Indiana County Farmers' Market –

Market Research Data Analysis and Discussion

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Executive Summary

Between March and June 2019, I conducted research to explore the opportunities for the Indiana County Farmers' Market to expand its reach into new markets. Specific questions included what new markets might exist? What needs might these customers have? What barriers, if any, exist for them? I also sought feedback from existing customers. The research methods included an electronic survey and several interviews.

The survey was distributed electronically to the email lists of four groups: the Farmers' Market newsletter recipients; members of the Food Co-op of Indiana; the Indiana County Chamber of Commerce; and faculty, staff, and administrators of IUP. The survey covered questions included general awareness of the Market and barriers might limit participation at the market (the full list of survey questions is in the appendix.) The survey yielded 441 completed responses, resulting in a response rate of approximately 25%.

Key findings from the survey focused on the topics of: timing and location of the Market, the number of vendors, variety of offerings, and overall advertising. Regarding timing of the Market, 48.5% of respondents (201) indicated "yes" or "maybe" that a different time would alter their participation; respondents most frequently selected an 8 a.m. start and 1 p.m closing. Regarding location, 36% of respondents indicated that a different change would alter their participation; respondents most frequently selected moving the Wednesday Market downtown, and moving the Saturday Market to IRMC park. Further, respondents would like to see more vendors (75.8%), more variety of offerings (57.9%) and ready-to-eat foods (56.9%). As for advertising, only 20% thought the Market was well advertised. Over 50% felt the Market was not well advertised. It is important to note that most respondents are aware of the Market and still do not feel it is well advertised.

In addition to the survey, three interviews were conducted with individuals from local community programs: Vickie Burgess, center services administrative supervisor for Aging Services, Inc.; Amy Kemp, food program director for the Indiana County Community Action Program (ICCAP); and Robert Gaylor, vice chair of the Zion Lutheran Church Council and responsible for the Zion Church Food Pantry. The findings from the interviews support the findings from the survey, and highlight additional opportunities for the Market.

All three identified the aging population of Indiana as a group that would benefit from the fresh produce provided at the Farmers' Market. However, people who are aging often lack transportation; better advertising would help them coordinate transportation on Market Days. The interviewees also noted the limited income many experience, and were unsure if the Market accepts SNAP. Better communication of this may encourage more customers. The interviewees also expressed the same interests as changes to the timing of the Market, and expanded produce and vendor options. However, they added that many deal with physical mobility issues, which may inhibit them from participation. Additionally, the three interviews highlighted that increasing partnerships with community organizations and engaging volunteers may increase the customer base as well.

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Interest in the promotion of healthy, local food has grown, and so has the need of local producers to improve Market access and services. Recent initiatives over the last ten years include the Indiana County Farmers' Market (ICFM) now accepting SNAP benefits, development of a community garden, and the annual Seedling Project.

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Survey Results

Shopping Patterns The survey asked questions to explore people's awareness of the Market. Of the 441 respondents who completed the survey: 279 stated they are aware of and shop at the Market; 41 are aware of the Market but do not know where it is located; 47 are aware but do not know when it was open. (See Figure 1.) However, these individuals also indicated they are interested in shopping at the market.[1] Only 25 did not know about the Market. In addition, 36 respondents indicated having barriers to attending the Market, and only13 stated they were not interested in shopping at the market.

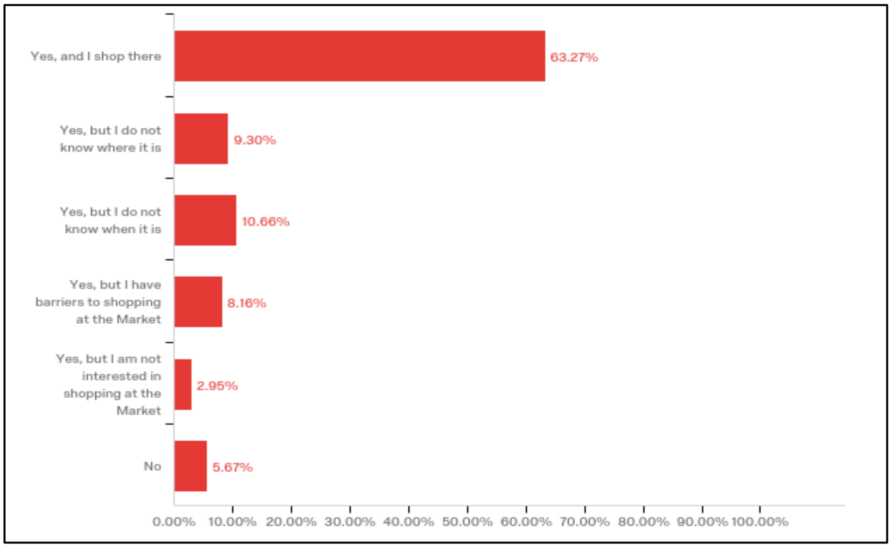


Figure 1 Awareness of Farmer's Market

Of the 36 individuals who listed having barriers to attending the Market, 30 indicated having a standing commitment during the times the Market is open (8 of these indicated timing as a problem under "other".) About 20% indicated that not knowing if debit cards were accepted at the Market. Three (3) respondents indicated transportation being an issue, and four (4) indicated financial barriers, with two (2) saying the prices are high. (See Table 1.)

Barriers	Total	Percentage
Transportation to and from the market	3	6.4%
Financial	2	4.3%
Does not know if the market accepts debit cards	7	14.9%
I have a standing commitment during the times the Market is open	22	46.8%
The prices are too expensive	2	4.3%
Other:	11	23.4%
Total	47	

Table 1 Barriers to Shopping

[1] Individuals who indicated that they did not know when or where the Market was held were directed to a website providing that information.

In looking at frequency of shopping, 323 respondents responded to shopping at both the Saturday and Wednesday Markets. However, Saturday shoppers tend to shop more frequently than Wednesday shoppers.

As Figure 2 shows, Saturday shoppers are more evenly distributed

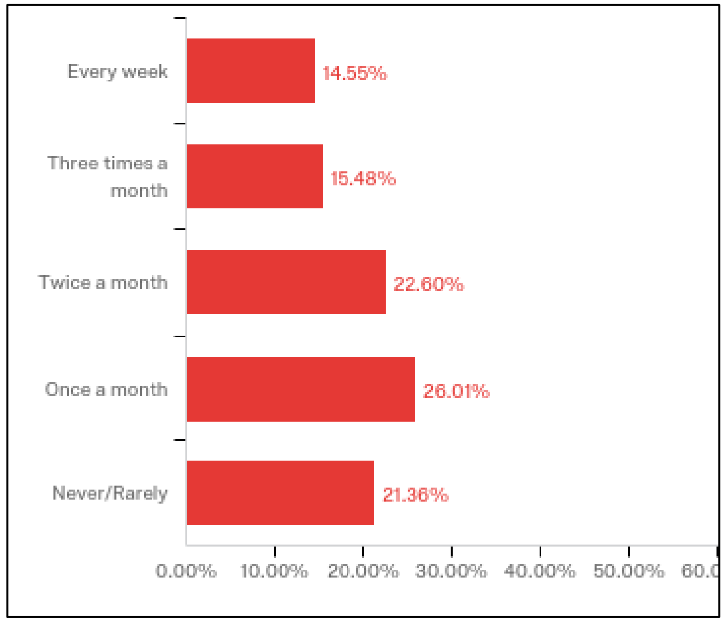
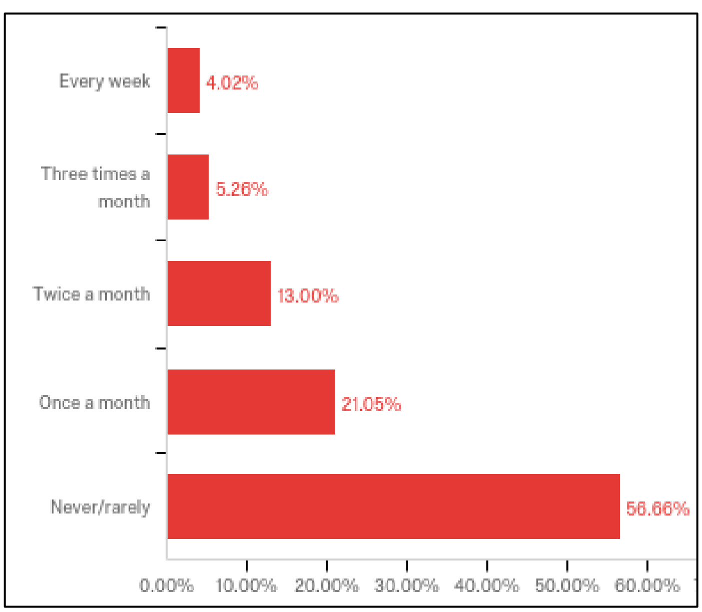


Figure 2 Saturday Shopping Frequency

in terms of frequency; in other words, more shoppers shop more often on Saturdays. Specifically, 97 individuals indicated that they shop at the Saturday Market three to four times a month, 73 indicated they shop twice a month, and 84 said they shop at this Market just once a month. Of these 323 individuals, 57 stated they rarely, and 12 said they never, shopped on a Saturday.

Figure 3 Wednesday Shopping Frequency



Compared with Saturdays, the breakdown of Wednesday's shopping patterns (Figure 3) is skewed towards more infrequent visits. Only 30 individuals indicated that the shop at the Wednesday market 3 to 4 times a month, 42 twice a month, 68 once a month, 172 rarely, and 12 never.

Regarding the best hours of operation for shopping, the morning hours between 10 a.m. and 11 a.m. are most popular for Saturday. Further, individuals with barriers that do shop at the Saturday Market are most likely to do so from 11:00 a.m. – 12:00 p.m. In written responses, several respondents that indicated a Saturday 8:00 a.m. opening and a 2:00 p.m. closing would increase their level of shopping at the Saturday Market. These individuals often commented that they would like to attend the Market before work, or that they have morning commitments; they state that the Market is often closed when they are able to shop.

Regarding the Wednesday Market, the hours between 4 – 6 p.m. are most popular window for shopping. Interestingly, the 6 – 7 p.m. window was the most likely time people with barriers indicated they would shop. However, this timeframe is not currently an option. This suggests that the numbers of Wednesday shoppers might increase if the hours were increased to include 6-7 p.m. There were a few respondents that indicated that they would attend more frequently if the Wednesday Market also covered the lunch window.

Table 2. Hours of Shopping Frequency

Saturday Market

Hours of operation	Percentage	Count
9:00 a.m. 10:00 a.m.	21.93%	152
10:00 a.m. 11:00 a.m.	27.71%	192
11:00 a.m. a.m. 12:00 p.m.	21.07%	146
12:00 p.m. 1:00 p.m.	10.97%	76
1:00 p.m. 2:00 p.m.	8.95%	62
n/a	9.38%	65
Total	100%	693

Wednesday Market

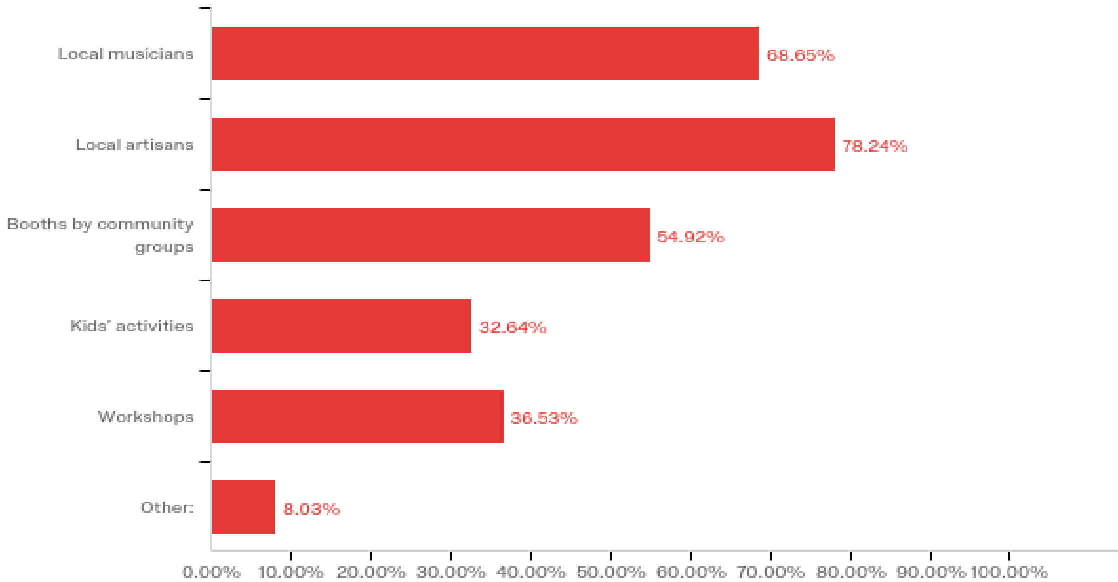
Hours of operation	Percentage	Count
2:00 p.m. - 3:00 p.m.	6.81%	39
3:00 p.m. - 4:00 p.m.	11.52%	66
4:00 p.m. - 5:00 p.m.	25.83%	148
5:00 p.m. - 6:00 p.m.	21.64%	124
6:00 p.m. - 7:00 p.m.	13.61%	78
n/a	20.59%	118
Total	100%	573

As a follow-up, respondents were asked if a different time would change their level of participation. A total of 218 individuals (about half) indicated that a change in time will not alter their level of participation. However, 206 (48.5%) said a different time might or would change their level of participation.

Next, the survey asked about the location of the Saturday and Wednesday Markets. 80% or respondents indicated that they like the location of the Saturday Market and 67% like the location of the Wednesday Market. When asked if a change in location would alter participation at the Market 64% indicated a change would not alter their level of participation. However, 147 individuals, or 36%, stated that a different location would change participation. Respondents were asked for their preferred alternatives, and 117 offered suggestions. Of these, 33, or about 28%, indicated they would prefer something having walkable and accessible to downtown; 14 other respondents specified IRMC Park or N.7th street. Nine (9) indicated using the S&T lot for the Wednesday Market, nine (9) suggested lookout outside of downtown. Other locations included BiLo, Big Lots, KCAC and the lot across from the KCAC, IUP Campus, the Indiana Mall, Mack Park, Giant Eagle, Indiana High School, Levity, S&T Arena/White Township Rec. Center, and anywhere with better parking.

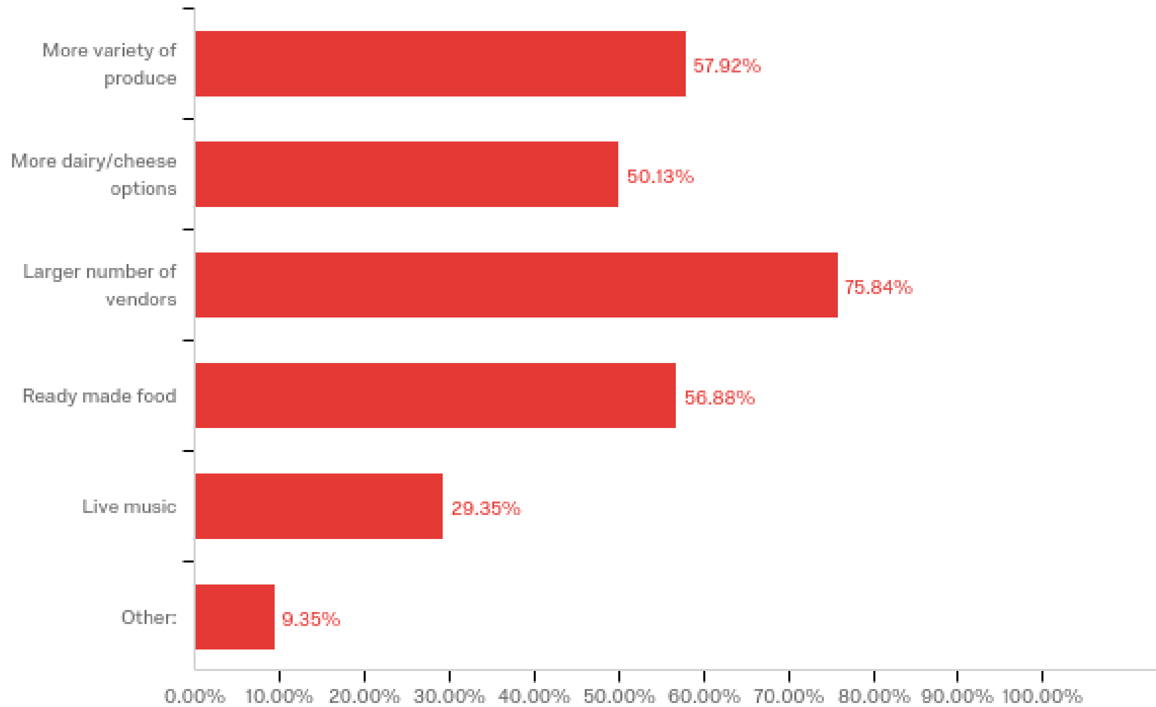
Market Offerings After location, the survey asked about specific activities that respondents might want to see at the market. Activities includes local musicians, artists, booths for community groups, kids' activities, workshops, and an opportunity for suggestions. The most popular activity or item was having local artist (302), followed by local music (265), and community groups booths (212). Other suggestions included having food demos, food trucks, prepared food/ready-to-eat items, coffee shop setup, yoga/medication, and more vendors among other items.

Chart 5: Activities at the Market



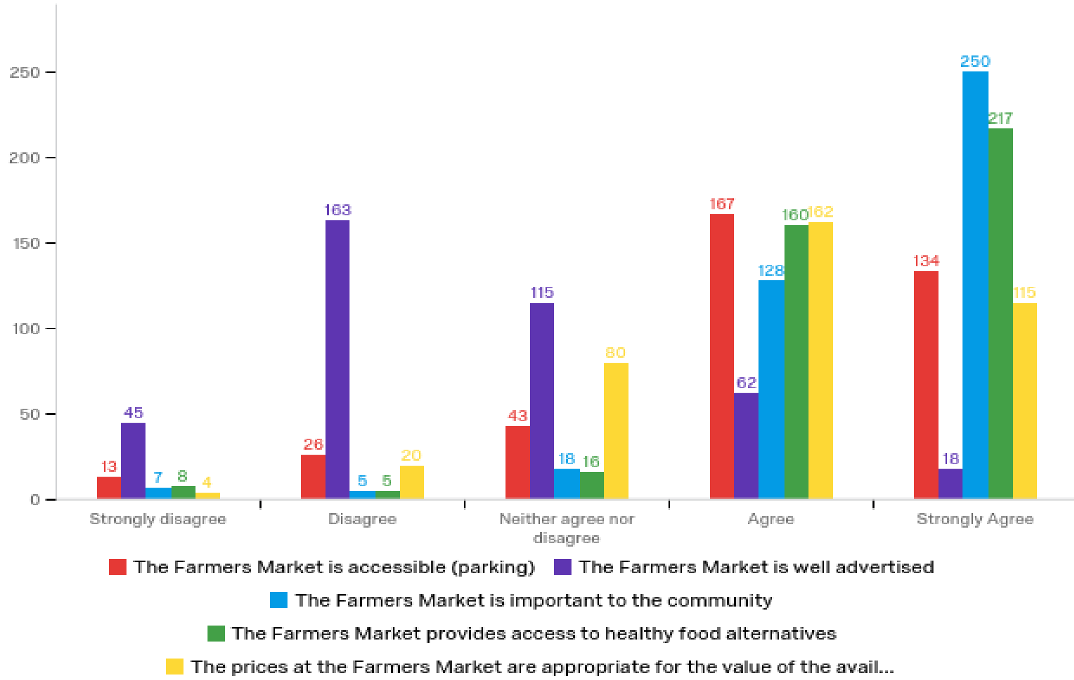
The activities question was followed up by a question asking about Market offerings and whether they would change the level of an individual's participation at the Market. This covered more variety of produce, more dairy/cheese options, more vendors, ready-made food, live music, and other. More venders (292), more variety of produce (223), and ready-made food (219) were the most selected.

Chart 6: Market Offerings



The survey then asked what would make a person shop at the Market more. There were over 275 responses. There were many different suggestions, but there were a few themes that emerged. Individuals are looking for more vendors, greater variety and availability of produce, and better advertising/marketing. There were some items that the Market has no control over like an individual's proximity to Indiana to shop at the Market, however, better marketing may prompt individuals to shop at the Wednesday market before they leave town. A few people mentioned reminders being e-mailed and posted on social media or increase signage around town. The marketing shows up as a concern when looking at satisfaction data. Over 50% indicated that the disagreed or strongly disagreed that the Market is well advertised.

Chart 7: Farmers' Market Satisfaction



Farmers' Market Satisfaction with:							
#	Question	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
1	The Farmers' Market is accessible (parking)	3.40%	6.80%	11.20%	43.60%	35.00%	383
2	The Farmers' Market is well advertised	11.20%	40.40%	28.50%	15.40%	4.50%	403
3	The Farmers' Market is important to the community	1.70%	1.20%	4.40%	31.40%	61.30%	408
4	The Farmers' Market provides access to healthy food alternatives	2.00%	1.20%	3.90%	39.40%	53.40%	406
5	The prices at the Farmers' Market are appropriate for the value of the available food	1.00%	5.20%	21.00%	42.50%	30.20%	381

The survey also included some basic demographic questions such as birth year, gender identification and race. The average reported age of the survey participants was 49.5 years old, with the most common age range of 55 – 64 (23%). See table 1 for additional breakdowns in age of respondents. Just over 91% reported ad identifying White/Caucasian (see table 2) and 77% identified as female (see table 3). In comparison, according to the 2017 Census Bureau estimates, the Indiana Borough's average age is 21.7 years old, 86.9% identify as white, and 50.1% identify as female. The difference in age may be attributed to the number of traditionally aged college students that live in the borough. The breakdown in race composition is in line with Census data for Indiana Borough. The higher rate of female participants in the survey, while not representative of Indiana Borough demographics, is in line with research showing that females make up 70-80% of all consumer purchasing, especially as it relates to purchasing food (Brennan, 2015)

Table 1: Age of Respondents

Age Range	Totals	Percentage
19-25	3	1%
26-34	60	13%
35-44	83	18%
45-54	72	16%
55-64	102	23%
65+	48	11%
Unreported	82	18%
Total	450	

Table 2: Race

Race/Ethnicity	Total	Percentage
American Indian or Alaskan Native	2	0.5%
Asian	2	0.5%
Black or African American	4	1.0%
Native Hawaiian or other Pacific Islander	0	0.0%

White/Caucasian	373	91.4%
Identify differently	5	1.2%
Do not wish to answer	22	5.4%
Total	408	

Table 3: Gender

Gender Identification	Total	Percentage
Male	85	20.8%
Female	316	77.3%
Identify differently	0	0.0%
Do not wish to answer	8	2.0%
Total	409	

In addition to the survey I meet with three individuals from local community programs: Vickie Burgess, center services administrative supervisor for Aging Services, Inc.; Amy Kemp, food program director for the Indiana County Community Action Program (ICCAP); and Robert Gaylor, vice chair of the Zion Lutheran Church Council and responsible for the Zion Church Food Pantry. Like the survey, the interviews sought to determine what new markets, if any, might be tapped into. I asked about possible ways to connect to potential new markets. If there were new markets, were there any unique needs to be aware of? And, I asked if there were barriers, what might they be. There were a few themes that emerged from these interviews. The themes included potential barriers to shopping at the market, program support needed for their operations, and a desire for local and fresh food. The populations served by these agencies are majority elderly. However, the ICCAP Food Bank does a program that targets children, and the Food Pantry has several young adults that use these services. Additionally, all three programs have some level of interaction with local, state, and/or federal government that helps to support their initiatives.

When asked what they believed to be the most common barrier to shopping at the Market, all three discussed transportation. Some individuals are not physically able to drive, do not have access to their own vehicles, cannot afford transportation, or are not aware of transportation options. Additional barriers discussed included not having enough money, not sure if the Market accepts SNAP, timing of the Market, produce and vendor options, and physical mobility issues.

All three indicated a need for volunteer support and partnerships to succeed. Each of the entities utilize multiple partners from the University to the Federal Government to gain access to funding, volunteers, and other resources. While volunteers are particularly important for ICCAP and the Food Bank, all three indicated limited resources make a difficult job that much tougher. Each find creative ways to ensure they meet the needs of those they support to the best of their ability. They are keenly aware of affordability as it relates to balancing their own budgets and the depth of those who use their services.

As it related directly to the Market, the two most common themes were related to advertising and the importance of building community partnerships. All three shared that they are open to creating a better connection with the Farmers' Market. Mr. Gaylor discussed that the Market provides access to fresh foods that would serve many of their families. He shared that he would be open to sharing more information about the Market at the Food Bank. Ms. Kemp of the ICCAP Food Bank indicated that there was little if any connection with the Market at all. She would be open to working with the Market and the farmers to see if there are opportunities for collaboration. Mrs. Burgess of Aging Services commented that it would be great if there were trained volunteers that could help distribute vouchers at the Market.

Discussion

The purpose of this research study was to try to identify new markets. If new markets were identified, the study tried to detect barriers that may currently be preventing groups from shopping at the Market. The study also provided a snapshot of who is shopping at the Market from the population sampled. By understanding who is shopping at the Market it can help develop insights into other areas to conduct outreach such as the local school district. In looking at the demographics of the respondents to the survey, there appears to be a skew towards white/Caucasian women who are between 55-65 that shop at the Market. However, the average age of individuals living in Indiana Borough is about 21 years old. There may be an opportunity to explore great reach to individuals ages 18-25. Additionally, the racial composition of respondents was representative of the Indiana Borough population, there appears to be room to connect with Black, Asian, and Latino populations in and around Indiana.

Overall, there is strong support from the respondents and the interviewees regarding the place of the Indiana County Farmers' Market in the community. They want the Market to grow and thrive. They indicate a desire for buying local and buying fresh and people are willing to drive to get fresh food and have an experience. Respondents did indicate that marketing and general advertising of the Market made it difficult to plan accordingly to attend. This could lead to residents of Indiana Borough to look at other markets for their local produce. Several respondents listed the Ligonier market, they have been visiting recently. While its scale does not make it a good comparison for ICFM, it would be worth exploring the growth and development of this market to see if there are similar opportunities for the Indiana County Farmers' Market.

Other items to consider:

- Are there ways to improve access to individuals who are seeking to use SNAP benefits? What type of educational material are provided to help those individuals shop? Are there ways to add incentives for individuals to shop at the Market?
- Is there an opportunity to work with farmers to get certified by the Pennsylvania Department of Agriculture to be able to participate in the voucher program supported by Aging Services? If current vendors are certified, how does an individual with a voucher know? Are there other local, state, or federal programs through which the Market might access those in need?
- Is there an opportunity to work with the local school district and childcare programs to provide local fresh food and or education on buying fresh/buying local?
- Are partnerships in and around the community that should be explored? Taking stock of the local businesses, service providers, other non-profits, may yield additional insights for new markets and improved outreach. This might include local school districts, the Indiana County Chamber of Commerce, Downtown Indiana, VFWs, retirement centers, the United Way, etc.

In conclusion, there are many opportunities for the Indiana County Farmers' Market to engage untapped population:

- Expand advertising the market ahead of and the day of the Market to increase exposure and awareness.
- Explore the opportunities to connect with the 18–25-year-old population in the Borough. This would include finding ways to connect with Indiana University of Pennsylvania students when in classes are in session and young adults who are back in Indiana when classes are not in session.
- Evaluate feasibility of expanding the hours of the Saturday market.

- Identify strategic partnerships in the borough and the county that can help expand the reach of the Market. This may include, but not limited to local school districts, Aging Services, Pennsylvania Department of Agriculture, local VFWs, Indiana Regional Medical Center, and ICCAP.
- Develop a volunteer structure to support expansion of programs and offerings of the Market.
- Work with local, state, and federal agencies to connect the Market with programs and grant opportunities.
- Work with entities that distribute SNAP and food vouchers to ensure the Market is listed as an approved place to shop.

The information complied from this study is a great opportunity for the leadership of the Market to reflect on current practices and develop a plan. Practical, and often free, adaptations are within reach to grow and enhance the reach of the Market.

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