

FARMERS MARKETS
CUSTOMER SATISFACTION
RESEARCH RESULTS

2018



Funding provided through the USDA Federal State Marketing
Improvement Program (FSMIP)

Farmers Market Customer Satisfaction Research Project Results 2018



Photos (L to R): Minneapolis FM – Lyndale, Rochester FM, stock, Bagley FM

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Project Background

This research project was conducted by the Minnesota Grown Program at the Minnesota Department of Agriculture in 2017. Customers were surveyed about their experiences and opinions after they visited one of the **72 participating farmers markets** across Minnesota, the equivalent of **40% of all farmers markets** in Minnesota Grown. Of the participating farmers markets Minnesota Grown staff visited over 30% of participating markets to answer questions and encourage continued market participation in the survey process. A total of **1,420 customers returned surveys**.

Farmers markets eligible for this project were Minnesota Grown members and were recruited through various means including:

- Articles in Member Update, a monthly member newsletter for Minnesota Grown Program members
- Calls to markets to ensure awareness of the opportunity
- Conversations and presentations at association conferences and trade shows
- Emails sent directly to Minnesota Grown members
- Emails via listserves, such as SustAg, etc.
- Word of mouth: A similar survey was conducted in 2012

The Basics

72 participating farmers markets

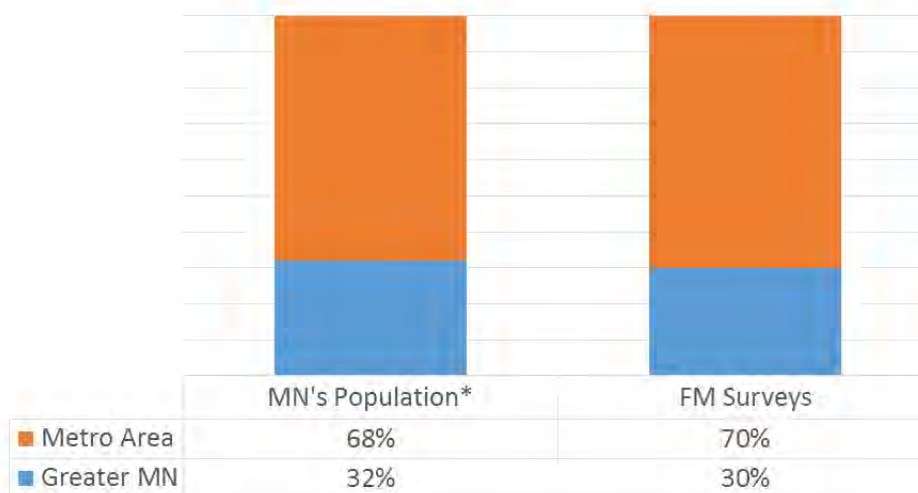
= **40% of all farmers markets** in Minnesota Grown Program

A total of **1,420 customers returned surveys**.



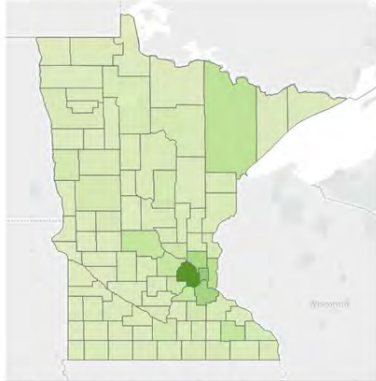
Customers received cards as they made purchases at the farmers markets. Every market had a unique URL and QR code to direct customers to their market’s online survey. They then answered a series of survey questions. The survey was voluntary. A \$25 gift card incentive per market was offered and a winner per market was selected at random. This report is a summary of their feedback across all farms surveyed!

MN’s Population in Comparison with Farmers Market Respondents

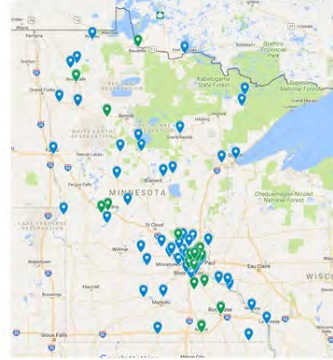


**Source: Census 2010*

MN's Population in Comparison with Participating Farmers Markets



Minnesota's Population*



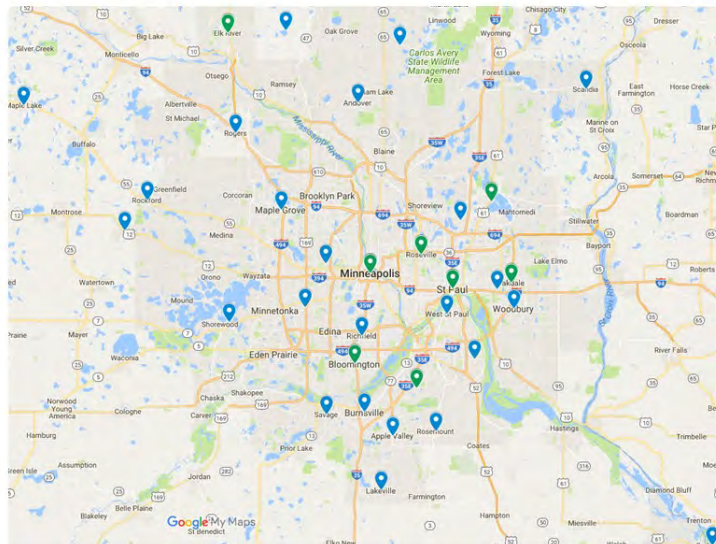
Farmers Markets in Study

**Source: Census 2010*

Markets from Baudette to Austin and many points in between participated in the survey project! We strived for equal representation of the population distributions throughout the state including equal ratios between greater Minnesota and the Metro area.

Minnesota Grown staff completed 20+ market visits (green pins) equal to 30% of the markets in the study. These market visits were to encourage market participation across the state and answer any questions on the spot.

Equal Ratios: Greater MN and Metro Area



Comparison of Greater MN and Metro Customers by Age

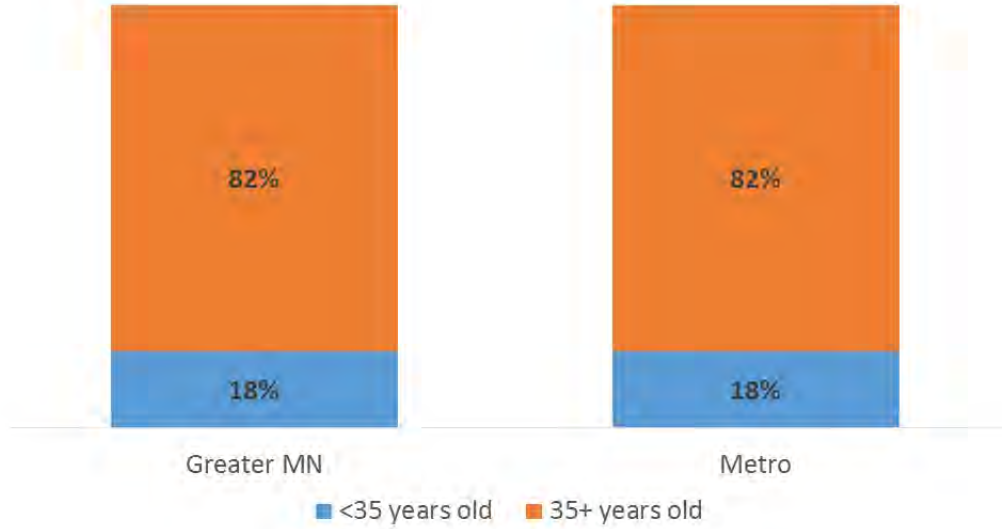
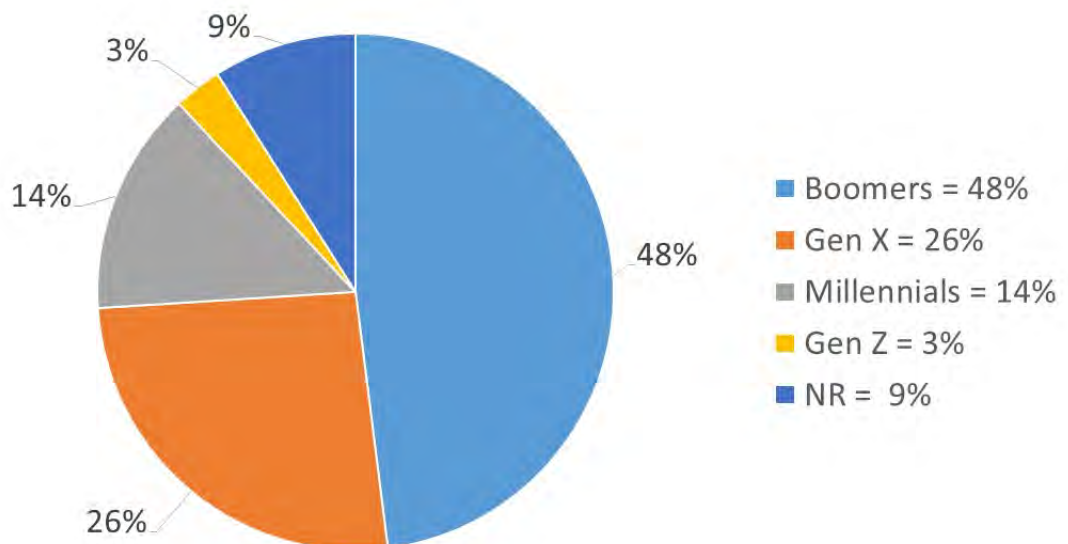


Photo: Thief River Falls FM

Highlights

- Over the past three years 96% of customers are shopping at farmers markets at the same rate or more frequently!
- 85% shop at least weekly at a farmers market.
- About half of customers are long-term farmers market shoppers (10+ years).
- 40% of customers come alone and 44% come with an immediate family member.
- Vegetables and fruit were the most purchased items with a mix of other items filling out the less often purchased items.
- All things considered, 9 out of 10 customers rated their overall experience very highly and 38% felt they had the “best possible” experience.
- Nearly everyone surveyed (90%) will not only return to this market, but recommend it to others.
- Farmers market shoppers are the oldest shoppers in our all of our surveys to date (see below)!

Age Demographics: Generations



Half of farmers market shoppers are Boomers and farmers market customer ages skew towards older adult shoppers.

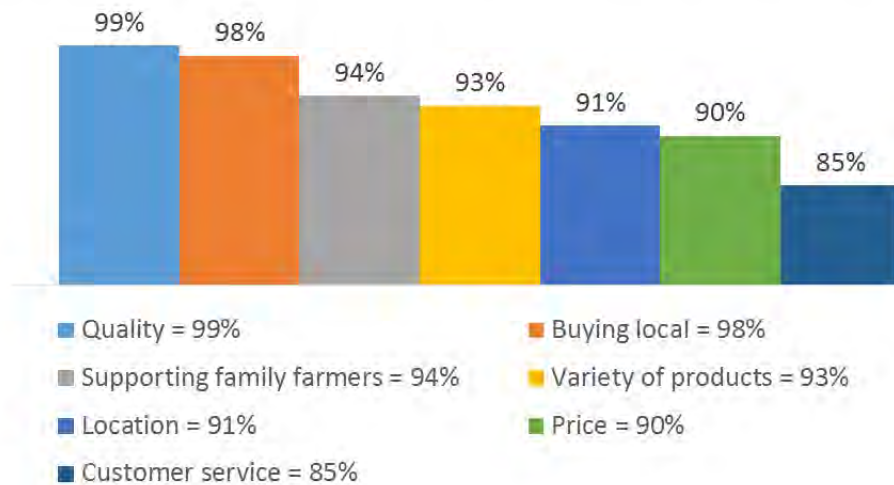
Age Comparisons by Geography

- Farmers market customers' average age Statewide = 51 years old
- In Greater MN = 51 years old
- Metro Area = 52 years old

Age Comparisons by Product (based on [past customer research](#))

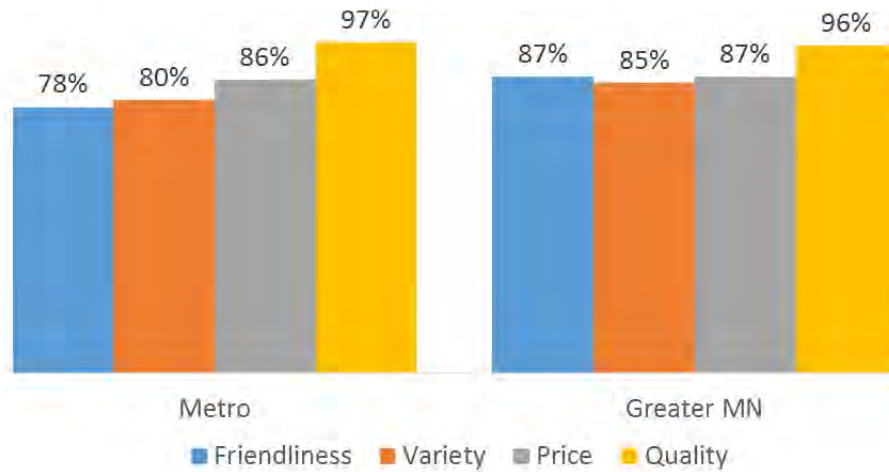
- Farmers markets average age = 51 years old
- Christmas trees average age = 48 years old
- Apples average age = 47 years old
- Berries average age = 49 years old
- CSAs average age = 47 years old

How important were the following in your decision to visit this farmers market today?

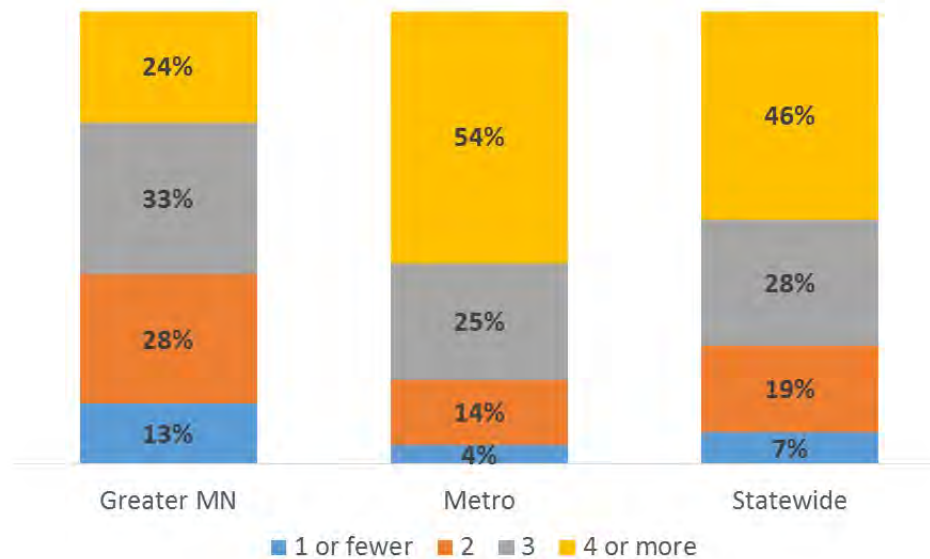


Deciding on Vendors: Metro and Greater MN

Most important factors when choosing between vendors with similar products:



Number of Vendors by Geography



The vast majority of farmers market shoppers buy from three or more vendors. It is interesting to note, in greater Minnesota, 13% shopped one or fewer vendors when they visited the market and may mean they are going to the market for a particular vendor or product.

Customer Quotes

"I do wish there was a wider variety of vegetables to choose from. Most vendors seem to cover the exact same staples – I'd like to see some unusual and/or less popular veggies at the farmers' market!"

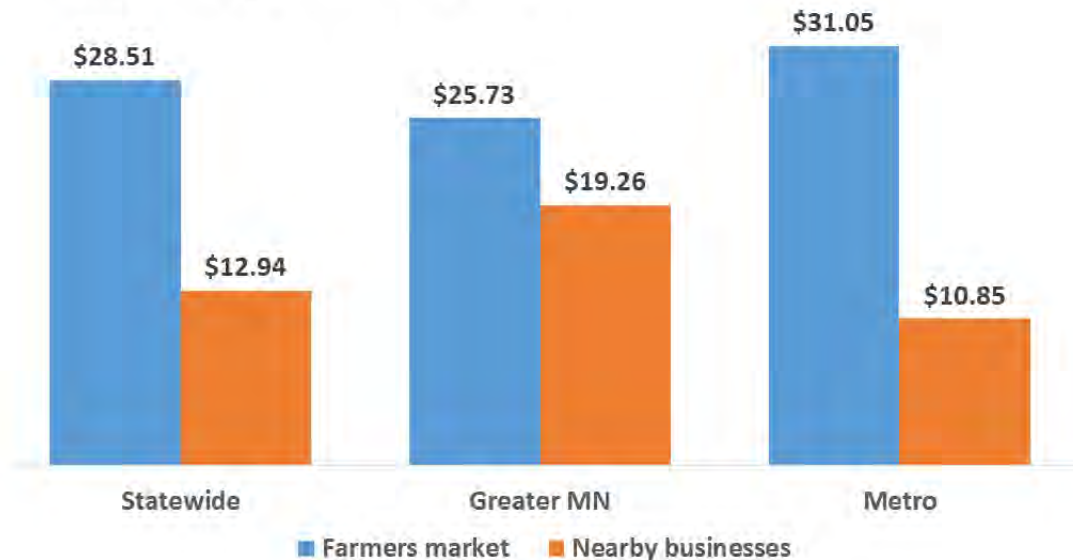
"I found the small number of vendors of vegetables and fruits to be a turn off."

Customers want variety in vendors and products. It doesn't mean you have to grow 30 varieties of lettuce, but people want options. These are only two of the comments about variety and there were many more articulating the same sentiments.



Photo: Roseville FM

Average Sales: Farmers Markets and Nearby Businesses



We know from past farmers market surveys, customers also shop nearby businesses. To reflect the economic impact of having a farmers market in a community, it is helpful to understand how much they spend on average as a result of going to the farmers market.

Average Sales by Age: Farmers Markets and Nearby Businesses

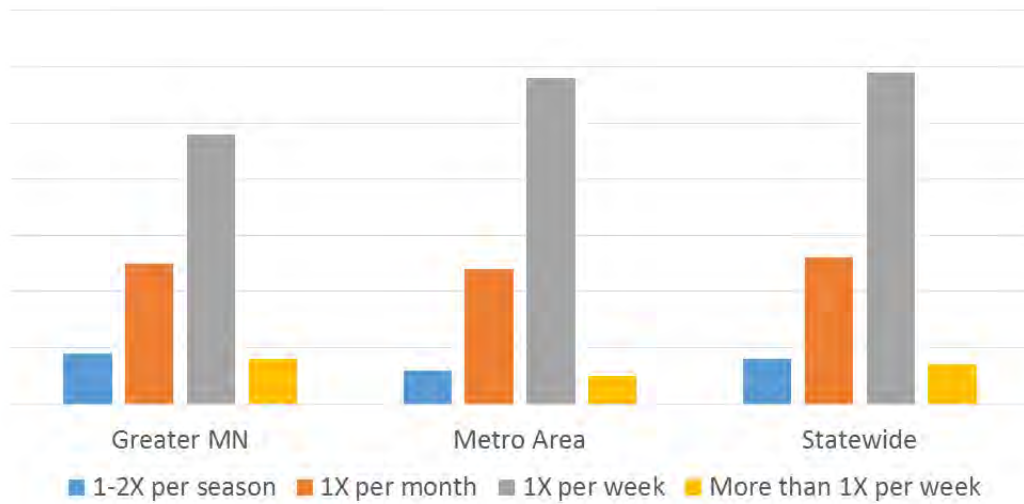


From past research, we know customers also shop nearby businesses when they go to farmers markets. With the average sale significantly lower than farmers markets, what are some of the other businesses they shop? No surprises here:

- Chain / big box stores
- Local stores
- Restaurants / coffee shops
- Gas stations

McDonald's came up quite a bit! This was universal across geographic areas and demographics.

How often do you shop at any farmers market?



Customer Quotes

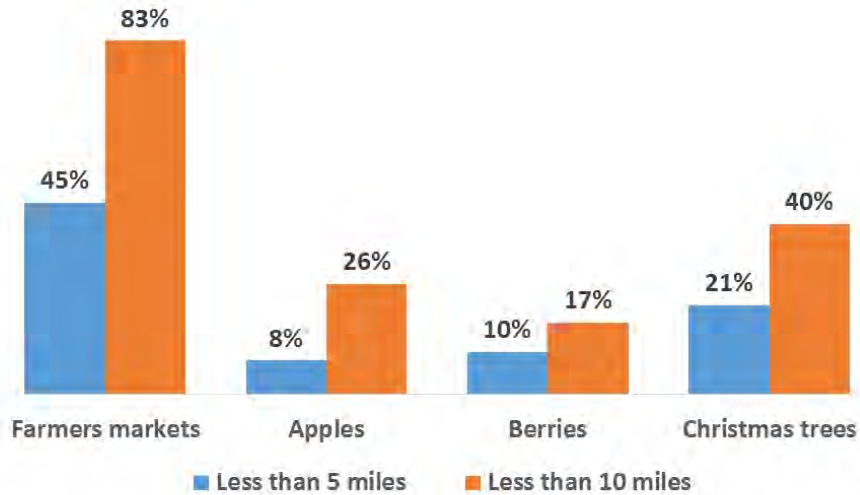
"I stop here weekly and plan to continue. It is close to home, great prices and good, local products."

"I recommend the market to anyone who enjoys local shopping and small town atmosphere."



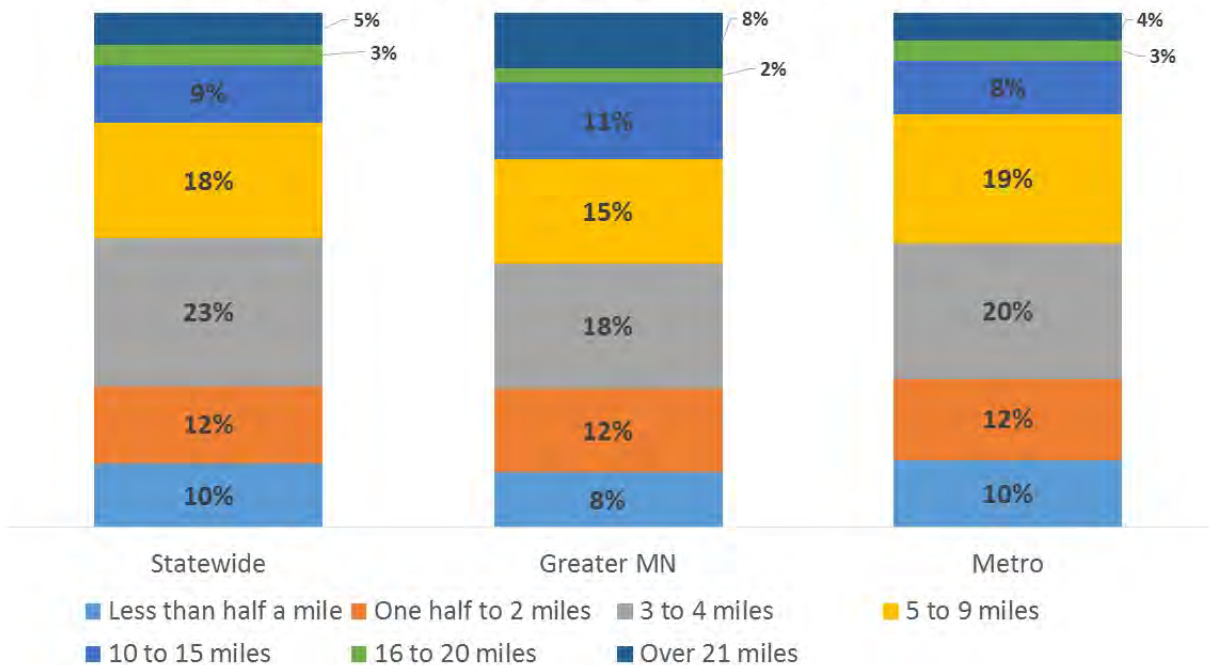
Photo: Riverwalk Market Fair (Northfield)

Distances Traveled (Statewide)



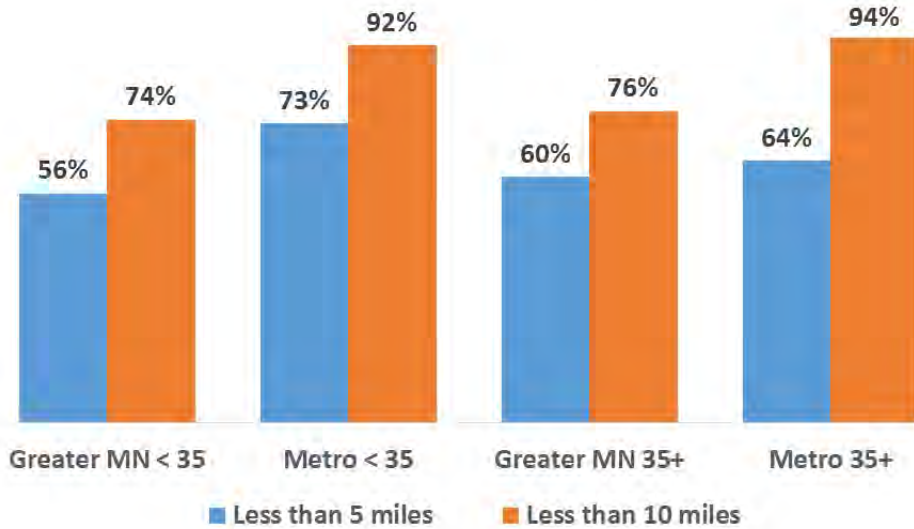
Surprisingly and in comparison to past surveys, farmers market customers typically went to markets less than 10 miles away. This desire to travel shorter distances also remains when the data are split into greater Minnesota and the Metro.

Distances Traveled to Farmers Markets

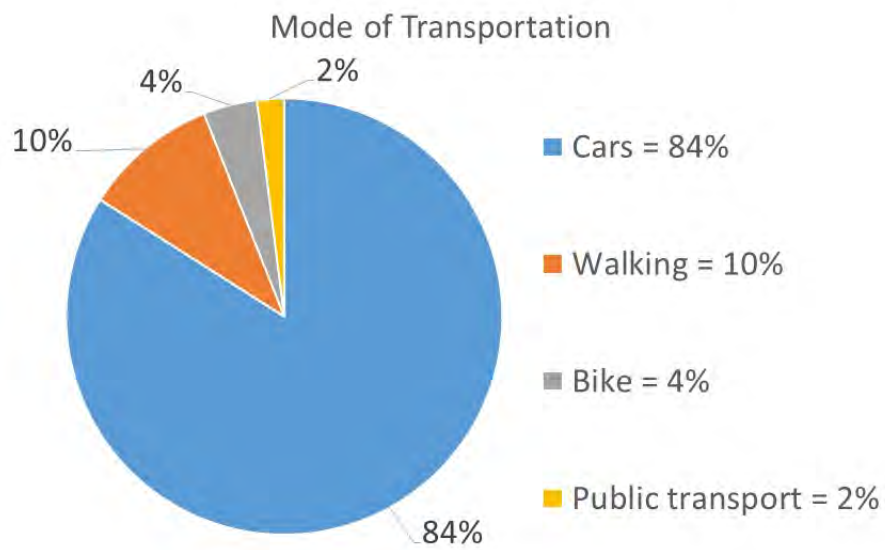


People under 35 tended to be hyper-local with the majority traveling less than 5 miles to farmers markets regardless of whether they are in greater Minnesota or in the Metro area. Of customers under 35 statewide, 69% traveled less than 5 miles and 85% traveled less than 10 miles.

Distances Traveled by Age (Greater MN & Metro)



Transportation to Farmers Markets



Customer Quotes

“Parking is the biggest deterrent to me visiting this market. There have been weeks when there was no parking to be found, so I gave up and didn’t go to the market.”

“The church parking lot where the market is held is way too small for the demand. There are close calls or car crashes on the lot and / or entrance road nearly every week.”

“Parking is terrible and I am handicapped. Unless I get there early I have to carry my purchases a long way back to my car. This limits the amounts I can buy.”

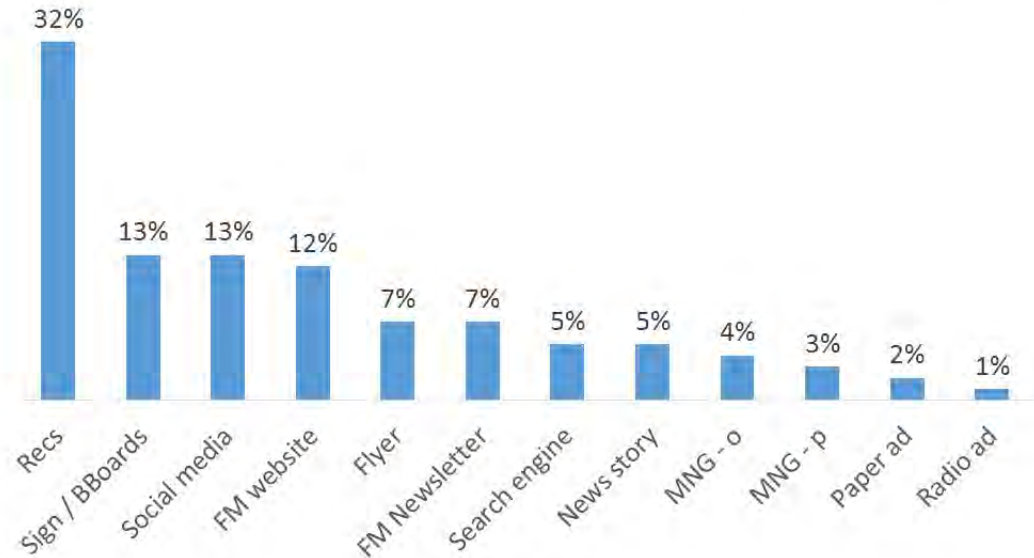
These are quotes from the Cities, the suburbs, and greater Minnesota and are representative of heaps of comments.

The few people who had positive things to say about parking either went to smaller markets (and they said so) or biked to the markets even though only 4% biked.



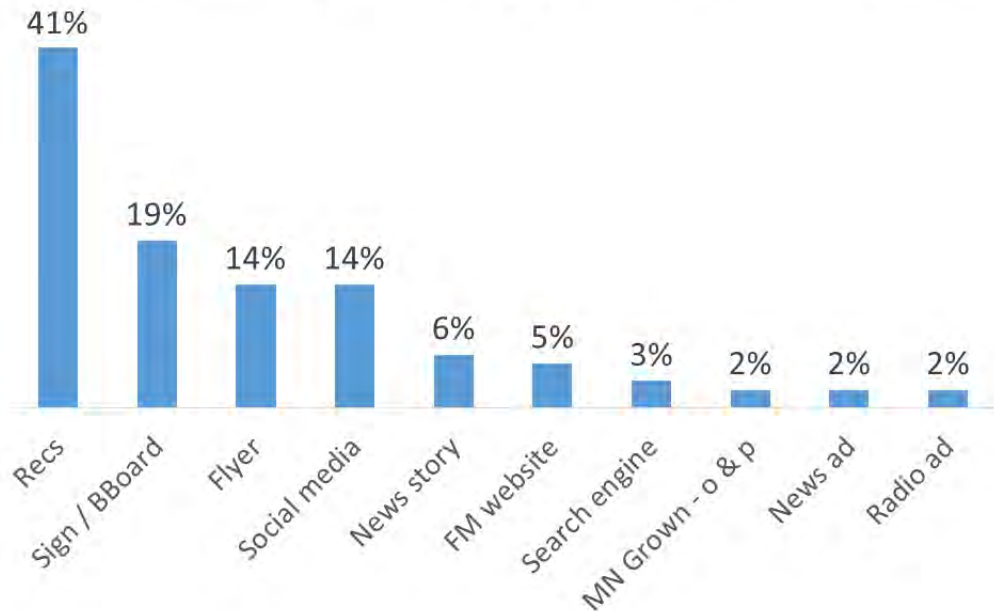
Photo: Alexandria FM

Influencers: How do people hear about markets?



By a wide margin, recommendation from friend or family remains the primary way people learn about farmers markets. Interesting to note is that digital marketing (social media, FM website, search engine, Minnesota Grown's website) account for 34% of the influencers.

What influenced **first year** shoppers to come to this market?



For first year shoppers, recommendation from friend or family is even greater. Digital marketing accounts for 23% of the influencers for first year shoppers.

Customer Quotes

"I have told friends who live close by about the farmers market and how convenient it is with good variety of vendors."

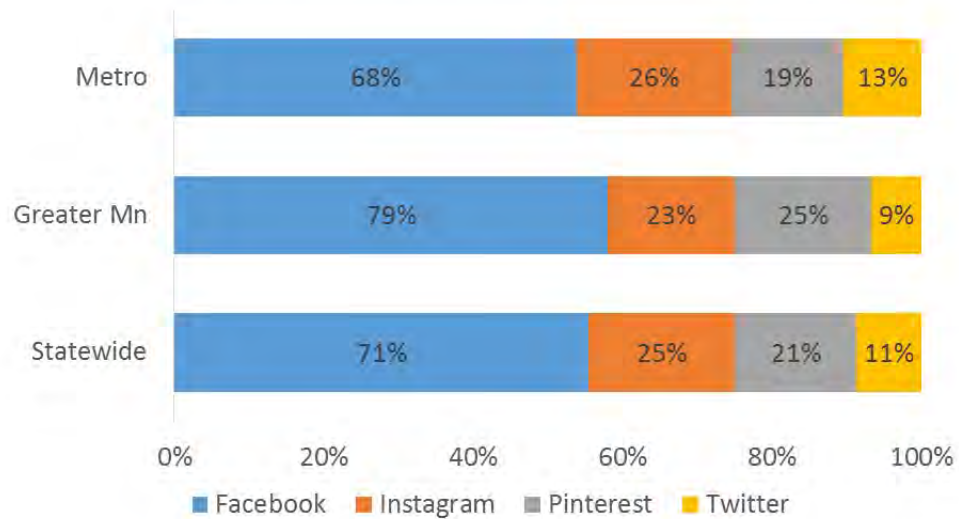
"I bring all of my out of town guests with me so they can see where the food I serve them comes from. I remind neighbors weekly that Tuesday is market day!"

Many markets and vendors have champions – people who are proud to tell others about you!



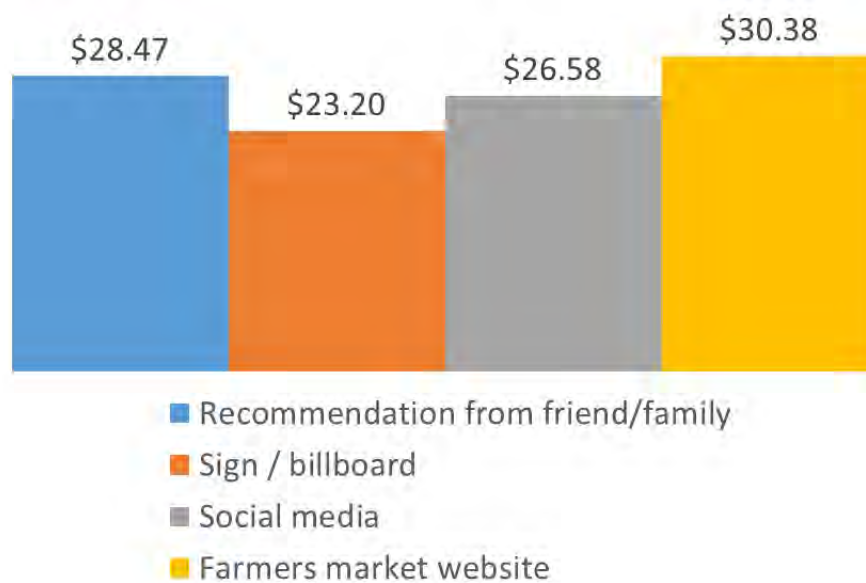
Photo: Holmes City FM

How often do you use the following social media?



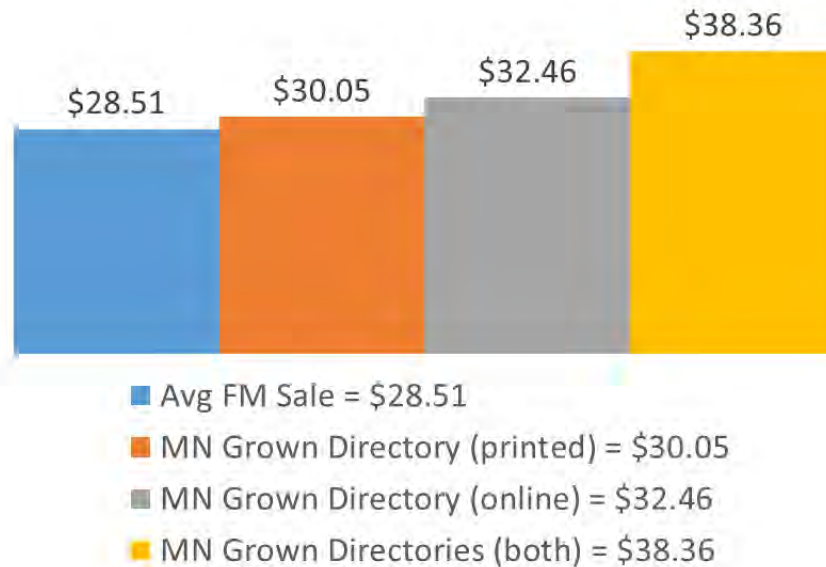
The vast majority of people use Facebook at least daily or more frequently.

Average Sales Based on Top Four Influencers



The top 4 influencers also have good average sale amounts, between about \$23 and \$30.

Average Sales by Influencer: MN Grown



Customers who use both Minnesota Grown directories, spend almost \$10 more on average at farmers markets. Renew or become a member early to ensure being listed in both directories!

Based on customer comments people value:

- Variety (produce and vendors) / Parking / Local goods / Location
- Markets with enough space for people, strollers, mobility challenged, etc.
- More produce and foods, less non-foods and services
- Getting to know vendors, neighbors, and others at the markets
- Allow smaller portions for 1 – 2 person households
- Organic foods
- Not allowing dogs
- Midweek markets / markets more than once per week
- Eliminate using plastic bags
- Recipes / demos of seasonal veggies
- Consider carts for heavy or large purchases/markets especially when parking nearby is an issue

Key Findings

- The majority of farmers market customers are shopping at the same rate or more frequently.
- 85% of customers shop at least weekly at a farmers market and typically have a very good experience doing so.
- Nearly everyone will return and recommend their farmers market to others.
- Farmers market customers are older than any other population we have seen in our Customer Satisfaction Research Projects.
- Customers want quality, to buy local, to support family farmers, and a variety of products when selecting a farmers market.
- Customers want quality, price, variety, and friendliness when deciding between vendors with similar products.
- Quality always tops price – we've seen it in every survey across the board.
- Most customers buy from three or more vendors and in greater Minnesota, 13% may come to the market for a particular vendor or product since they buy from only one vendor.
- Customers at farmers markets also spend a substantial amount of money at other businesses as a result of going to the farmers market.
- Statewide, older customers spend more on average.
- Customers prefer to shop close to home (up to a 10 mile radius) and young customers are hyper-local preferring to travel less than five miles.
- Most people drive cars to the farmers markets and one of the biggest pain points is parking (enough, size, distance from market).
- Recommendations from family or friends remains the biggest influencer across the board.
- The top four influencers are recommendation from friend/family, sign/billboard, social media, and farmers market website.

- Customers who use the Minnesota Grown directories tend to spend significantly more – up to \$10 more per sale on average.
- About two-thirds of customers use Facebook at least daily or more frequently.



Photo: Maple Grove FM

What did farmers market managers say about the survey process?

Feedback from the farmers' markets about the process was generally positive and we learned from them as well. Thank you for your feedback!

Market managers commented on the ease of participation for markets and customers. They particularly mentioned having the process streamlined and simplified for on the ground execution.

Further, feedback from market managers about the process tied into benefits for vendors AND customers, not to mention the markets. There were also unexpected benefits: Connecting with customers, and opportunistic conversations about the markets, hours, etc.

The market visits provided value beyond our learning about the markets - awareness about Minnesota Grown and the benefits of membership increased and people appreciated learning what more we can do for you!

Market Manager Quotes

Easy

"It was awesome to just simply hand out the postcards and be done on the vendor's part."

"The ease of handing out the cards to customers and support that Tina provided."

We have "an older crowd...and I was not sure they were going to have the motivation, knowledge, or incentive to do the survey, but I heard a lot of people saying they took the time to do it."

Vendors & Customers Benefit

"I loved that there are incentives on both ends of the process."

"It helps us to make the farmers' market a better experience."

Unexpected Benefits

"Gave us the opportunity to talk directly to and connect with customers."

"It also opened up conversations about the dates/hours, winter markets, and other random questions."

Market Visits

"It definitely brought awareness to MN Grown, because I had vendors coming up to me afterwards telling me about a lot of great opportunities MN Grown offers for the vendors with memberships. I had no clue about half the benefits, so it was new information for even me!"

"Not all the vendors know what MN Grown is or does...The value is there!"



Photo: Elk River FM

Data Collaboration and Sharing the Information

The aggregate report is posted online and also announced in the Member Update newsletter. Participating farmers markets also received confidential, individual market reports including their summarized, anonymous data and customer comments.

These results were presented at the 2018 Upper Midwest Regional Fruit & Vegetable Growers Conference and the 2018 Northwest Minnesota Farmers Market Meetings. After the presentations, we surveyed the audiences:

96% of growers indicated they would make changes to their marketing strategies based on the information presented as a result of this research.

100% of growers indicated they would like to continue this research in another 4-5 years. Minnesota Grown intends to do so.

Anonymized data sharing and collaboration with select partners is important to help increase statewide demand for growers' products. Collaborative opportunities as a result of this research and with the anonymized data includes collaboration partners across the state:

- Homegrown Minneapolis
- Minnesota Department of Health
- Organics Conference Presenter
- Student Capstone Project

We continue to listen to farmers, markets, producers, and business owners to increase the value of the results. [Contact us if you have any questions about this or other customer satisfaction research projects!](#)

