

MARKET AT THE SQUARE

STRATEGIC PLAN UPDATE SURVEY RESEARCH RESULTS

PRESENTED TOURBANA'S MARKET AT THE SQUARE ADVISORY BOARD - FEBRUARY 18, 2016

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INTRODUCTION

The Community Development Services Department began a strategic planning process for the Market in 2010. This effort was in response to the Urbana City Council's goals to incorporate the Market as part of the City's environmental sustainability goals and in response to community interest in the future of the Market. A Steering Committee of stakeholders was recruited to help guide the planning process. As part of the effort of the data gathering stage, the City conducted extensive outreach, including several public meetings, a survey, and an open house. The Steering Committee studied the history of the Market as well as recent trends and issues. From this information, a mission statement for the Market was developed and a set of goals and implementation strategies were formulated. The Market at the Square Strategic Plan was approved by the city council in late 2011 and many of its recommendations have been implemented, as shown in the attached updated implementation program matrix. A copy of the 2011 Strategic Plan and updated implementation matrix is attached.

Now at the five-year mark, it is an opportune time to undertake a comprehensive review of the goals and implementation strategies as outlined in the 2011 Market at the Square Strategic Plan. A survey was implemented during the month of January 2016 in order to gain feedback on the Market's current strategic goals and to determine if they are still relevant and whether there are new goals that should be pursued. The survey was administered to gain feedback from past and present Market at the Square vendors, community groups, and patrons helping to form a blueprint from which to operate the Market for the next several years. The survey closed on January 31, 2016.

METHODS

In the development of this survey, questions were devised to match similarly with those posed in previous surveys, and to solicit information that would be internally replicable for the purposes of comparing past trends. Some survey questions from previous years were replaced with new questions that sought additional information Market at the Square staff found to be relevant with its current approach. In producing and analyzing the impact of various questions, Market staff consulted various Illinois farmers market managers, including the City of Aurora and the Executive Director of the Illinois Farmers Market Association (IFMA). Additionally, the survey questions were pre-tested on a few current Market at the Square vendors and patrons.

Market Staff also researched the practicality of an electronic-only survey, with a printable survey provided upon request. In this analysis Sterling Bollman, Marketing Intern and Market Aid, found that the City would save sufficient resources by producing surveys electronically, and utilizing social media and current Market e-mail lists, rather than providing the survey only in paper form. In addition, the survey questions are more efficiently maintained with an electronic survey and the results are more easily managed and shared across various platforms when reviewing data side-by-side. The survey was ultimately produced on the Survey Monkey (www.surveymonkey.com) platform and the link was advertised to businesses through the City's social media, marketing, and email subscription platforms online, and additional notices were mailed to vendors or community groups that do not have access to the internet.

SURVEY PARTICIPANTS

8

COMMUNITY GROUP RESPONSES

- Community group responses were obtained from past and present registered community groups from the Champaign County area.
- Community groups responding to the survey include: political groups, service organizations, school/educational organizations, religious organizations, and non-profit groups.

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VENDOR RESPONSES

- Most vendors responding to the survey have been selling at farmers markets for at least 2-4 years. Some vendors have been selling at farmers market for as many as 9-15 years.
- Vendors responding to the survey have been participating at Urbana's Market at the Square for as little as 2 years and many for over 15 years.
- Vendors responding to the survey sell products which include: produce, farm products, prepared/processed foods, concessions, and arts and crafts.
- Vendors also responded that they participate in other events including: The Holiday market, The Middle Market, The Land Connection's Champaign Farmers' Market, Sidney Home Days, Springfield Farmers Market, Hob Nob Market, Danville Farmers Market, Craft League Annual Winter Expo, and the University of Illinois Mom's Day Craft Fair.

253

PATRON RESPONSES

- The majority of patrons responding to the survey attend at least 2-3 times per season with the bulk of responses coming from patrons which attend at least once a month or more during the farmers market season.
- Patrons reported that they've been shopping at Urbana's Market at the Square for at least the past 4 years, with many having been regular patrons for more than 10 years.
- The majority of patrons note that their primary reason for visiting Downtown Urbana is to come to Urbana's Market at the Square. However, if combining their market trip with other errands, Patrons also noted visiting Common Ground Food Co-op, Amara Yoga, and The Urbana Free Library.



PATRON DEMOGRAPHICS

TOP REPORTED POSTAL CODES

61801
URBANA

61802
URBANA

61820
CHAMPAIGN

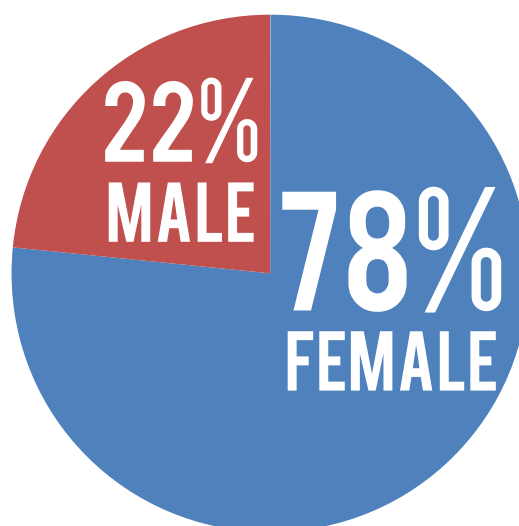
61821
CHAMPAIGN

61822
CHAMPAIGN

61874
SAVOY

\$20+

65% OF PATRONS REPORTED SPENDING AT
LEAST \$20 AT THE FARMERS MARKET ON A
SINGLE SATURDAY.



AGE

UNDER 20 YEARS OLD	1%
21-35 YEARS OLD	43%
36-50 YEARS OLD	33%
51-65 YEARS OLD	18%
66+ YEARS OLD	5%

ANNUAL HOUSEHOLD INCOME

6%
MORE THAN
\$200,000

11%
LESS THAN
\$25,000

17%
\$25,000-
\$49,999

18%
\$50,000-
\$74,999

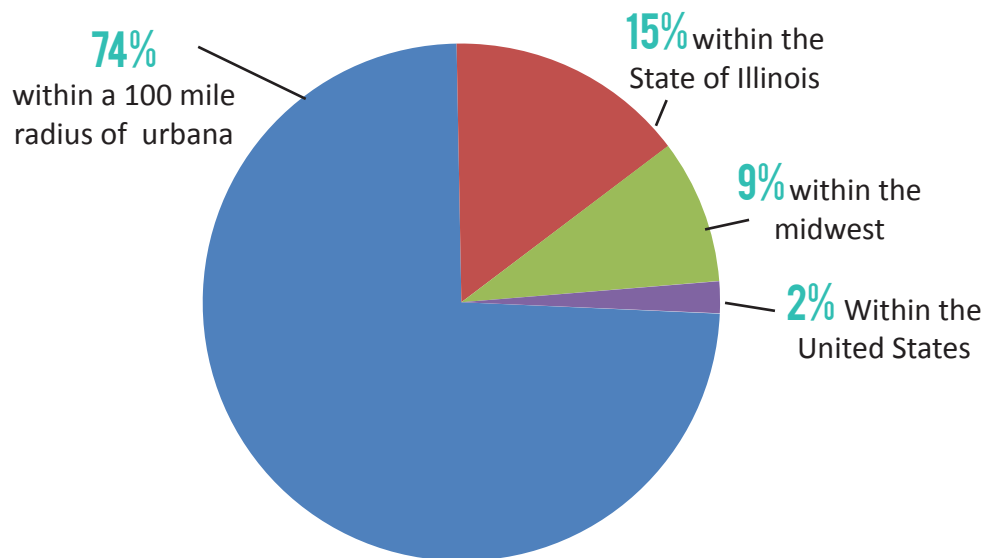
21%
\$75,000-
\$99,999

25%
\$100,000-
\$199,999

DEFINING LOCAL & COMMUNITY HUB

LET'S DEFINE LOCAL...

Market staff asked community groups, patrons, and vendors to define the term "local". The question was posed to ascertain what local means to our community, a key component of understanding Urbana's Market at the Square and our local food system.



IS URBANA'S MARKET AT THE SQUARE A COMMUNITY HUB?

Market staff asked survey respondents if they agree with Urbana's Market at the Square acting as a community hub.

87%
YES!

13%
NO!

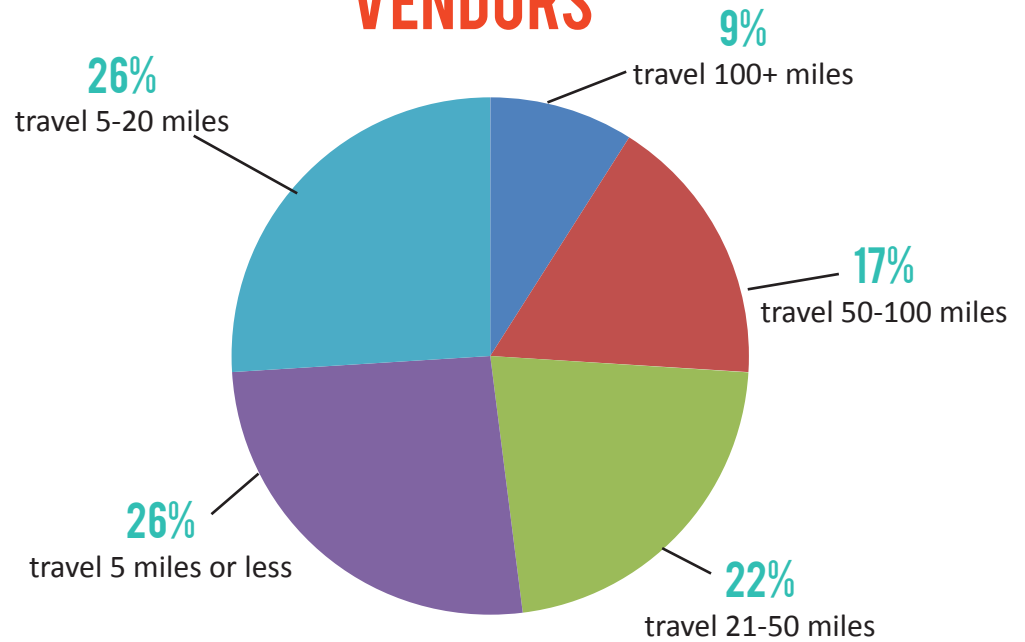
WHY IS URBANA'S MARKET AT THE SQUARE A COMMUNITY HUB?

- Both farmers & locals benefit by providing access to locally grown goods in one spot.
- Because it brings locals together outside and gives us all a greater sense of community.
- Every time I have been to the Urbana market, there are groups of people that have bumped into each other chatting; there are booths promoting events/issues happening in/affecting the community. The farmers are willing to speak to their consumers about their practices. There is always an air of positivity about the market. Based on the question, I think that's the very definition of a community hub.

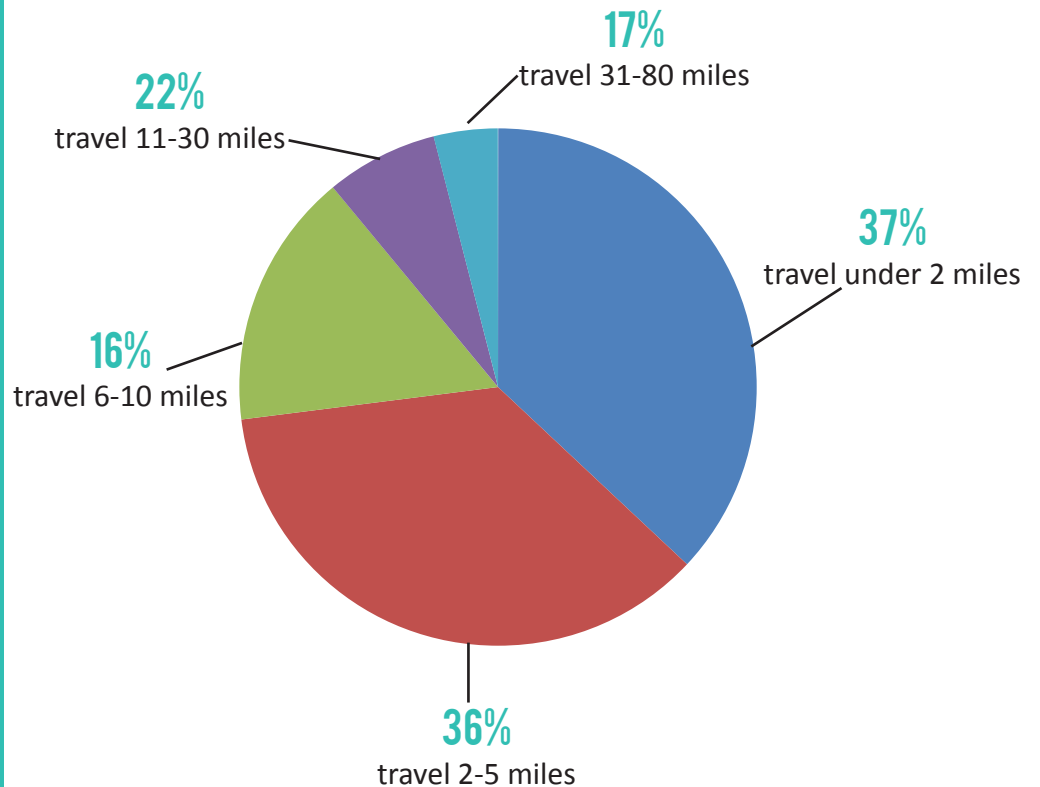
TRAVEL TIME

To better understand where participants travel from, Market staff asked community groups, patrons, and vendors to describe how far they travel to get to Urbana's Market at the Square.

VENDORS



PATRONS



UNDERSTANDING HOW PATRONS THINK

81%

OF PATRONS STRONGLY AGREE

Urbana's Market at the Square is a good use of public space.

72%

OF PATRONS STRONGLY AGREE

Urbana's Market at the Square provides access to good quality, fresh food.

71%

OF PATRONS STRONGLY AGREE

Urbana's Market at the Square is a family friendly place

65%

OF PATRONS STRONGLY AGREE

Buying at Urbana's Market at the Square has a positive impact on the local economy.

55%

OF PATRONS STRONGLY AGREE

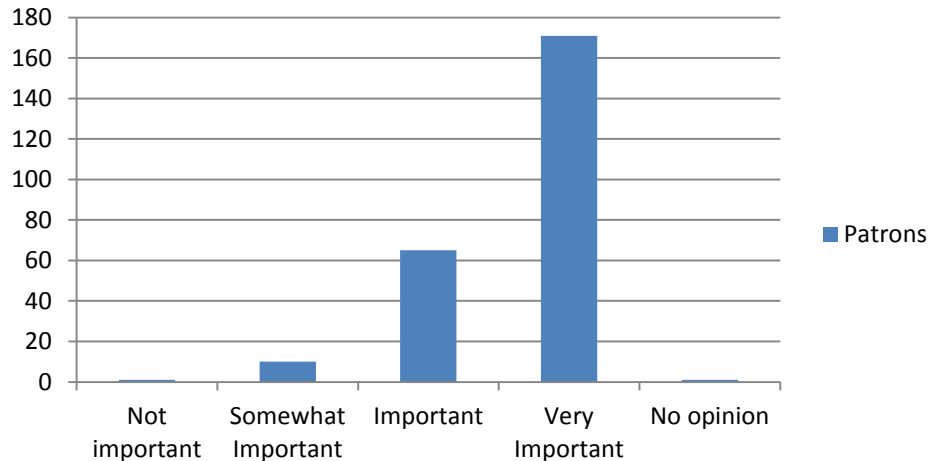
Urbana's Market at the Square feels welcoming to all people.

PRODUCT SELECTION

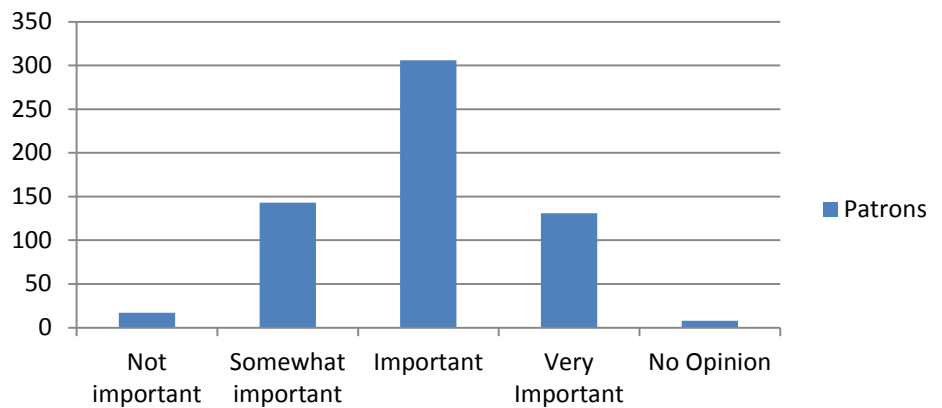
When buying food from the Market, patrons view fresh, in-season produce as the most important factor in their decision-making process. (69%)

While not as important as buying fresh produce, patrons still value food that is grown or produced locally--or at least in Illinois (82%)--as well as food that is natural but not necessarily certified organic. (42%)

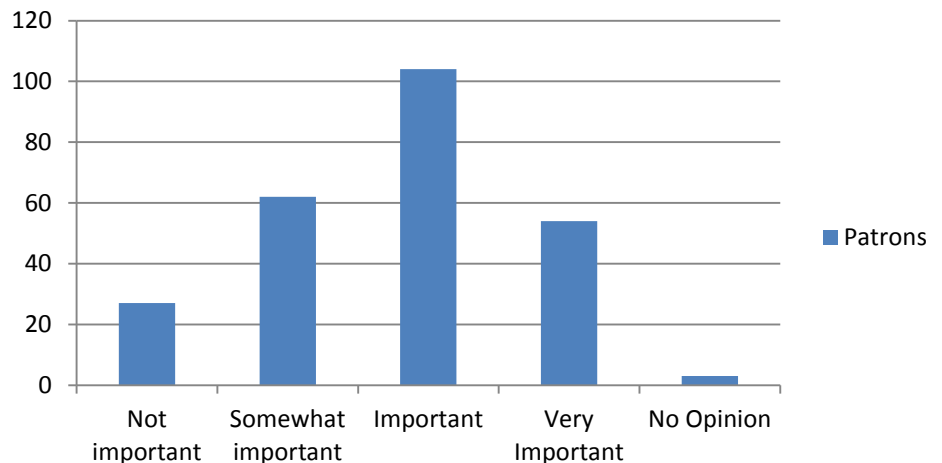
In Season (fresh)



Grown or produced locally or elsewhere in Illinois



Natural but not necessarily certified



VENDOR VIEWPOINT

WHO IN THE LARGER COMMUNITY CONTRIBUTES MOST TO YOUR SUCCESS AT URBANA'S MARKET AT THE SQUARE?

**MARKET
CUSTOMERS**
81%

**MARKET
MANAGER**
62%

**SPOUSE OR
SIGNIFICANT
OTHER**
59%

**FELLOW
VENDOR**
48%

**FAMILY
MEMBERS**
43%

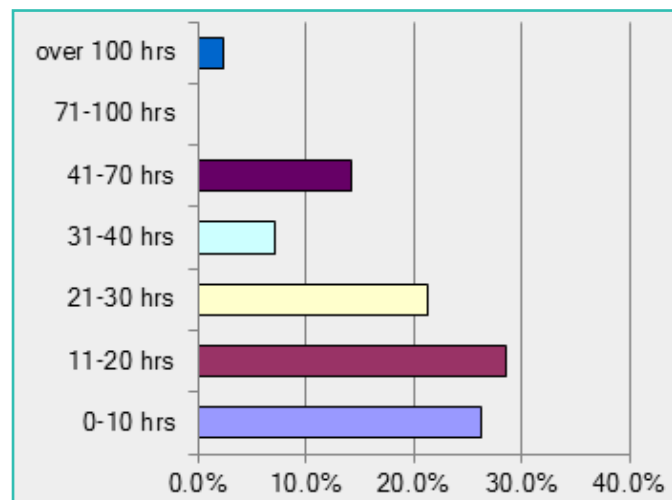
TOP 3 WAYS PARTICIPATION AT URBANA'S MARKET AT THE SQUARE ADDS VALUE TO YOUR FARM OR BUSINESSES:

BUILDING CUSTOMER RELATIONS	86%
SALES VOLUME/INCOME	76%
ACCESS TO NEW CUSTOMERS	76%

RANK THE FOLLOWING SALES CHANNELS IN ORDER OF IMPORTANCE TO YOUR FARM OR BUSINESS:

1. FARMERS MARKETS
2. DIRECT TO RETAIL
3. FESTIVALS/EXPOS/EXHIBITIONS
4. DELIVERY AND DIRECT SALES TO FRIENDS/NEIGHBORS

DURING THE MARKET SEASON, WHAT IS YOUR WEEKLY TIME COMMITMENT REQUIRED TO PARTICIPATE IN URBANA'S MARKET AT THE SQUARE?

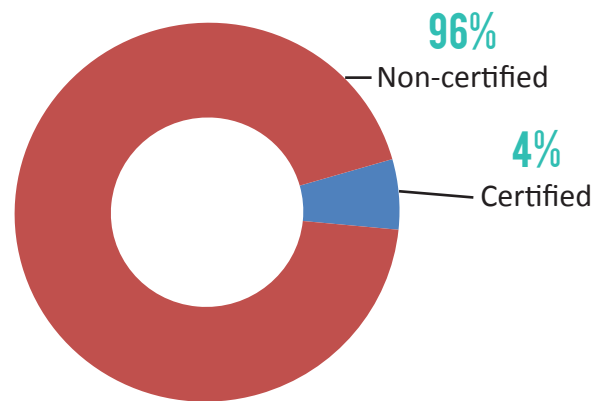


AGRICULTURAL ASPECTS

AGRICULTURAL PRACTICES REPORTED BY GROWERS THAT PARTICIPATE IN URBANA'S MARKET AT THE SQUARE:

CONVENTIONAL
ORGANIC (CERTIFIED)
ORGANIC (NON-CERTIFIED)
HEIRLOOM OR HERITAGE
BIODYNAMIC
HOTHOUSE
HYDROPONIC
PERMACULTURE
NON-GMO

CERTIFIED ORGANIC FARMERS / RANCHERS AT URBANA'S MARKET AT THE SQUARE



REASONS STATED FOR NOT HAVING PURSUED ORGANIC CERTIFICATION:

- Yearly expense and the fact that it really hasn't held me back from new relationships with new customers. We do follow all the organic guidelines and have practiced an all-natural approach since forming the farm in 1996.
- I view the whole movement of certification as illegitimate and means for middlemen to get money for providing the illusion of transparency. Auditors never reject their clients because it would be biting the hand that pays them. I have seen too many "organic" farms that spray inorganic chemicals on regular basis. I view transparency and closer relation to customers and random produce testing as true solutions.
- My farm is small so it's very expensive. Also I use more strict practices on my farm than what certification would require and I do it because it's the right thing to do. I don't need to pay the government for a label when I educate my customer and have an open door policy on my farm.

65%

OWN LAND

24%

LEASE LAND

33%

WOULD LIKE TO PRODUCE MORE

DETAILED FEEDBACK

PATRON OPEN-ENDED QUESTION:

What things would you like to see at Urbana's Market at the Square that are not there now?

- More bicycle parking. Better crossing on Vine St. DEFINITELY a safer crossing on the pedestrian path across Illinois on the Southwest Entrance to the Market Because it's an extremely effective way to bring residents, local businesses, and small organizations together. It's the largest, most consistent gathering of those three groups in the area.
- Spices and more international items and baked goods, more meats and cheeses.
- I would like to see a shuttle from lower income regions to the market every Saturday so more people can take advantage of the LINK program (which I love and should be better advertised).
- More prepared food for consumption there such as more food trucks, more shaded places to sit and more shade in general, make it easier for people to perform at the market.
- Shell peas, Italian green beans, more specialty vegetables and more signage to clearly indicate where food comes from and how it was grown.
- More garden items like mulch, landscape materials, etc. more food trucks.
- More space between tents for "visiting space" so that people can step into these areas to visit with friends they meet without clogging the main walkway or entry to the booths. The market has been so successful, I would hate to change much! The musicians have always been good, but this past summer there was an annoying one who played the same simple songs over and over...perhaps some screening will be needed. I think it is important for the vendors that the market draws as many people as possible who will buy their products as opposed to providing space and activities to keep the same people there longer. Good vendors and a variety of vendors will continue to come only if their income justifies it.
- Year round. Needs a permanent facility.
- Could be nice to have more local restaurants serving food. And more seating? One thing I have appreciated about farmers markets in other places I've lived was their location in parks so people could eat, sit and listen to music, let their kids/dogs run around on the grass, and shop.
- More black owned business / farmers

How do you engage with the farmers market?

- My family shops there weekly & have become good friends with a number of the farmers. We love getting breakfast & meeting up with friends. We're always sure to tell out-of-towners about it.
- Breakfast on a Saturday morning, buying fresh fruits and veg for our household for the week following. Buying flowers, honey, popcorn, meat etc.
- I mostly shop for vegetables, but enjoy the local wines and breads.
- I come for what I need and leave because it's getting too crowded in the fresh veggies aisles and other patrons are rude. I was disappointed when you banned dogs. I think large stroller systems need to be limited as they take up too much space and parents push them into foot traffic so they can get closer to tables. I just don't enjoy going as much as I used to.
- I follow the market Facebook page and Instagram account to keep up to date with news and events.
- Internet, facebook, website (could use some work), in person.

DETAILED FEEDBACK

VENDOR OPEN-ENDED QUESTION:

Do you have any additional comments you would like to add?

- This market is the right size and frequency. Altering this would be a mistake. The same would be true of the location and day. I have seen various markets fail because somebody wanted to make changes; leave well enough alone.
- Yes. The handbook clearly lays out a flow for traffic to get into and out of the festival. Unfortunately, food trucks have their service windows on the passenger side of the vehicles, and so are required to park and drive opposite the planned traffic flow. I recommend having food trucks park on the north lane, then they can pull in and out quickly and go with the traffic flow instead of against it.
- Great staff makes it easy and fun.
- For us, the Market has grown to a wonderful money-making opportunity, a chance to learn a good deal about
- Marketing, nearly all of our social life (really . . . that's all the social life we have!)
- When we started selling over 10 years ago at the Urbana market we only competed with 3 other bakers and now at last count we have between 13 to 15 bakers to compete with and the majority of them fall under the cottage laws. Not only is it unfair and costly for us to have to follow health regulations when they do not (especially to provide samples) but there have been times when our fresh baked goods have been tainted by putting either a soap vendor or a vendor demonstrating a scented product next to us. I suggest that crafts be separated from foods instead of being interspersed.
- Local is really a big thing. You have people coming in from southern Illinois. That is not local. This hurts your local people.

What value does contact with other vendors at this market provide?

- They are my family and support group. I believe we all want to be successful in our endeavors and the willingness to work together through referral or knowledge of product is really superb. So, great value I need my family and friends.
- We've made some wonderful friendships with other vendors, gained the knowledge that if one of us is ill or otherwise to get to the market, our vendor neighbors will help. We learn from another of our vendor neighbors a little about the UBA, as he is a member of it. Shucks, one of us is usually so busy she's not able to wander through the market and make contact with other vendors.
- Marketing opportunities; learning how to compete with the vendors who are selling under the "cottage law"; working together and endorsing/supporting each other.
- Opportunities to do cooperative sales and events. Some sharing of best practices and sales info. Camaraderie
- Market research and investigating economic niche.
- As a new vendor, other vendors have been supportive and welcoming. They have also given me ideas for new products.

SUMMARY RESULTS & CONCLUSION

Overall, the survey results are generally positive and supportive of Urbana's Market at the Square. Nearly all vendors, patrons and members of community groups find the market to be a place that fosters supportive relationships, lasting friendships, and grows knowledge of local farms and food. While most people prefer the Market at the Square to remain as it currently stands, there are a fair number of patrons that wish to see the Market season extended. Whether it be longer hours throughout the days the Market takes place or more events throughout the calendar year (some even ask for a year-round Market at the Square at a permanent facility), patrons want more access to the Market. From the vendor's perspective, everyone seems fairly pleased with the direction of the Market, and based upon feedback, will continue to sell at the Market at the Square.

The survey has been helpful to Market staff in identifying areas to improve upon to help make the Market successful for years to come for all those that participate.

