

FARMERS MARKET IMPACT STUDY DOWNTOWN FOND DU LAC MARKET PROFILE

The Downtown Fond du Lac market is estimated to be in its 45th season in 2016. The market is coordinated by the Downtown Fond du Lac Partnership (DFP), and is located on-street in a 4-block area along South Main Street. The market runs from early May through the end of October and includes a Saturday morning market and a Wednesday afternoon market. The Wednesday market suffered from difficult weather conditions for much of 2016 and remains significantly smaller than the established Saturday market. Because the market spanned a long season, the average temperature on the day of the market ranged from 36 degrees to 88 degrees. The effect of this swing on attendance and purchasing will also be considered.

Although the Saturday market has been occurring for more than forty years, DFP received a Farmers Market Promotion grant from the USDA for the 2015 year, which allowed them to relocate and expand Downtown Fond du Lac Farmers Market with the goals of increasing fruit and vegetable access, availability and affordability to low food access consumers and increasing general attendance and farmers' sales at the market through an extensive marketing campaign. In 2016, the market received a Farmers Market SNAP Support Grant to specifically target marketing to diverse communities and increase SNAP usage through 2018. Promotions activities as part of this grant included translation of numerous marketing materials and production of a short farmers market promotional video for social media narrated in English, Spanish and Hmong.

ECONOMIC IMPACT

Vendors and customers attracted to downtown for the farmers market contribute significant energy and economic vitality to both the downtown and the region. Including retail sales at the market and adjacent businesses, employment earnings and taxes, plus relevant multipliers, the economic impact of the event in 2016 is estimated to represent:

- \$1.1 million in additional economic activity and 5 jobs in downtown.
- \$2.2 million in additional economic activity and 22 jobs in the Fond du Lac Metropolitan area.

The market also contributes to the community in non-monetary ways, including the nearly \$4,000 worth of volunteer time dedicated to the market and more than 20,000 individuals who participated in various health, fitness and educational events and demonstrations taking place at the market over the course of the season.

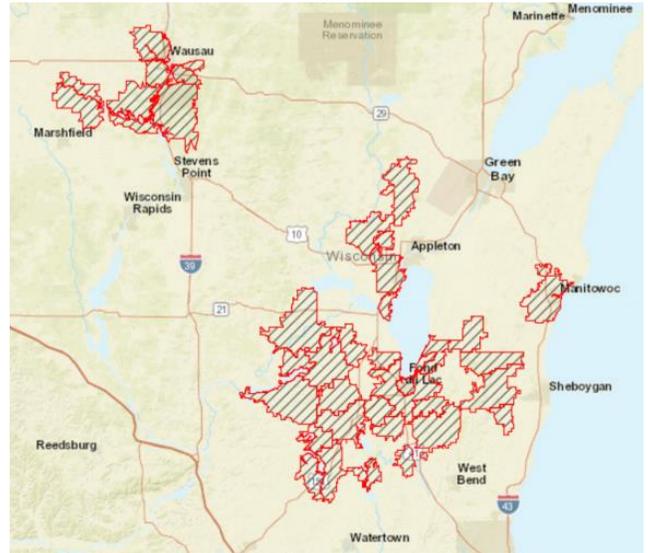
VISITOR & VENDOR PROFILE

Economic impact and success of market depend on the makeup of vendors and visitors that attend the market. This section explores the characteristics of vendors and visitors present at the Fond du Lac market.

Vendor profile

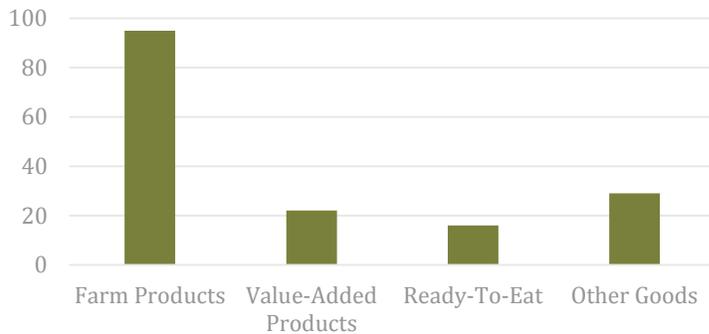
In 2016, Fond du Lac’s Saturday market included goods and produce from 81 total vendors. Because of the seasonality of produce and products, the market featured an average of 37 vendors per week ranging from a low of 21 vendors at the final market to a high of 52 vendors over the fourth of July weekend. Each vendor appeared at the market an average of 10 times, 13 percent attended at least three-quarters of market dates, and forty-three attended five or fewer markets. There was no pattern in the type of vendors which appeared multiple times versus those appearing sporadically, with a similar mix of goods available at most markets.

Vendor Location of Origin



Vendors at the Fond du Lac market come from a broad geographic area, as shown on the map above. While 49 percent of vendors travelled from the City of Fond du Lac or immediately adjacent towns or cities, a majority travelled significantly further, including the agricultural areas around the Fox Cities as well as Wausau and Milwaukee metro communities.

Goods Offered by # of Vendors



Of course, the amount of vendors offering various types of goods for sale influences overall sale patterns, which vary by week. The chart above illustrates the seasonal breakdown of Saturday vendors by the type of products sold. Vendors offering more than one type of product (i.e. farm goods plus value-added products) are included in both categories, so totals will add up to more than the 81 total vendors. In this study, farm products include fresh foods planted, grown and harvested with no or minimal processing. Value-added projects are those that are made from raw ingredients that they produce and process through baking, cooking, canning or other preserving or processing. Prepared or Ready-To-Eat food includes products that are made from goods primarily purchased and intended for immediate consumption. The other category includes artisan crafts or other handmade goods, typically non-food related.

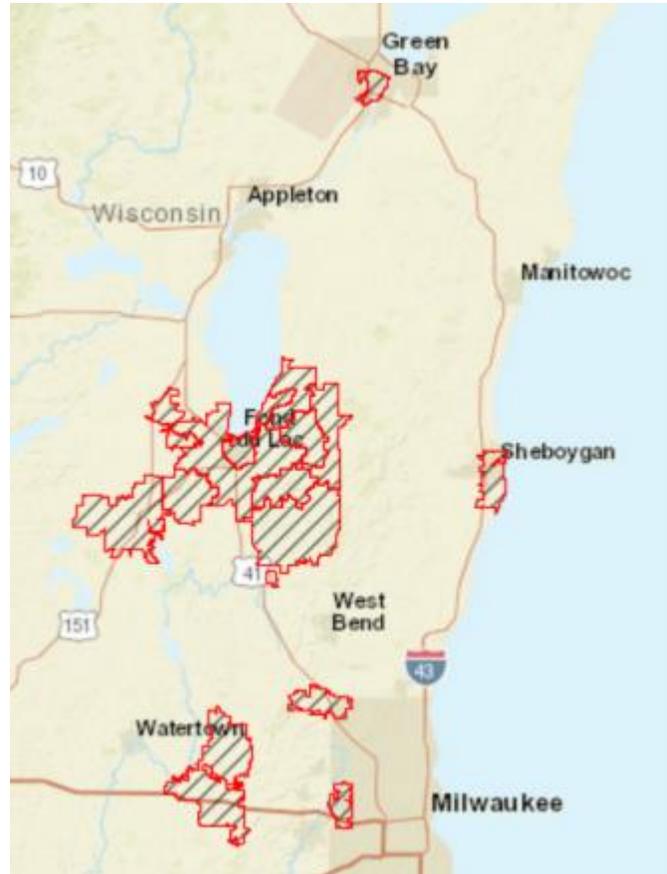
Visitor profile

In contrast to the vendor slips, which were recorded weekly, visitor counts and surveys were conducted only three times during the course of the season. These counts occurred at various points in the season and included normal activity dates as well as event dates. Surveys were conducted by interviewing every 24th visitor entering the market with a goal of achieving a pre-determined and standardized minimum threshold of surveys based on market size.

Over the season, the Saturday market attracted approximately 54,000 visitors to downtown, with the Wednesday market attracting an additional estimated 3,000. Attendance fluctuated based on the weather and time of year, with the average Saturday market in Fond du Lac attracting approximately 2,200 visitors, with the total number of customers increasing steadily from the 8 am opening through 11 am, and then declining for the final hour of the market. As with vendors, visitors to the market traveled from a large geographic area, as shown in the map at right. In total, 91 percent of visitors to the market were from the City of Fond du Lac or immediately adjacent communities, 4 percent traveled from tertiary markets generally 10-30 miles distant, and an additional 4 percent from communities much further away, including out of state visitors.

Although visitors were not asked specifically if the market was the main purpose of their visit, the fact that 45 percent of visitors did not anticipate any additional spending outside the market indicates that this is likely the case. Given the geographic dispersion of visitors, it is not surprising that the vast majority arrived via automobile. Overall, 21 percent of visitors reported walking or biking to the market. No other modes of transportation were reported.

Visitor Location of Origin



CUSTOMER SPENDING

Customers at the market spend dollars both at the market and at other downtown establishments as part of their trip. Both types of spending are important factors when evaluating the success of the market from a downtown development perspective.

Market Spending

Over the course of the season, the market generated \$254,070 in total estimated sales, a 35 percent increase over 2015. Sales were highest during weeks with more visitors, although visitors during poor-weather weeks were more dedicated to the market, resulting in higher per-visitor spending during these weeks. In contrast, high attendance weeks seemed to include a greater share of attendees who purchased limited or no goods (whether because they were there for ambiance, or because high traffic made purchases more difficult), resulting in lower total sales than would otherwise be expected based on per visitor spending averages for the entire season.

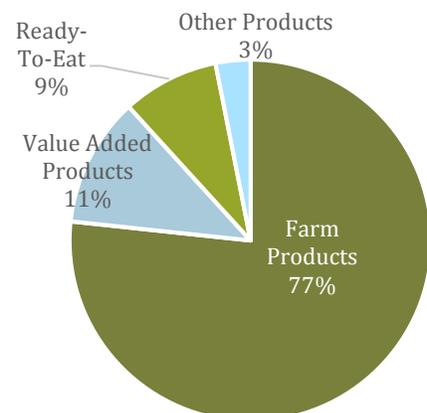
Virtually all market spending was conducted in cash, although \$4,375 in SNAP dollars and \$5,400 in credit/debit sales were collected at the market. These purchases were made possible through a token system. Customers were able to visit a central location to purchase market tokens via credit card or EBT card, shown in the image at right.



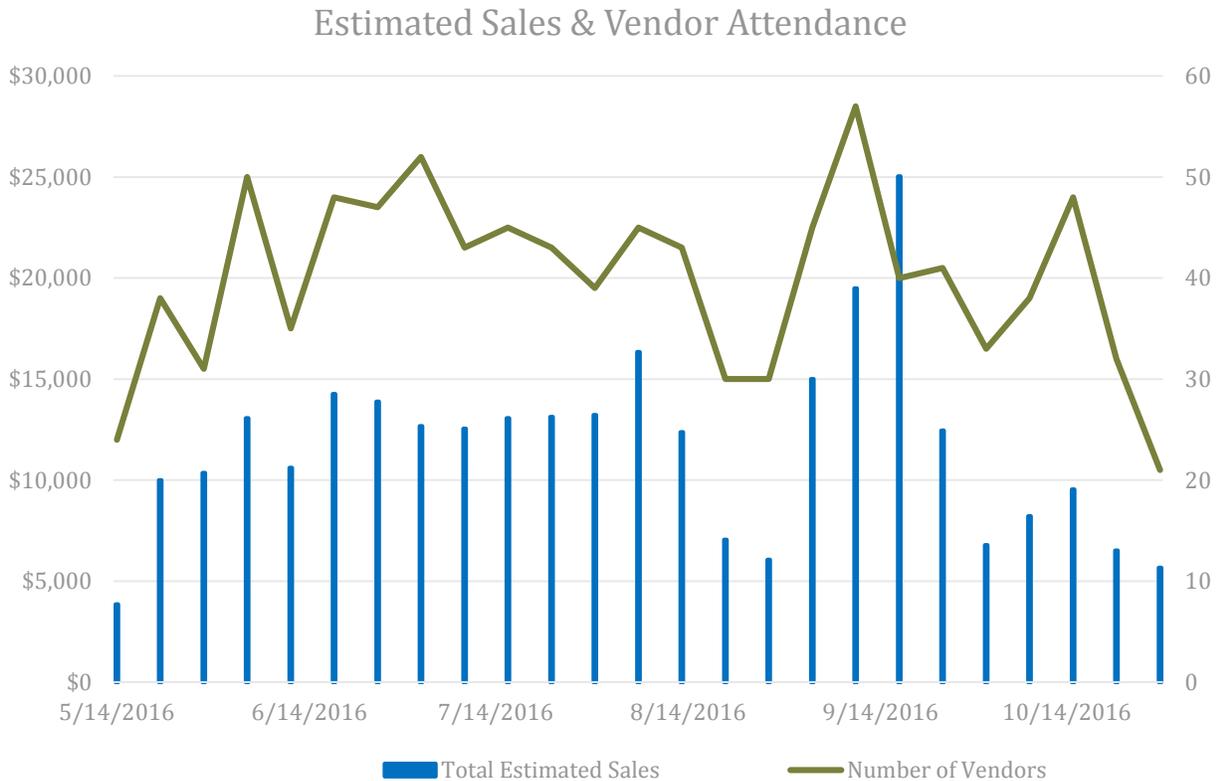
The average EBT transaction was just shy of \$18, while the average market spending for all visitors surveyed was \$22.67 per visit, or \$24.89 per visit excluding those who made no purchases on the day surveyed. It is also possible that patrons using EBT or credit made additional cash purchases while at the market, further increasing their spending. In addition to dollars spent at the market, 55 percent of visitors spent additional dollars downtown, generating an additional \$631,369 in downtown retail sales over the season.

Over the entire season, the most consumer dollars were spent on farm products, followed by value added and prepared food vendors, as shown in the chart below. Not surprisingly, the percentage of sales going toward farm products increased steadily over the course of the season as more produce was in season. Examining individual vendor sales records, individual vendors earned an average of \$272 per week, although revenues ranged from an average low of \$48 to an average high of \$638. Vendors selling non-farm and non-food items (other) represented the lowest-grossing vendors. While farm product and ready-to-eat vendors represented the highest grossing vendors.

Total Sales by Category



The average market Saturday generated \$11,500 in sales for all vendors, although sales varied widely across the season, as shown in the chart below. Variation in sales was impacted by a number of factors, although primarily temperature and number of vendors.



Downtown Spending

In addition to dollars spent at the market, many visitors also visited merchants elsewhere in downtown, whether for dining, shopping or services. Just less than half (45%) of visitors surveyed reported spending additional dollars downtown as part of their visit to the farmers market. Of those spending additional money downtown, the average per person expenditure outside the market was \$27, or \$11.63 per visitor including those who made no additional purchases. Despite this outside spending, visitors making outside purchases had similar spending habits at the market, although visitors who spent nothing at the market were also most likely to make no additional purchases.

METHODOLOGY

This study was completed as part of a national pilot study conducted by the University of Wisconsin-Madison titled Indicators for Impact: Farmers Markets as Leaders in Collaborative Food System Data Collection and Analysis. Seven markets in Wisconsin operated by Wisconsin Main Street affiliated communities were included in the study in a partnership with WEDC which coordinated participation and provided data analysis for these markets. Data included in this report was collected through a combination of vendor applications, information collected from vendors weekly on sales, data from EBT, WIC and credit processing offered at a central location in the market, and also through attendee counts and visitor surveys conducted by market volunteers. Vendor sales slips were collected weekly, while visitor counts and surveys were conducted at three separate markets over the course of the seasons that were representative of various aspects of market seasonality and attendance.

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