



Farmers Market Consumers in Rockingham and Strafford Counties, New Hampshire

by

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2013

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FARMERS MARKET CONSUMERS IN ROCKINGHAM AND STRAFFORD COUNTIES, NEW HAMPSHIRE



The University of New Hampshire (UNH) Department of Natural Resources and the Environment and UNH Cooperative Extension conducted a survey of customers of 24 farmers markets in Rockingham and Strafford Counties, New Hampshire, from July to September 2012. The purpose of the survey was to gather information about attitudes, motivations, preferences, and general characteristics of farmers market shoppers. The survey also contained questions about consumer purchases and shopping behavior in the summer and winter farmers markets in the two counties in 2011. Knowledge from this study could help farmers markets attract more customers and provide the products and shopping experience that the buyers need and want. This report presents selected information from the survey and focuses on summer markets.¹

Three hundred eighty-eight participants completed the questionnaire on a website hosted by the UNH Survey Center, which administered the data collection. The participants responded to requests to take part in the study; such requests were communicated to customers of farmers markets in the two counties through e-mail messages to people on the markets' e-mail lists and the markets' websites and social media (e.g., Facebook) pages. Posters and bookmarks containing information about the survey and an invitation to participate were also printed and made available at the farmers markets. Press releases about the study were also sent out.

DEMOGRAPHIC CHARACTERISTICS OF SURVEY RESPONDENTS

Several questions in the survey were designed to obtain demographic information about market customers. With knowledge about the characteristics of their customers, market managers and vendors could develop more effective advertising and outreach efforts, marketing strategies, and business plans.

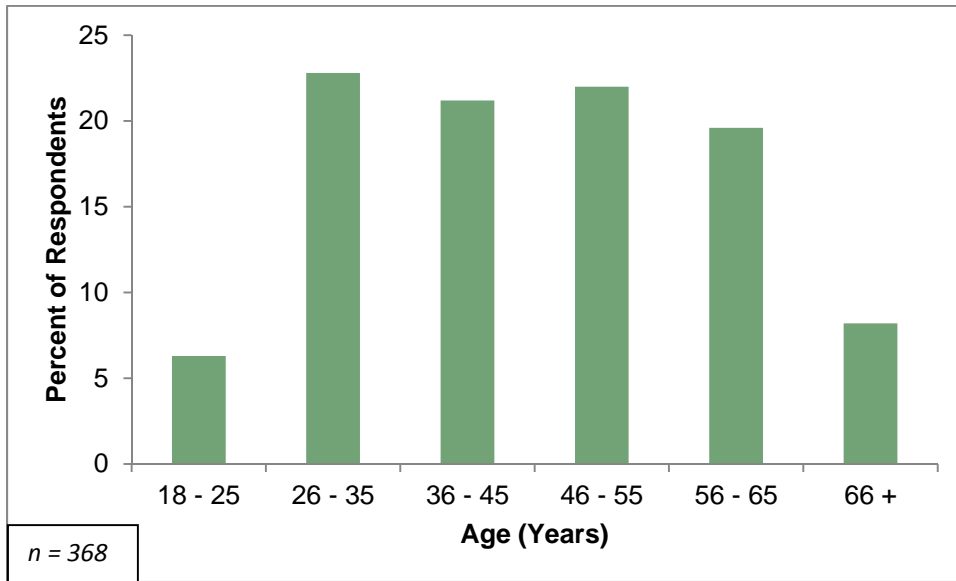
Age. Three hundred sixty-eight survey participants provided age information; the ages of the market customers ranged from 18 to 76 years and the average age of

¹ The complete results of the study are presented in McKenzie, Jewel E. *Farmers Markets in Rockingham and Strafford Counties New Hampshire: An Analysis of Market Manager and Consumer Trends, Preferences, and Characteristics*. Directed Research, University of New Hampshire, 2012.

the market customers was 45.7 years. Eight-five percent of the respondents were between 26 and 65 years in age. The age distribution was relatively even across the age categories of 26-35, 36-45, and 46-55, with a slight decrease in the 56-65 category (Figure 1).

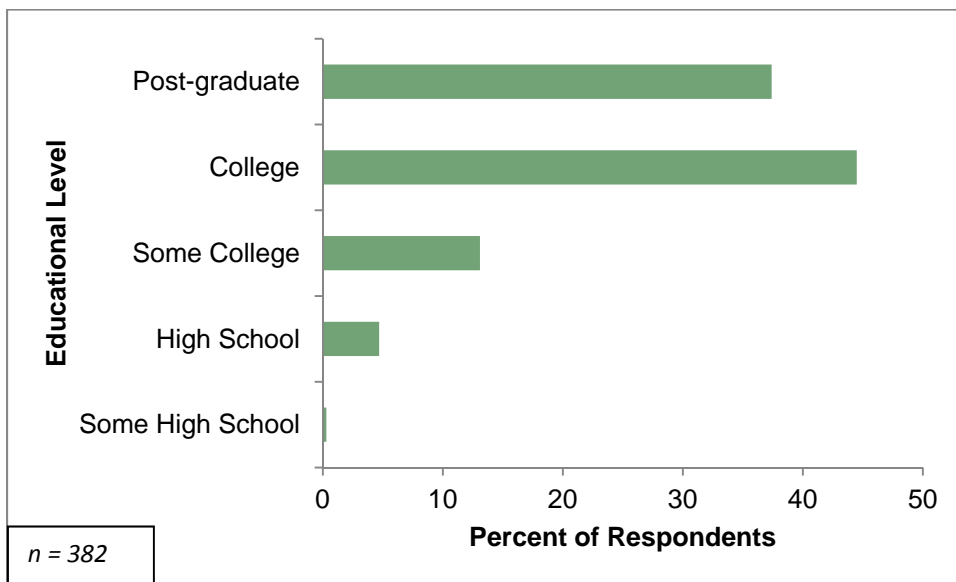


Figure 1. Age Distribution of the Survey Respondents



Education. Three hundred eighty-two respondents reported their highest educational level (Figure 2). About 82 percent had a college education or higher; 13.1 percent had some college education and five percent had a high school education or less.

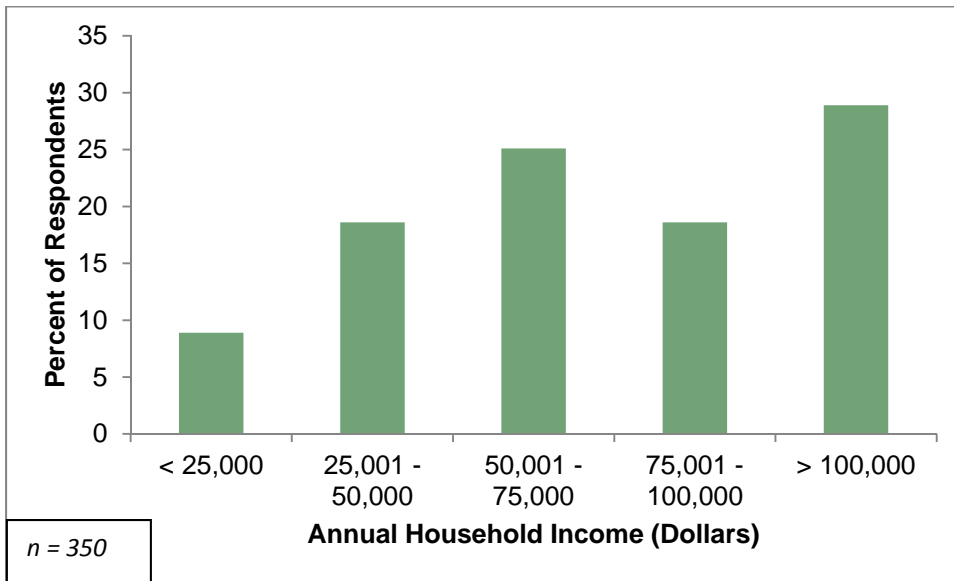
Figure 2. Educational-Level Distribution of the Survey Respondents



Income. The annual household income in 2011 was more than \$100,000 for 28.6 percent of 350 respondents (Figure 3). Approximately 25 percent were in households earning \$50,001 to \$75,000 a year; 18.6 percent earned \$25,001 to \$50,000, and another 18.6 percent had annual income between \$75,001 and \$100,000. Less than nine percent of respondents were in households with an annual income under \$25,000.



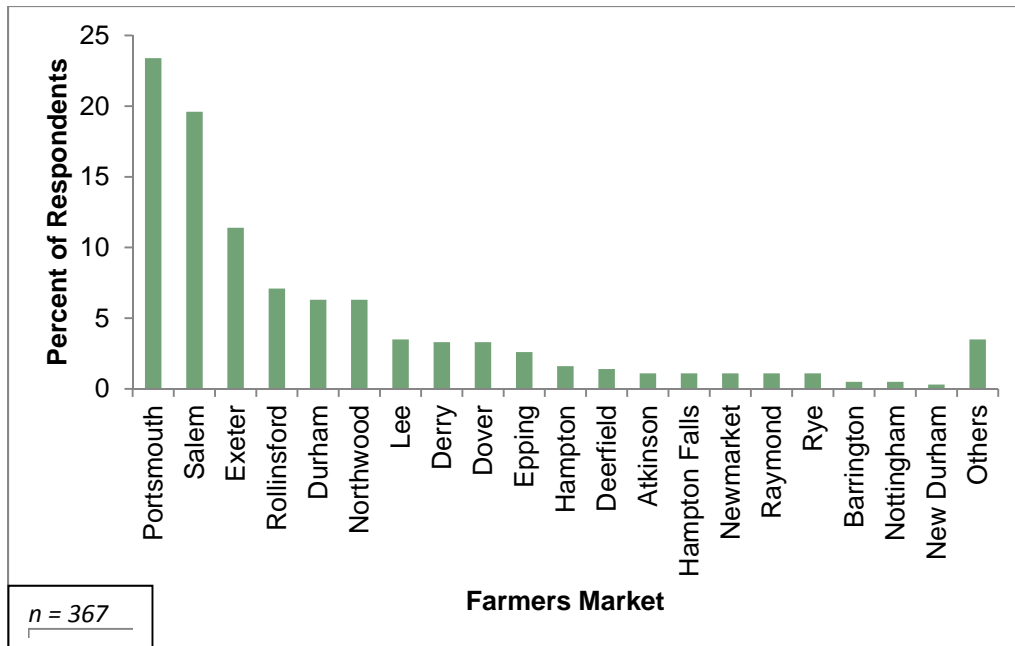
Figure 3. Income Distribution of the Survey Respondents



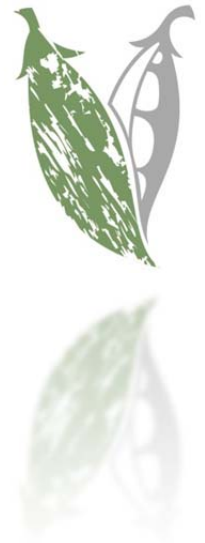
MOST VISITED MARKETS

As shown in Figure 4, the three most frequently visited farmers markets in the study area were Portsmouth (where about 23 percent of respondents shopped most often), Salem (about 20 percent), and Exeter (over 11 percent). The next three most-frequently visited markets were Rollinsford (7 percent), Durham (6.3 percent), and Northwood (6.3 percent). Each of the other markets was visited by fewer than four percent of the respondents.

Figure 4. Most Frequently-Visited Markets by Customers of Farmers Markets in Rockingham and Strafford Counties, New Hampshire



Three hundred thirty-two respondents also provided information on how long they had been going to their most-frequently visited market. The highest proportion of consumers—almost 30 percent—had been visiting their markets for three years, and 19 percent had shopped at their market for four years. Overall, more than 81 percent had been patronizing their market for five years or less.

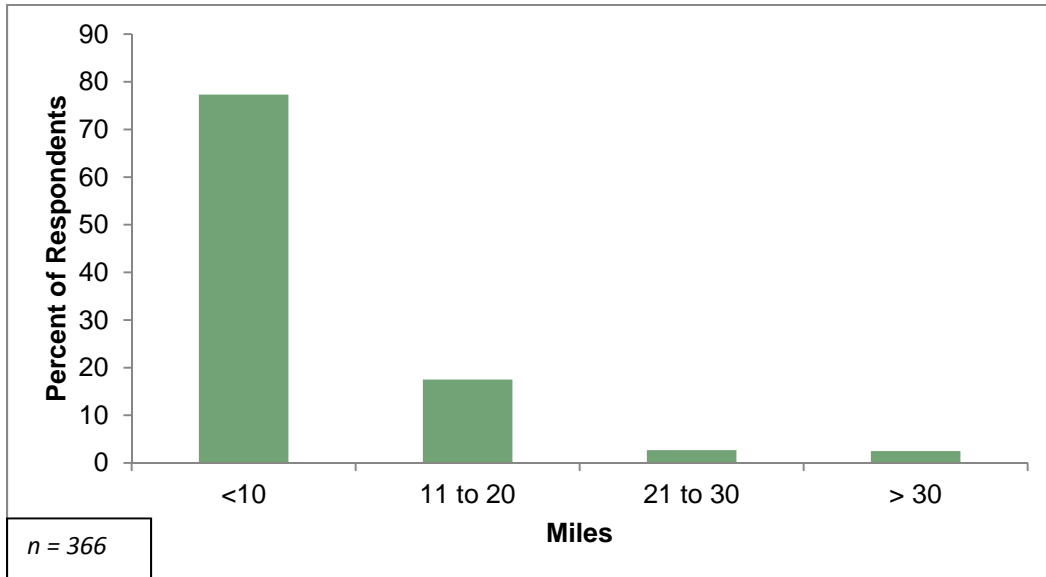


DISTANCE TRAVELED TO THE MARKETS



Of 366 respondents who provided information for this question, 77.3 percent traveled less than 10 miles to “their” farmers market (Figure 5). A smaller proportion of customers said they traveled more than 10 miles to their market—17.5 percent of respondents traveled 11 to 20 miles, and 5.2 percent traveled more than 21 miles.

Figure 5. Distances Traveled by Customers to Their Farmers Market

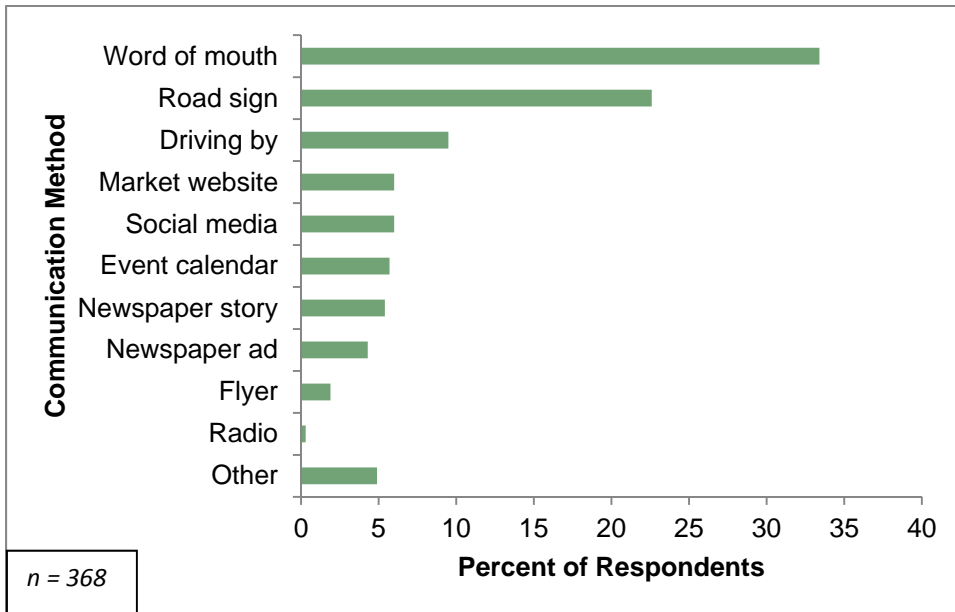


HOW CUSTOMERS OBTAINED INFORMATION ABOUT THEIR MARKETS

The survey asked customers how they first learned about their farmers market. As shown in Figure 6, the primary means of learning about the market was word-of-mouth (33.4 percent), followed by road signs (22.6 percent).



Figure 6. Ways By Which Customers First Learned About Their Farmers Market



Customers were asked to indicate all the methods that they used to stay informed about market activities and news. The greatest number of respondents indicated that they obtained the information through their market's website, followed by social media (Figure 7). Road signs and word-of-mouth were also sources of information for a significant number of respondents.

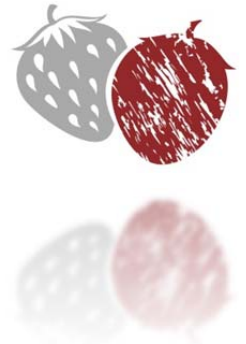
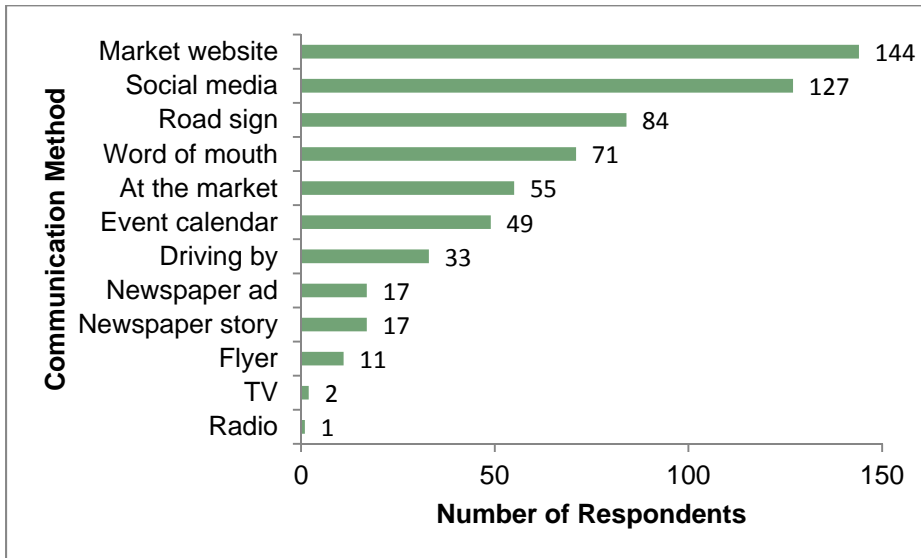


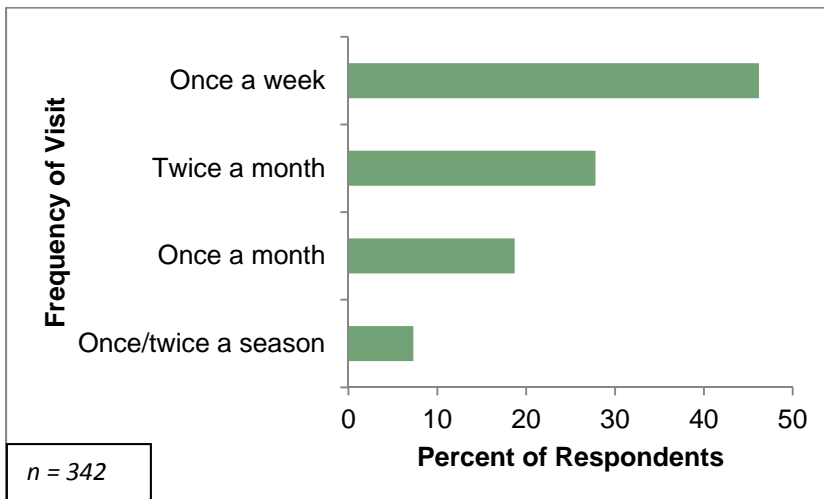
Figure 7. Ways By Which Customers Stayed Informed About Their Market's Hours and Activities



FREQUENCY OF VISITING THE MARKETS

Of 342 survey participants, 46.2 percent reported shopping at their market once per week, 27.8 percent shopped twice per month, 18.7 percent shopped once per month, and 7.3 percent shopped once or twice per season (Figure 8).

Figure 8. Frequency of Visits of Customers to Their Farmers Market in 2011

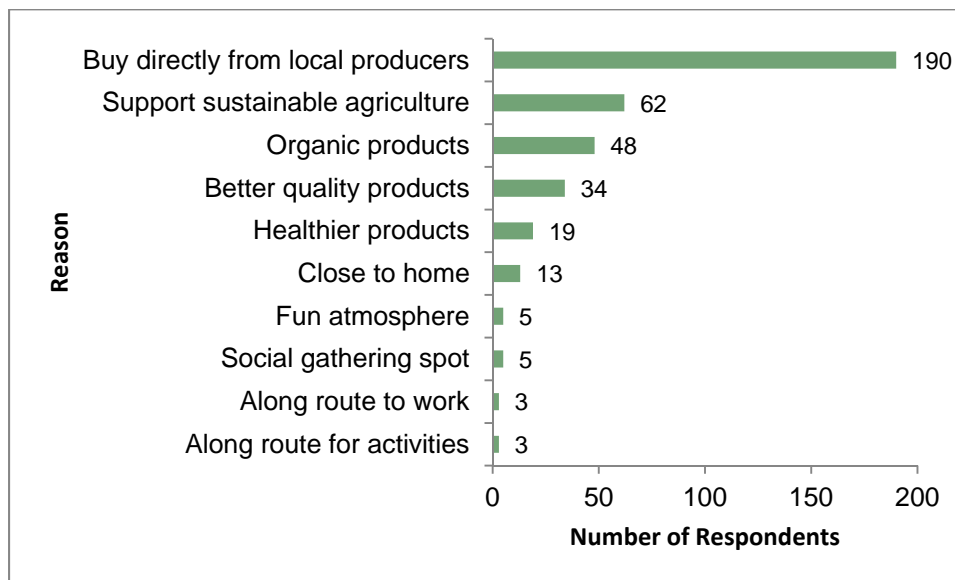


MOST IMPORTANT REASONS FOR VISITING THE MARKETS



The respondents were asked to identify the most important, second-most important, and third-most important reasons they visited their market in 2011. Figure 9 shows the reasons cited by the respondents as most important. The greatest number of respondents (190) indicated that the most important reason for visiting their farmers market was the opportunity to buy directly from local producers. Sixty-two respondents cited their desire to support sustainable agriculture, 48 survey participants cited the availability of organic products, and 34 respondents said they believed that the products in farmers markets have better quality was the most important reason. The same ordering emerged when the most important, second-most important and third-most important reasons cited by respondents were aggregated.

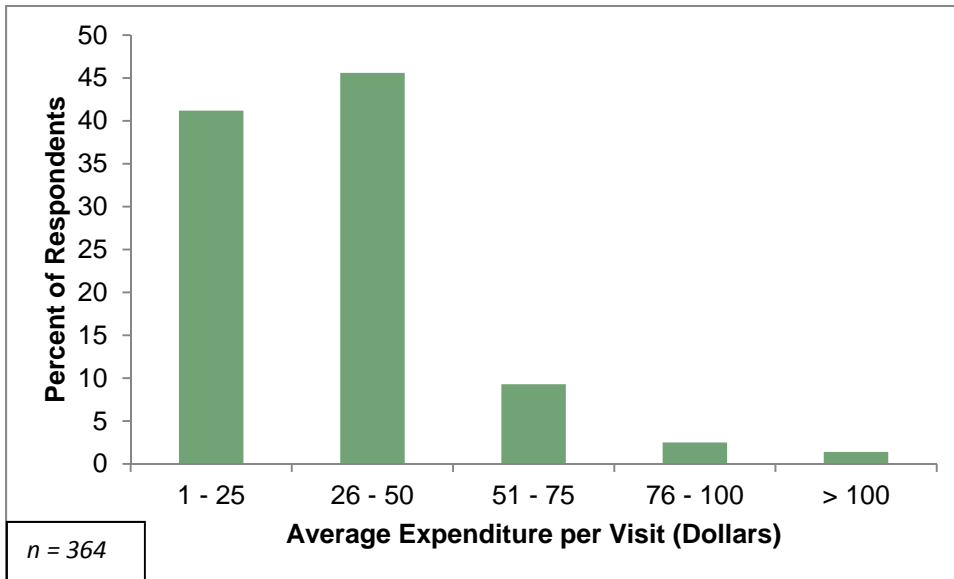
Figure 9. The Top Reasons Why Customers Visited Their Farmers Market



SPENDING AT THE MARKETS

The largest proportion of 364 respondents (45.6 percent) reported spending between \$26 and \$50 on average per market visit in 2011 (Figure 10). The average expenditure per visit for 41.2 percent of the respondents was in the \$1 – \$25 range, and it was more than \$50 for about 13 percent of the respondents.

Figure 10. Average Expenditures of Farmers-Market Customers per Visit



LEVEL OF SATISFACTION FOR MARKET CHARACTERISTICS



Participants were asked to rate their level of satisfaction for nine market characteristics: diversity of vendors selling produce, events and festivals, atmosphere, availability of parking, availability of restrooms, hours of operation, availability of places to sit, proximity to other points of interest in town, and the availability of public transportation to and from the market. They rated their level of satisfaction using the following scale: very satisfied, somewhat satisfied, neutral, somewhat dissatisfied, and very dissatisfied. The responses are shown in Table 1. Each characteristic was rated by at least 334 respondents.

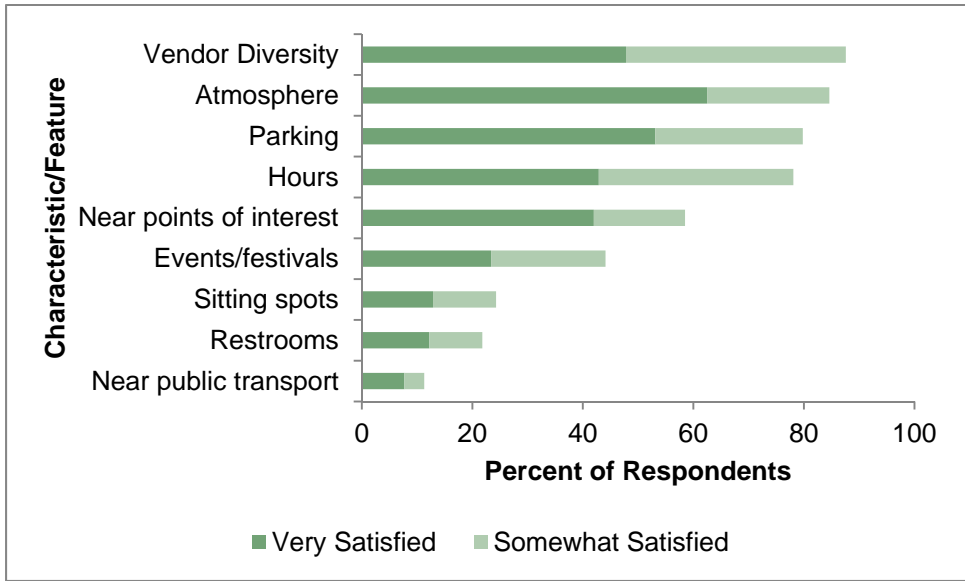
Table 1. Customers' Levels of Satisfaction with Regard to Market Characteristics

Characteristic	Level of Satisfaction					Number of Respondents
	Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Dissatisfied	Very Dissatisfied	
	Percent					
Vendor Diversity	47.8	39.8	5.8	6.1	0.6	365
Atmosphere	62.5	22.1	13.2	2.0	0.3	357
Parking	53.1	26.7	14.2	4.8	1.1	352
Hours	42.9	35.2	12.8	8.2	0.9	352
Near points of interest	42.0	16.5	38.6	2.3	0.6	345
Events/festivals	23.4	20.7	52.1	3.6	0.3	334
Sitting spots	12.9	11.4	54.6	16.9	4.3	350
Restrooms	12.2	9.6	57.8	15.7	4.7	344
Near public transportation	7.7	3.6	77.7	4.2	6.8	337

More than half of the respondents were very satisfied with the atmosphere (62.5 percent) and parking (53.1 percent) at their farmers market. As indicated in Table 1 and Figure 11, more than 80 percent of respondents were either very satisfied or somewhat satisfied with the vendor diversity and the atmosphere. Close to 80 percent were either very satisfied or somewhat satisfied with the availability of parking and hours of operation, and the proportion was 58.5 percent for the market's proximity to other points of interest.



Figure 11. Proportion of Respondents Who Were Either Very Satisfied or Somewhat Satisfied with the Characteristics of their Farmers Market



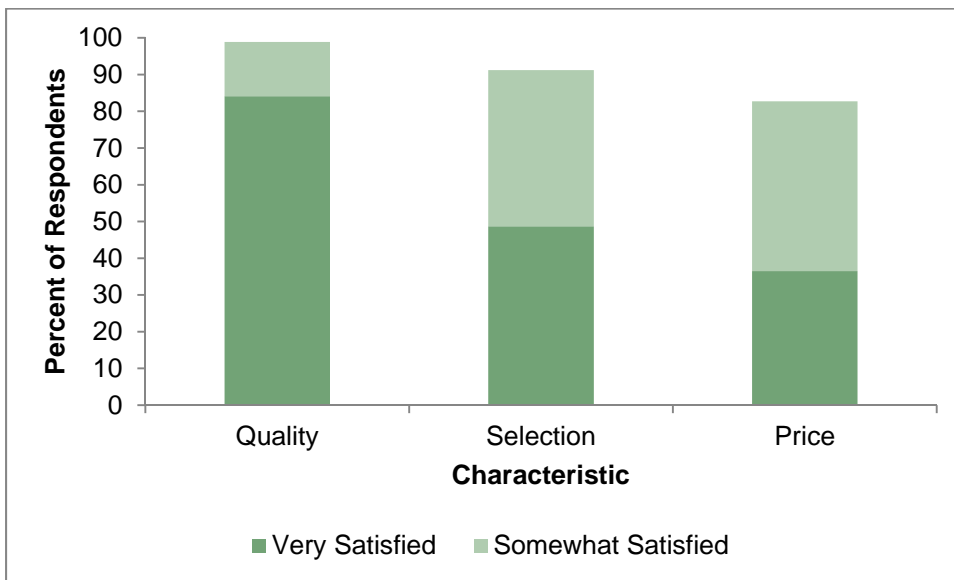
The availability of places to sit (21.2 percent) and the availability of restrooms (20.4 percent) were the characteristics for which the highest proportion of respondents indicated they were either very dissatisfied or somewhat dissatisfied. Nevertheless, more than 50 percent of the respondents were neutral about these characteristics, and the proportion of respondents who were either very or somewhat satisfied exceeded the percentage that were either very or somewhat dissatisfied. The same distribution of satisfaction ratings applied to events and festivals and the availability of public transportation.

LEVEL OF SATISFACTION FOR PRODUCT CHARACTERISTICS

Survey participants were asked to indicate their level of satisfaction with three product characteristics—price, quality, and selection. Their rating choices were very satisfied, somewhat satisfied, neutral, somewhat dissatisfied, or very dissatisfied. The number of responses varied according to the characteristic—364 for quality, 341 for selection, and 359 for price.

Figure 12 indicates that 84.1 percent of the respondents were very satisfied with the quality of the products in their farmers market. Less than half were very satisfied with product selection (48.7 percent) and price (36.5 percent). But when the very satisfied and somewhat satisfied ratings were combined, 98.9 percent, 91.2 percent, and 82.7 percent were satisfied with product quality, selection, and price, respectively.

Figure 12. Proportion of Respondents Who Were Either Very Satisfied or Somewhat Satisfied with the Characteristics of Products in Their Farmers Market



ADDITIONAL PRODUCTS DESIRED



One hundred thirty-six respondents provided information on other products they would like to see at their market. The most frequently mentioned products and the farmers market of the respondents are shown in Table 2. The most desired additional products, according to the number of respondents specifying these items, were vegetables, meat, cheeses and other processed dairy products, and fruits. Also mentioned were local beer, bread, flowers, baked goods, soaps, and wine, among others.

Table 2. Selected Products that Customers Would Like to See Sold at Farmers Markets in Rockingham and Strafford Counties, New Hampshire

<i>Product</i>	<i>Number of Respondents</i>	<i>Farmers Market that the Respondent Visited Most Frequently</i>
Vegetables	31	Barrington, Deerfield, Epping, Exeter, Hampton, New Durham, Northwood, Portsmouth, Rollinsford, Salem
Meat, including chicken & lamb	26	Atkinson, Dover, Lee, Northwood, Portsmouth, Rollinsford, Rye, Salem
Processed dairy products, especially cheese	22	Dover, Durham, Exeter, Lee, New Durham, Northwood, Portsmouth, Rollinsford, Rye, Salem
Fruits	22	Atkinson, Deerfield, Epping, Exeter, Hampton, New Durham, Portsmouth, Rollinsford, Salem
Fish/seafood	13	Dover, Durham, Exeter, Portsmouth, Rye, Salem
Prepared/specialty food	13	Dover, Durham, Exeter, Hampton, Lee, Portsmouth, Raymond, Rye, Salem
Handicrafts, including jewelry	12	Dover, Durham, Epping, Exeter, Portsmouth, Rollinsford, Salem
Milk, including raw milk	10	Durham, Exeter, Lee, Portsmouth, Rye, Salem
Organic produce	10	Exeter, Hampton, Northwood, Raymond, Rollinsford, Salem

PRICE PERCEPTION

Participants were asked whether the prices of certain farmers market products were higher, the same, or lower than the prices of those items in supermarkets. The product categories were fruit, vegetables, eggs, dairy, meat, and baked goods. The number of responses varied with the product (Table 3).

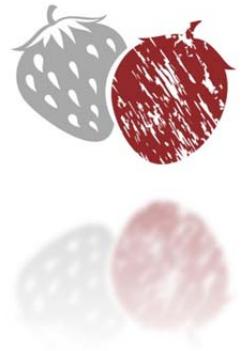


Table 3. Customers' Perception of Farmers Market Prices for Selected Food Products Relative to Supermarket Prices

<i>Food Product</i>	<i>Perception</i>			<i>Number of Respondents</i>
	<i>Higher</i>	<i>The Same</i>	<i>Lower</i>	
		<u>Percent</u>		
Fruits	64.2	29.1	6.7	344
Vegetables	57.8	31.9	10.3	351
Eggs	74.3	22.4	3.3	335
Dairy	76.9	21.4	1.7	299
Meat	85.9	12.5	1.6	320
Baked Goods	50.3	46.9	2.8	326

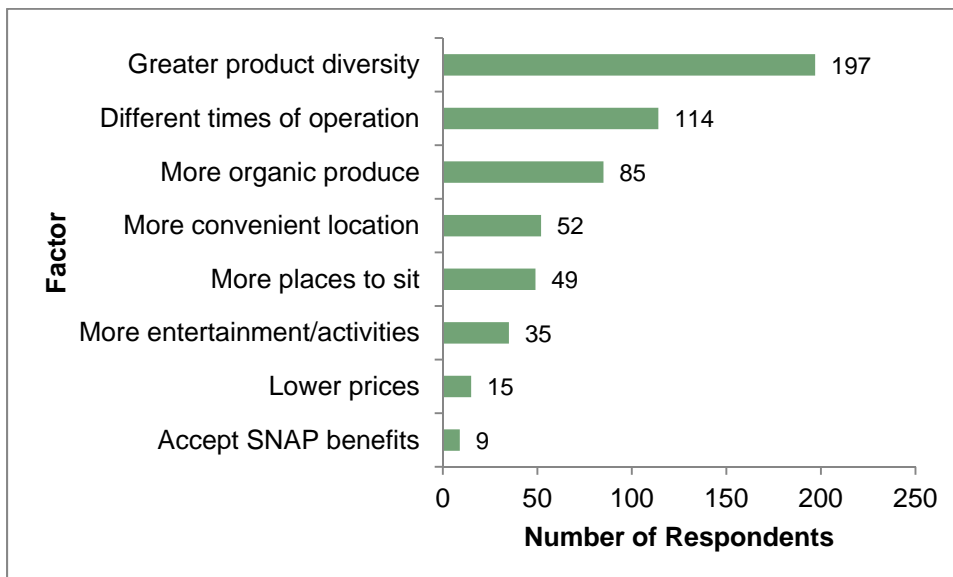
For all the specified product categories, more than half of the respondents believed that farmers market prices were higher than supermarket prices. About three-quarters or more of the respondents indicated that farmers market prices were higher than supermarket prices for meat, dairy, and eggs.

MOTIVATIONS TO INCREASE SHOPPING AT THE SUMMER MARKETS



The survey participants were presented with a series of choices about factors that would motivate them to shop at farmers markets more frequently, and they were asked to check all that apply. Additionally, respondents could specify other factors not listed on the survey. The most frequently chosen factor was greater product diversity, which was cited by 197 respondents (Figure 13). This was followed by different market times (114), more organic produce offerings (85), a more convenient market location (52), more places to sit (49), and more entertainment and activities (35). “Lower prices,” mentioned by 15 respondents, was the other factor most frequently cited by survey participants. Nine respondents indicated that acceptance of the Supplement Nutrition Assistance Program (SNAP) benefits would encourage them to shop more often.

Figure 13. Factors that would Motivate Customers to Shop at Their Farmers Market More Frequently



CONCLUSION

It appears that although the majority of respondents indicated that they were satisfied with vendor diversity in their farmers market, they would welcome a greater variety of products offered for sale, and they would likely shop there more often if a wider array of products were made available. Different kinds of vegetables, fruits, and cheeses and other dairy products, in addition to greater availability of meat products, are likely to draw more customers.

More than half of the respondents believed that prices for products typically sold in farmers markets were higher than supermarket prices for the same products; nevertheless, more than 80 percent of the respondents were either very satisfied or somewhat satisfied with those prices. Price is not a major factor in customers' decision to shop at farmers markets. Almost all of the respondents were either very satisfied or somewhat satisfied with the quality of products in farmers markets. Customers seem to find the prices acceptable given the high quality of the products that they are able to buy.

The desire to support local producers appears to be the dominant reason why the respondents patronized their farmers market. It seems that farmers market shoppers are willing to spend a few dollars more provided that their expenditures go to local farmers and other producers; in doing so, the customers indicate that they value the activities and contributions of those producers. This suggests that local producers should consider the farmers market shoppers as more than customers; they should be considered as partners in the producers' enterprise. It would be of long-term benefit to the producers if the partnership with the consumers is nurtured and strengthened. Communications to farmers market shoppers about the producers' operations, products, and activities, and soliciting ideas and feedback from consumers would help establish the relationship and allow it to flourish.

Farmers markets should avail themselves of the Internet in communicating with their customers. The markets, if they have not done so, should create a website and have a presence on social media sites; a significant number of the survey participants indicated that they relied on these methods to stay informed about their market's hours and activities. These sites will also help information about the market spread through word-of-mouth, the primary means by which respondents first learned about their market. Farmers markets should also invest in signage; it remains an important component in bringing the market to the attention of potential shoppers.

This survey has generated information that could help farmers markets in Rockingham and Strafford counties enhance their efforts to expand the number of shoppers and provide the products, services, and amenities that their customers prefer and value. However, consumer characteristics and preferences shift over time, along with changes in the social and economic environments; therefore, it is important for the farmers markets to conduct their own consumer studies periodically. Such studies will be helpful in maintaining the economic viability of farmers markets and sustaining local agriculture.

The population in the survey area is better educated and has higher incomes than many other areas of New Hampshire.

RELATED RESEARCH

The UNH Department of Natural Resources & the Environment and UNH Cooperative Extension also conducted a survey of managers of the farmers markets in Rockingham and Strafford Counties in 2012. Selected results of that study are presented in the publication entitled *Farmers Markets in Rockingham and Strafford Counties, New Hampshire*.



ACKNOWLEDGEMENTS



FARMERS MARKETS

Atkinson Farmers Market
Barrington Farmers Market
Deerfield Farmers Market
Derry Community Farmers Market
Dover Farmers Market
Durham Farmers Market
Epping Farmers Market
Exeter Farmers Market
Farmington Farmers Market
Hampton Farmers Market
Hampton Falls Farmers Market
Lee Farmers Market
New Durham Farmers Market
Newmarket Farmers Market
Northwood Farmers Market
Nottingham Farmers Market
Plaistow Farmers Market
Portsmouth Farmers Market
Raymond Farmers Market
Rochester Downtown Farmers Market
Rochester Four Corners Farmers Market
Rye Farmers Market
Salem NH Farmers Market
Wentworth Greenhouses Farmers Market

AGENCIES AND ASSOCIATIONS

NH Department of Agriculture, Markets & Food
NH Farmers Market Association
Seacoast Eat Local
Seacoast Growers Association

THE RESEARCH STUDY WAS SUPPORTED BY:

College of Life Sciences and Agriculture, University of New Hampshire
University of New Hampshire Cooperative Extension, Rockingham County