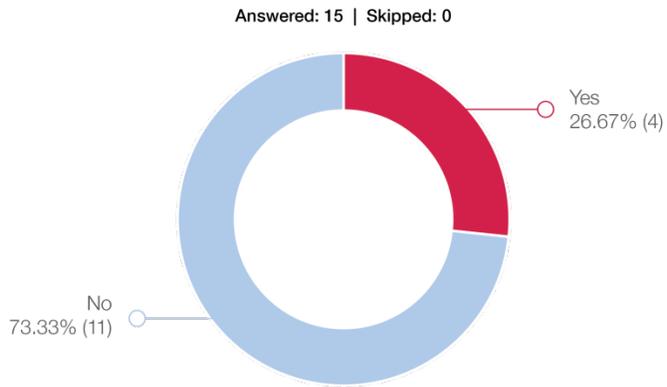


9. Are you aware that the Garfield Park Farmers Market accepts SNAP/EBT?

An overwhelming number of respondents (12) was not aware that the Farmers Market accepts SNAP/EBT.

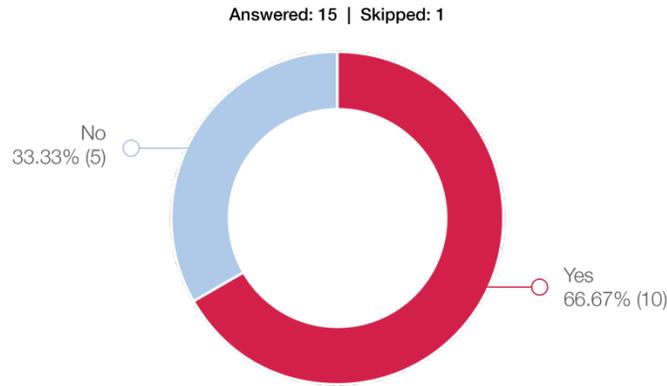


Cross tabulation shows that of the respondents who said prices were important when they food shop, 73.33% did not know that Garfield Park accepts SNAP/EBT.



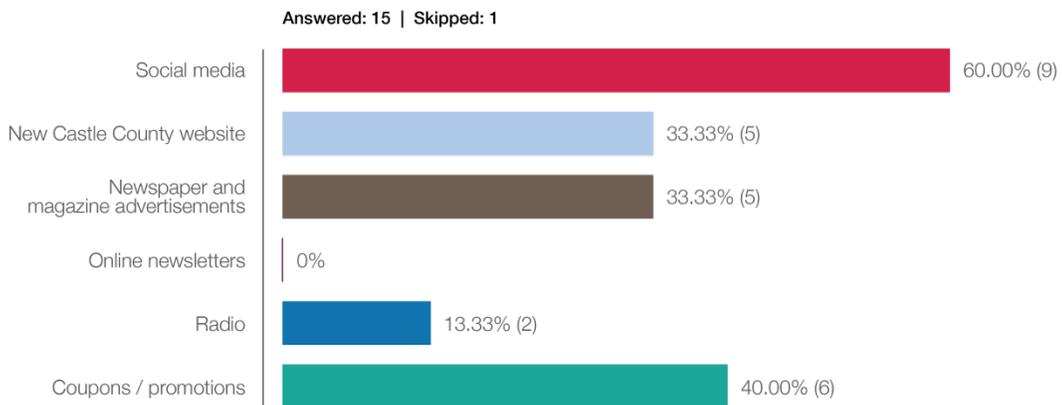
10. Have you ever seen or heard any advertisements or signage for the Garfield Park Farmers Market?

Those who had seen signage, had seen it almost exclusively at the Lending Library and only because they worked there. One respondent had seen signage on Route 9 and 13.



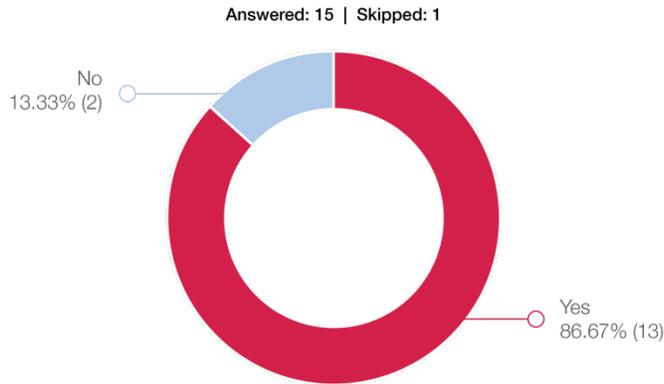
11. How would you like to learn more about the Garfield Park Farmers Market?

The majority of respondents (60%) indicated that they would like to learn more about the Farmers Market through Social media updates. In addition, 40% of respondents are interested in Coupons/promotions, which is consistent with the respondent population rating price as the most important factor. 35.33% would like information posted to the New Castle County website; and 33.33% would like to see print advertisements. Radio and online newsletters the least popular methods selected, at 13.33% and 0%, respectively.



12. Would you visit a farmers market located on Route 9 (near Bowlerama)?

The majority of respondents (86.67%) would attend a farmers market located on Route 9 near Bowlerama. Those respondents who indicated that they would not attend stated that they did not have enough time for farmers markets or was not familiar with the location referenced.



An opportunity was given to provide additional feedback regarding the current Garfield Park Farmers Market and a possible relocation. Only two respondents answered and provided the following input:

“I work at the Garfield Park Library, and I liked the prepared food because I could buy something for my dinner when working.”

“We would love to have the BBQ vendor back.”

VENDOR PERSPECTIVE

Deardorff researchers had the opportunity to speak with the vendor at the Market on September 7 to understand the vendor perspective. The vendor stated that it had been a slow summer and referred to this particular market as “hit-or-miss” for customers in comparison to the other New Castle County Farmers Markets at Rockwood and Glasgow. He shared that he was often asked for often got asked for prepared food by customers, however, due to his business capabilities and licensing limitations, he is unable to provide that service.

APPENDIX A



New Castle County wants your views on how to improve the Garfield Park Farmers Market.

Please note that your comments will be kept confidential. We thank you in advance for your time.

Please include your email address to receive Garfield Park Farmers Market news and promotions:



- 1. Please select your age range:
 - 18-25 26-35 36-45 46-55
 - 56-65 66-75 76-85 86 or older
- 2. Please select your gender:
 - Male Female
- 3. Where do you currently shop for groceries?
[Rank the top 3, with 1 being where you shop the most]
 - ___ Grocery stores (e.g., Acme or Food Lion)
 - ___ Discount stores (e.g., Walmart or Family Dollar)
 - ___ Drug stores (e.g., Walgreens or CVS)
 - ___ Convenience stores (e.g., Wawa or 7-Eleven)
 - ___ Farmers market or food stall
 - ___ Other: _____

- 8. What are some other reasons you would come to the Garfield Park Farmers Market?
[Check all that apply]
 - Community/social interaction
 - Musical entertainment
 - Information about healthy living (nutrition, recipes, etc.)
 - Activities for children
 - Outdoor environment

- 4. When you food shop, what is important to you?
[Check all that apply]
 - Convenience Variety
 - Prices Freshness
 - Brands Locally grown products

- 9. Are you aware that the Garfield Park Farmers Market accepts SNAP/EBT?
 - Yes No

- 10. Have you ever seen or heard any advertisements or signage for the Garfield Park Farmers Market?
 - Yes No
 If yes, please indicate where.

- 5. How frequently do you attend the Garfield Park Farmers Market?
 - Every week
 - Once a month
 - A few times throughout the open season
 - I attended once but have not been back
 - I have never attended

- 11. How would you like to learn more about the Garfield Park Farmers Market?
 - Social media
 - New Castle County website
 - Newspaper and magazine advertisements
 - Online newsletters
 - Radio
 - Coupons/promotions

- 6. If you only attended the Farmers Market once, or have never attended, please let us know why.
[Check all that apply]
 - Prices are too high
 - Not enough variety
 - Does not meet my quality standards
 - Not able to shop during the Market hours (Wednesdays, 3 p.m. to 7 p.m.)
 - I did not know about the Market

- 12. Would you visit a farmers market located on Route 9 (near Bowlerama)?
 - Yes No
 If no, why not?

We appreciate and encourage any additional feedback you would like to provide about the current Garfield Park Farmers Market.

- 7. What types of food and goods would you most like to see at the Garfield Park Farmers Market?
[Check all that apply]
 - Meats Plants and flowers
 - Bread Fruits and vegetables
 - Baked goods Prepared food (e.g., BBQ)
