WHAT ARE THE BARRIERS PREVENTING CUSTOMERS FROM VISITING FARMERS' MARKETS MORE?

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THE CHALLENGE: The interest and appeal of purchasing food sourced from nearby farmers and growers has gained interest and appeal over the past several decades. Farmers market managers see significant decline in the number of customers and sales. A growing number of farmers are increasingly uncertain about the viability of farmers markets as a market channel to sustain their farm businesses in the future. Farmers market managers believe it is possible to bring customers back. They need to understand the barriers preventing persons from shopping at farmers markets and identify solutions to rebuild customer satisfaction and commitment.

RESEARCH OBJECTIVES: 1) Increase understanding of who is shopping at farmers markets; 2) Identify customer motivations to shop at farmers markets; and 3) Detect barriers and propose solutions to improve the customer experience at farmers markets.

RESEARCH METHODOLOGY:

- The primary project collaborators were located in the states of NY, MA, MD, and VT. An online, multi-state, Qualtrics survey was created and pre-tested by project collaborators. A Facebook page was developed as a portal for persons to access and complete the survey. The survey went live between 20 June 2018 and 01 October 2018. Each state collaborator was to promote the survey in such manner to secure 500 responses per state.
- The research focused on food sales at farmers markets by farm vendors.
- Survey respondents were classified in one of three consumer groups, identified as flagbearers, those persons who shopped the same or more frequently at farmers markets last year than the year prior; casual shoppers whom shopped less frequently at farmers markets last year than the year prior; or non-market shoppers, persons whom did not shop at farmers markets either year.
- Characteristic values and barriers may differ by consumer group. As a result these characteristics and barriers by consumer group were examined to determine statistical if they were different from one another. Average scores or frequencies of responses (i.e. the magnitude) ranked responses by consumer group. Both the ranks and the magnitudes were compared across consumer groups to determine if they are different from one another. Statistical and non-statistical differences can be informative.
- Means difference tests across samples were conducted to analyze statistical differences. This procedure involved computing differences between means and calculating a significance value using the *t*-test. The associated *p* value is the probability of obtaining the observed differences between the samples, if the null hypothesis were true. The null hypothesis was that the difference in means is zero, and $N_1 + N_2 - 2$ degrees of freedom. Statistical significance was defined as a *p* value less than 0.05.

RESEARCH BIAS:

- Approximately 75% of respondents were from the 4 project states (NY = 925, VT = 775, MD = 576, and MA = 580 Total = 2,856; Households participating from other states increased survey number to 3,847 total responses
- The survey was only available online and in English. This may bias downward the number of respondents where English was not their first language and for those whose online access was limited, often lower income households.
- The survey was lengthy and some respondents may not complete it due to survey fatigue.
- The survey was at the convenience of the respondent, it was not random.
- The survey can be difficult for persons to remember their farmers market shopping activities across a 2-year time span. General assessment is sufficient for our purposes.
- It is assumed that the sample number provides sufficient observations across consumer groups for statistical testing, necessary to address research objects.

CONSUMER GROUP CLASSIFICATION N = 3,847

Name	Percentage
Flag bearer	75%
Casual shopper	19%
Non-market shopper	6%

KEY DEMOGRAPHIC INFORMATION*

Characteristic	Percentage
Age	• 18 to 24, 2% • 25 to 34, 13% • 35 to 44, 17% • 45 to 59, 30% • >60 years old, 38%
Household structure	• Single, 23% • Married, or single w/partner, 71%
Household income	• <$25,000, 9% • $25,000 to $49,000, 19% • $50,000 to $99,000, 36% • >$100,000, 37%
Household size	• 1 person, 18% • 2 persons, 49% • 3 persons, 16% • 4 or more persons, 17%
Work status	• Unemployed or disabled, 3% • Part time, 15% • Full time or self-employed, 51% • Retired, 24% • Other, 8%
Race and ethnicity	• White, 91% • Hispanic or Latino, 1% • Black or African American, 1% • Native American, Hawaiian, <1% • Asian, 1% • Other, 6%
Gender	• Male, 15% • Female, 84% • Nonbinary, 1%
County of residence	• Metro, 72% • Non-metro, 28%

*Demographic distribution for flagbearers and similar for casual and non-market shoppers.

MOTIVATION TO SHOP AT FARMERS MARKETS

- Support local farmers and vendors
- Purchase fresh food
- Keep food dollars in local economy
- Other
- Participate in social or community setting

The primary reason for flagbearers shopping at farmers markets is to support local farmers and vendors (42%), followed by purchase of fresh food (38%). The primary reason for casual shoppers shopping at farmers markets is purchase of fresh food (42%) followed by support of local farmers and vendors (38%). Shoppers felt pride in support of vendors, happy when at markets and welcomed and appreciated. Less frequent shoppers felt pressure to purchase and intimidated to talk to farmers.

LARGEST BARRIERS TO ATTENDING FARMERS MARKETS MORE OFTEN

- Only open part of the year
- Market time conflicts with schedule
- Prefer convenience of 1-stop shopping
- Prices not competitive with other options
- Purchase local foods at other retail outlets
- Purchase local foods at other direct-to-consumer outlets already
- Hard for me to get to the farmers market

LARGEST BARRIERS TO SPENDING MORE AT FARMERS MARKETS

- Prices too high
- I don't carry cash with me
- Limited variety of local products
- Limited number of farmers to choose from
- Prices not posted by vendors

PRIMARY CONSIDERATIONS FOR MARKETING STRATEGIES TO IMPROVE FARM MARKET ATTENDANCE AND PURCHASES BY CUSTOMER CLASSIFICATION

FARMERS MARKET FLAGBEARERS	Highlight quality products, clean markets, and ease of travel to and from
	Prioritize support for local farms, than fresh food product
	Reinforce appreciation for attending
	Keep the food shopping experience fun and friendly
	Only local foods and own-farmer products, with reasonable variety in products and farmers
	Sufficient environmentally friendly products (organic, minimal packaging) increase purchases
	Minimally (but not zero) price conscious
	Variable operating hours will reduce time conflicts
	Increase SNAP/EBT availability and use of debit/credit cards
	Relationship with farm vendor moderately important
	Market season extension will increase purchases
	Recognize competition with other outlets (particularly direct-to-consumer outlets)
CASUAL FARMERS MARKET SHOPPERS	Highlight quality products, clean markets, and ease of travel to and from
	Prioritize fresh food products, then support for local farms
	Reinforce appreciation for attending
	Keep the food shopping experience fun and friendly, but organizationally efficient
	Only local foods and farmer-owned products, with variety in products and farmers important
	Clearly display all product prices – reduce need to talk to farmers to find out product use and pressure to purchase
	Moderately price cautious
	Variable operating hours will reduce time conflicts, including addition of evening hours
	Increase SNAP/EBT availability and use of debit/credit cards
	Adequate parking important
	Relationship wit farm vendor minimally important
	Address competition with other outlets (including retail grocery and other DTC outlets)
NON-MARKET SHOPPERS	Highlight quality products, clean markets, and ease of travel to and from
	Prioritize fresh food products, then support for local farms
	Introduce strong appreciation for attending (create incentives?)
	Double down on an efficiently organized shopping experience
	Only local foods or farmer-only grown foods not required. Need sufficient variety of products and vendors to choose from. Commonly purchased, non-local/off-season goods would improve attendance
	Clearly display all product prices – reduce need to talk to farmers to find out product attributes and pressure to purchase
	Very price conscious
	Variable operating hours will reduce time conflicts, particularly addition of evening hours
	Prioritize SNAP/EBT availability and use of debit/credit cards
	Adequate and convenient parking required
	Relationship with farm vendor not important
	Address competition with other outlets (including retail grocery and other DTC outlets)

Assessing the Barriers to Increasing Customer Participation and Farms Sales at Farmers' Markets: Implications for Marketing Strategy (Schmit, Severson, Sawaura. 2019. Extension Bulletin EB 2019-05. Cornell University, Ithaca, NY.) provides detailed information about barriers by customer group and outlines marketing strategies by demographic characteristics.

The project team developed a toolkit, *Reversing the Downward Trend: Toolkit for Adapting Farmers Markets to Match Consumer Trends,* which includes fact sheets on consumer trends, templates for creating new marketing materials, new and proven marketing strategies, market policies and practices that reflect consumer input on farmers markets, learning from the competition, opportunities for collaboration, market mapping and assessment tools for opening new markets and strategies that farmers can employ to increase customer interest. The toolkit will be available at the NESARE website in the near future.

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WE ARE APPRECIATIVE OF OUR PROJECT COLLABORATORS:

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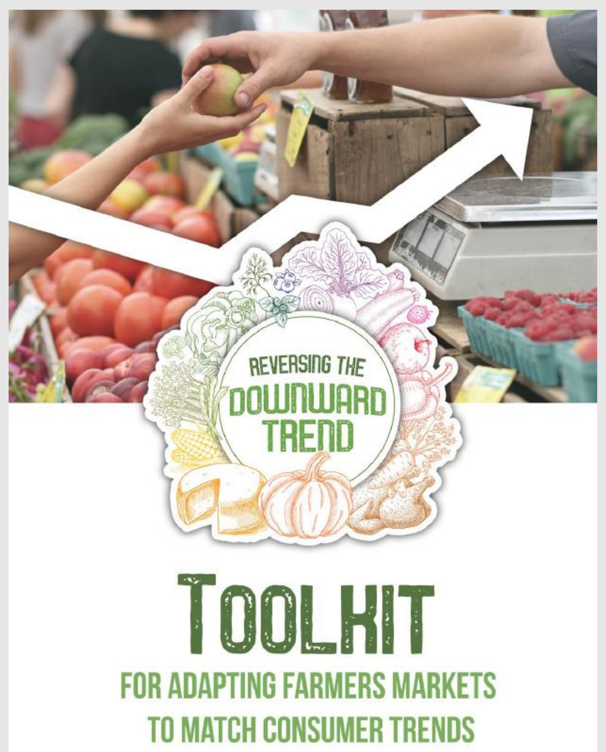
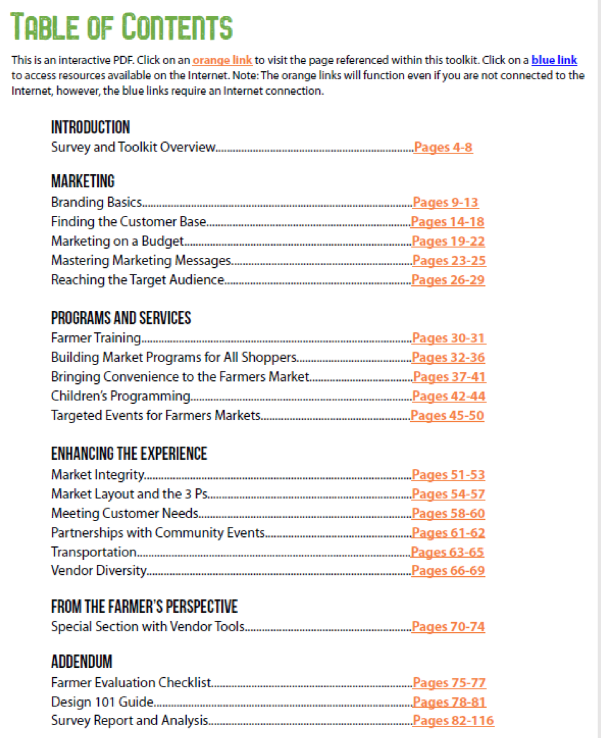
- **Northeast Organic Farming Association (Vermont)**
- **Maryland Farmers Market Association & University of Maryland Extension**





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