A Study of Consumers at a Small Farmers' Market in Maine: Results from a 1995 Survey

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This study was based on a survey of customers who shopped at a small farmers' market during the summer/fall market season of 1995. Information from a survey completed by 239 shoppers was used to develop a profile of the primary consumer group, defined as those who shop regularly at the market and spend the most per visit. Comparisons between survey data and census data for the local population showed that primary shoppers at the market had higher education, higher annual household income, tended to be slightly older, and were more likely to be employed women. For the most part, the respondents were loyal, weekly shoppers who patronized the market because of the high quality of the products. Most reported that they were willing to pay more for produce at the farmers' market.

The farmers' market is one of the oldest forms of retailing and has long played a critical role in helping small to mid-sized growers gain access to consumers. State listings of active farmers' markets operating in the US indicate that the number of markets has been on the increase over the past decade. From 1994 to 1996 alone, the number of farmers' markets rose from 1,755 to 2,400, an increase of 20% (Burns and Johnson, 1996). The growing popularity of direct markets reflects the well documented demographic, socioeconomic and attitudinal changes that have taken place in the population over the past several decades. These include the general aging of the population, the trend toward smaller households, increased demand for quality, freshness and "healthy" foods (Food Institute, 1995). All of these factors are related to increased consumption of fresh produce, the featured items at most farmers' markets (Vance, 1996; Smallwood, Blaylock and Lutz, 1994).

In addition to other direct marketing options such as roadside stands and pick-your-own operations, many small producers rely on farmers' markets as their primary sales vehicle. Others use the markets to supplement their incomes, which in many cases enables them to turn marginal operations into profitable ones (Burns and Johnson, 1996). In light of the importance of this marketing channel and trends indicating an increase in patronage of these markets, research about consumers and their shopping patterns can provide valuable insights which vendors can use to improve their marketing tactics.

Background and Objectives

The town of Orono is a small community in central Maine in which the largest campus of the University of Maine system is located. In the summer of 1994, a farmers' market began formally operating out of a University of Maine parking lot adjacent to the campus. It started as an assembly of five vendors who sold products on Saturday mornings, but within a year the number had tripled to approximately 15 at the height of the season. At the same time, patronage at the market had also increased substantially and farmers expanded their business hours to both Tuesdays and Saturdays. The staple items at the market are produce, primarily conventionally grown, but a few farmers feature organic produce. Other vendors add variety to the market by selling baked goods, herbs, plants, fresh turkeys and goat cheese.

To maintain their current customer base and continue attracting new patrons, the farmers wanted information that would help them direct their promotion efforts, allow them to analyze consumer demographics and spending patterns, refine their marketing approach and establish a benchmark for future evaluation. From this gen-

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eral base, the research was designed to address four objectives:

1. Identify the demographic characteristics of consumers at the market.
2. Analyze patronage trends, including initial discovery of the market, frequency and context of visits.
3. Evaluate consumer attitudes toward products they purchased and the market.
4. Analyze consumer purchasing and expenditure patterns.

Methods

Data for this study were collected using a consumer survey with questions pertaining to each of the four objectives. Respondents were asked to provide demographic information, describe how they heard about the market, how often they visited, what they usually purchased and how much they spent. Additional questions asked about their reasons for shopping at the market, satisfaction with products, and how well the market compared to others that respondents had visited. The questionnaire was pre-tested and finalized in May 1995.

The actual survey was conducted from July through October 1995, the peak period for the market season. On each of the two days of operation, Tuesdays and Saturdays, two interviewers approached visitors at the market and asked them to complete a questionnaire. Respondents could return their surveys by placing them in specially marked boxes located beside vendors, or they could return them by mail, postage paid. Altogether, 464 surveys were distributed and a total of 239 unduplicated forms were completed and returned, yielding a response of 52%.

Respondent Characteristics

The demographic characteristics of the surveyed consumers were compared to those of the general population within the surrounding area of Penobscot County. This gave a clearer definition about the market segment that was being served and indicated how typical the respondents were in comparison to the population at large. Comparisons of gender, age, education, household size and presence of children, annual income and employment status among men and women are shown in Table 1.

About 7 out of 10 surveyed shoppers were women. This high proportion of females matches the data reported for supermarket shoppers in general (Food Institute, 1995). Total household size comparisons show similar percentages of those with three or more people, but among the respondent group, the percentage of two person households is higher and the percentage of single households is lower than what would be expected in the general population. The demographic indicator in which the farmers' market base conforms most closely to the local population is the percentage of households with children younger than 18 years old: about 31% in each group.

The age distributions are similar with a few notable exceptions; over 22% of farmers' market patrons were between the ages of 45 to 54, compared to 12% recorded for the local population. Also, the proportion of 65 and older individuals is slightly lower, as is the proportion of young adults, from 17 to 24 years old.

The most prominent distinguishing characteristics of the farmers' market shopper are education and annual household income. More than two out of three shoppers reported having a bachelor's degree or higher level of education in comparison to less than one out of four people in the surrounding population. In the household income category, the proportion of shoppers with incomes of $60,000 was 21%, nearly twice as high as what would be expected on the basis of census data. The comparatively high education and income levels among farmers' market patrons has been consistently noted in most studies of other markets conducted over the years (Govindasamy and Nayga, 1997; Eastwood, 1996; Bierlien, Vroomen and Connell, 1986; Jack and Blackburn, 1984; Kezis et.al., 1984).

Another area of deviation from the local norm is the proportion of working men and women. About 59% of the male respondents said they were employed, compared to nearly 69% listed in the county census data. Alternatively, 64% of the female respondents were employed compared to 58% of the local women. About 34% of respondents were affiliated with the university either as a student or as an employee.

Table 1. Characteristics of Orono Farmers' Market Patrons Compared to General Population in Penobscot County (percent distribution).

Characteristics:	Respondents	Census, Penobscot County 1990
	---------------- percent ----------------	
Sex		
Male	28.7	46.3
Female	71.3	53.7
	(N=230)	(N=32,757; persons 15 yrs +)
Total household size		
1 person	14.9	28.3
2 persons	46.1	34.0
3 persons	14.9	17.5
4 or more persons	24.1	20.2
	(N=228)	(N=15,980 households)
% of households with children younger than 18 years	31.3	31.6
	(N=230)	(N=15,980 households)
Age		
17 to 24	11.4	18.4
25 to 34	24.5	23.9
35 to 44	19.1	18.6
45 to 54	22.3	12.3
55 to 64	11.8	10.3
65 or older	10.9	16.5
	(N=220)	(N=31,812)
Education		
High school or less	12.1	48.7
Some college/tech training	20.9	28.3
Bachelor's degree	31.3	14.8
Advanced/prof. degree	35.7	8.2
	(N=230)	(N=25,964; persons 25 yrs. +)
Annual household income		
Less than $20,000	30.8	37.7
$20,000-29,999	14.7	18.7
$30,000-39,999	15.6	15.9
$40,000-49,999	9.5	10.4
$50,000-59,999	8.1	6.2
$60,000 and over	21.3	11.1
	(N=211)	(N=15,980)
Employment Status of Males & Females		
Males:		
Employed	58.7	68.6
Retired	14.3	26.6*
Student	27.0	*
Unemployed	0.00	4.8
	(N=63)	(N=14,592)
Females:		
Employed	63.8	57.5
Retired	13.8	39.7*
Student	13.2	*
Unemployed	9.2	2.8
	(N=152)	(N=17,274)

*census category denoted as "not in the labor force;" includes students/others not seeking employment

On the basis of this survey information, the typical shopper at the market was a woman, age 35 or older, who was employed, highly educated, lived in a two-person household, had no children at home under age 18, and had a household income of $30,000 or higher. In comparison to the local population in general, she was more likely to be between the ages of 45 to 54 years, to be employed, to have a household income of $60,000 or over, and have an advanced college degree.

Context of Visit to the Farmers' Market

Nearly 3/4 of the 239 respondents had previously shopped at the market on one or more occasions. Of these 178 shoppers, 57% said they typically visited at least once each week throughout the season. Most people mentioned that they usually brought others with them, often a spouse, but also children, other relatives or friends. Only 40% said they ordinarily shop alone. The most popular shopping time was Saturday mornings.

Similar to the findings in other studies, most customers live in close proximity to the market; 75% said that a round trip visit was three miles or less, indicating that the market relies on patronage from the local community. The significance of proximity is further emphasized in noting that over 2/3 said they do not shop at other farmers' markets even though a comparatively large market with two to three times as many vendors is located eight miles south of Orono.

Respondents were asked how they first learned about the market. Just over 50% said they simply came across it when driving by on the road and another 44% said they learned of it through another person. The prominence of these informal methods of discovery has also been noted in other studies (Gallons et al., 1997; Jack and Blackburn, 1984; Kezis et al., 1983).

Purchasing Patterns

For the most part, the featured items at the market were produce, particularly vegetables. But the variety of offerings changed throughout the season and several different venders sold eggs, perennials, herbs, baked goods, goat cheese, pickles and vinegar. To gain a better understanding of demand for particular items at the market, respondents were asked to list products they usually purchased. The top 15 items are listed in Table 2.

Table 2. Most Common Items Purchased From Vendors at the Orono Farmers' Market (percent distribution*).

Item	Percent
Corn	70.6
Cucumbers	63.6
Tomatoes	63.3
Beans	57.1
Apples	53.1
Carrots	52.5
Potatoes	48.6
Blueberries	46.9
Squash	46.9
Broccoli	43.5
Greens	44.6
Peas	42.9
Peppers	42.4
Lettuce	40.0
Strawberries	39.5

*N= 178; excludes those who were shopping at the market for the first time

Corn, cucumbers and tomatoes were the most popular items at the market. In addition to other common vegetable purchases, such as beans and carrots, apples, blueberries and strawberries were among the top 15 products. Respondents were least apt to report buying the specialty products such as flowers, herbs, baked goods, and cheese.

Respondents' Attitudes Toward the Products and the Market

In order for farmers to gain a better understanding of the particular features of their market that gave them an advantage over other shopping formats, those who had been at the market before were asked why they shopped there. Respondents were instructed to review a list and rank the three reasons most important to them. A write-in option was also offered. The results are shown in Table 3.

Quality of produce was consistently mentioned as the key attraction. This response would be expected on the basis of the high education level that characterized these respondents. Consumer studies indicate that increased education tends to produce consumers who are more discriminating in their product selection and more concerned with quality, however individualized their definition of that concept may be (Food Institute, 1995; Vance Publications, 1996).

Table 3. Most Important Reasons for Shopping at the Farmers' Market (percent distribution*).

Reason	Percent
Quality of the products	72.5
Support local farmers	59.6
Friendly atmosphere	38.2
Health & food safety concerns	29.8
Convenience	13.5
Good price	10.7
Variety	8.4
Good service	5.0
Consistency	2.2

*N=178; excludes those who were visiting the market for the first time

One distinction from other farmers' market surveys is the fairly low importance of price. Several studies report that consumers perceive price as another critical factor in their decision to shop at the market (Gallons et al., 1997; Eastwood, 1996; Jack and Blackburn, 1984). In this study, only 11% listed it as important. Instead, nearly 60% ranked support for local farmers as a major consideration and 38% cited the friendly atmosphere of the market. The importance of these reasons in the minds of consumers points to the relevance of Eastwood's suggestion that promotion efforts should emphasize the market experience so that shoppers will be inclined to view the trip itself as an added value (1996).

Table 4. Respondents' Willingness to Pay More For Produce at the Farmers' Market Compared to Produce at the Supermarket.

Willingness to pay more for farmers' market produce.	Percent
No	28.0
Yes	72.0
Total	100.0
	N=167
Average percent more that respondents would be willing to pay.	17% (SD=10%) N=120

To further investigate customer attitudes about the pricing of products at the market, respondents were asked if they would be willing to pay more for conventionally grown produce at the farmers' market compared to the produce at the supermarket. These results are in Table 4. Close to ¾ of the sample said they would pay more for produce at the farmers' market compared to conventionally grown produce sold at the supermarket. Moreover, the higher price they are willing to pay is substantial; the average amount was estimated at 17%. This indicates that patrons at this market do not appear to be bargain hunting.

Since the farmers were interested in how their market measured up to others, respondents were asked to evaluate certain characteristics of the Orono Farmers' Market in comparison to other markets they had ever visited. Eight comparison statements about the market were listed and for each one, respondents indicated their level of agreement with the statement. These results are in Table 5.

Table 5. Respondents' Evaluations of Orono Farmers' Market Compared to Other Farmers' Markets.

Comparison Statement	Yes	No	Same	Don't Know
	--------percent--------			
More convenient location	67.4	2.8	12.1	17.7
Better atmosphere	40.5	6.9	32.8	19.8
Better variety	20.8	32.3	25.4	21.5
Better quality products	18.5	3.8	53.8	23.8
More consistent hours	16.8	12.0	35.2	36.0
More ads & promotions	9.5	19.0	14.3	57.1
More consumer activities	10.8	24.2	20.0	45.0
Better prices	7.0	13.3	35.9	43.8

N=232

The Orono market drew the most favorable evaluations for location and atmosphere in comparison to others. This would be expected since the previous data showed that most respondents lived in close proximity to the market. The variety of produce did not measure up to other markets according to 32% of respondents while over half thought the variety was equal to or better than at other markets. For other comparison statements, the largest percentage checked "don't know," especially when asked to compare ads and promotions, and consumer activities. Interestingly, 43% did not know how prices measured up to other markets. This lack of knowledge further suggests that price is not a key consideration in the decision to shop at the farmers' markets.

Analysis of Respondents' Patronage and Spending Patterns

One important objective was to acquire data about the incidence of patronage and the amount customers spent at the market. The intent was to analyze variations in shopping trends and determine which variables correspond to a greater likelihood of regular, active patronage, defined in terms of shopping frequency and amounts spent during a typical visit. This would add to an understanding of the customer base to which the market appealed.

One question of interest was whether frequent shoppers were actually making purchases, or if they tended to simply browse. Table 6 presents data on the relationship between shopping frequency and the amount spent during a typical visit. Those who patronize the market most often also tended to report spending the highest amount per visit. Nearly half of those who shop weekly said they usually spend about $10.00. In contrast, those who shop once a month or less were inclined to spend the least at each visit. This indicates that the regular patrons are also contributing the most business to the vendors.

Table 6. Typical Amount Spent Per Visit Based on Frequency of Shopping at the Farmers' Market.

Average amount spent per visit	Shopping Frequency: Monthly or less often	About every two weeks	At least once a week
	-----percent-----		
Less than $5.00	23.3	22.7	12.0
$5.00-$9.99	63.3	52.3	41.0
$10.00 or more	13.3	25.0	47.0
Total	100.0	100.0	100.0

N=174 Chi-Square=14.9 p=0.005

Since the University offered a broad base of potential customers, one hypothesis was that University affiliates, both students and employees, were more apt to visit the market regularly. Their visitation frequency and spending habits were compared to other customers who had no formal affiliation with the University. These data are in Table 7 and 8.

The results indicate that there are no differences between the three groups regarding the frequency of shopping. However, University employees are inclined to spend the most per visit; half estimated that their typical transaction was $10.00 or more, compared to about 1/3 of those not affiliated with the University who spend this amount. Student spending accounted for the biggest difference between groups; none of them reported spending $10.00 or more per visit.

Table 7. A Comparison of Shopping Frequency Based on Affiliation with the University.

Frequency of Shopping	University Affiliation: Employee	Student	No Affiliation
	---percent---		
Monthly or less often	14.3	19.1	16.8
About every two weeks	26.5	23.8	26.7
At least once a week	59.2	57.1	56.4
Total	100.0	100.0	100.0

N=171 Chi-square=0.34 p=0.99

Table 8. A Comparison of Spending Patterns Based on Affiliation with the University.

Average amount spent per visit	---- University Affiliation ----: Employee	Student	No Affiliation
	--------percent--------		
Less than $5.00	8.0	40.0	13.9
$5.00-$9.99	42.0	60.0	50.5
$10.00 or more	50.0	0.0	35.6
Total	100.0	100.0	100.0

N=171 Chi-square=20.96 p=0.00

Other variables were investigated for a possible connection to shopping frequency and spending variations. These included town of residence, age of respondents and annual household income.

Town of residence was categorized into two groups; those who lived in Orono and those residing in all other areas, primarily the neighboring towns. In Table 9, the data show that Orono residents visited the market more frequently than other customers and that this difference is significant. However, there were no significant differences between the two groups concerning the amount they report spending on a typical shopping trip (Table 10).

Table 9. A Comparison of Shopping Frequency Between Respondents Living in Different Towns.

Frequency of Shopping	Residence: Orono (site of market)	Other Towns
	--------percent--------	
Monthly or less often	11.6	26.6
About every two weeks	27.7	21.9
At least once a week	60.7	51.5
Total:	100.0	100.0

N=176 Chi-square=6.48 p=0.04

Table 10. A Comparison of Spending Patterns Between Respondents Living in Different Towns.

Average amount spent per visit	Residence: Orono (site of market)	Other Towns
	--------percent--------	
Less than $5.00	16.1	17.2
$5.00-$9.99	47.3	48.4
$10.00 or more	36.6	34.4
Total	100.0	100.0

N=176 Chi-square=0.98 p=0.95

The comparisons of shopping and spending differences based on age are in Tables 11 and 12. Shopping variations are statistically significant, with the oldest respondents, age 50 and over, most likely to be weekly shoppers. Those under age 30 were more inclined to shop at the market monthly or less often in comparison to those in the two older categories. Yet, spending differences between age groups are not as pronounced (p=0.07). In this comparison, about twice as many of the youngest respondents said they typically spend less than $5.00 compared to the middle age and the oldest respondents. These older respondents were more likely to report spending $10.00 or more.

Table 11. A Comparison of Shopping Frequency Between Respondents in Different Age Categories.

Frequency of Shopping	Age Groups: Less than 30	30-49	50 or older
	-----------percent---------		
Monthly or less often	33.9	11.1	8.3
About every two weeks	24.5	30.2	21.7
At least once a week	41.5	58.7	70.0
Total	100.0	100.0	100.0

N=176 Chi-square=17.78 p=0.001

Table 12. A Comparison of Spending Patterns Between Respondents in Different Age Categories

Average amount spent per visit	Age Groups: Less than 30	30-49	50 or older
	-----------percent-----------		
Less than $5.00	25.9	12.9	11.7
$5.00-$9.99	51.8	45.2	46.7
$10.00 or more	22.2	41.9	41.7
Total	100.0%	100.0	100.0

N=176 Chi-square=8.55 p=0.07

Differences in shopping frequency among respondents in the four income groupings were statistically significant (Table 13). The biggest distinction is that respondents in the lowest income category tended to shop at the market least often; 32% of those with annual household incomes under $20,000 said they shopped only once a month or less compared to an average 9% of respondents in the other groups. Similarly, only 41% of the low income group said they shop weekly at the market while about 66% of the other respondents reported weekly visits.

Table 13. A Comparison of Shopping Frequency Based on Annual Household Income.

Frequency of Shopping	Income Levels: Less than $20,000	$20,000 to $39,999	$40,000 to $59,999	$60,000 or over
	------------percent---------			
Monthly or less often	31.8	8.5	7.41	10.3
About every two weeks	27.2	25.5	29.6	23.1
At least once a week	40.9	66.0	63.0	66.7
Total	100.0	100.0	100.0	100.0

N=157 Chi-square=14.62 p=0.02

Spending variations were also evident between respondents in the four income categories (Table 14). Nearly 32% of those with incomes less than $20,000 reported spending less than $5.00 per visit. Those who tended to spend the most had incomes of $40,000 to $59,999 and $60,000 or over; at least half of the individuals in these two income categories estimated they spend $10.00 or more each visit.

Table 14. A Comparison of Spending Patterns Based on Annual Household Income.

Average amount spent per visit	--------Income Levels--------: Less than $20,000	$20,000 to $39,999	$40,000 to $59,999	$60,000 or over
	--------percent-------			
Less than $5.00	31.8	6.4	3.9	7.7
$5.00-$9.99	61.4	55.3	46.2	33.3
$10.00 or more	6.8	38.3	50.0	59.0
Total	100.0	100.0	100.0	100.0

N=156 Chi-square=36.50 p=0.00

Summary and Conclusions

The survey results draw a picture of the Orono Farmers' Market patron that is remarkably consistent with those found in similar studies conducted in other regions of the U.S. The typical customer is an employed woman, age 35 or older, highly educated, who lives in a two-person household, has no children at home under age 18, and has a household income of $30,000 or higher. In comparison to the local population, she is more likely to be between the ages of 45 to 54 years old, employed, have an advanced college degree, and have a household income of $60,000 or more.

These primary customers live within the community, about 1-1/2 miles away from the market. Methods of discovery are primarily informal; most people learned of the market simply by driving by on the road and seeing it in operation, or they heard about it from friends or neighbors. Once they were introduced to the market, the most compelling reason for their continued patronage is the quality of the produce. Secondary motivations are the desire to support local farmers and the market atmosphere.

One distinction from other farmers' market studies is the relatively low importance of product prices. For the most part, these consumers perceive the products as having a high enough quality to warrant paying a premium. In comparison to conventional produce offered at the local supermarkets, respondents said they would be willing to spend an average of 17% more for produce at the farmers' market.

Another particularly interesting finding is the customer loyalty. These patrons usually visit the market at least once each week and spend an average of at least $10.00 per trip, significantly more than the intermittent shoppers. Most do not shop at any other farmers' markets in the area.

In general, the results point out that farmers at this market have successfully created a quality image of their products and that this is the single most important draw to consumers. Consequently, these high product standards must be diligently maintained. At the same time, vendors can feel confident about pricing their products to reflect the superiority of their products. Also, in the dual roles of farmer and marketer, vendors should emphasize the farmer component and the interpersonal relationship between buyers and sellers.

Survey information verifies the importance of informal methods of promoting the market and suggests that promotions should be concentrated within the community. This is the obvious and most accessible target group. The present customer base has been very effective in promoting the market to friends and neighbors via word of mouth and this is likely to continue to be an effective method of recruiting new customers. Vendors will need to expend additional efforts to attract lower income customers and inform them that food stamps and WIC coupons can be used. Also, road sign advertisements should be prominently displayed, since a high percentage first learned of the market in driving by.

Demographic patterns indicate that the number of older, highly educated, high income consumers is increasing. Since the data from this and other studies show that these consumers are likely to be most attracted to farmers' markets, the popularity of this shopping format is also likely to increase. To make the most of this trend, consumer studies should be conducted periodically to monitor consumer satisfaction, document changes in the customer base and provide information for marketing and promotion actions.

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