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The demand side of farmers' markets in Kitchener-Waterloo: An examination of the Waterloo, St. Jacobs and Kitchener farmers' markets (Ontario)

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**The Demand Side of Farmers' Markets in Kitchener-Waterloo:
An Examination of the Waterloo, St. Jacobs and Kitchener Farmers' Markets**

By

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THESIS

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Abstract

Farmers' markets have traditionally been outlets for a variety of everyday food items, many sold by local farmers. Today, many markets have changed from their original function, and now offer a variety of goods to a wider variety of people both demographically and geographically. In the Kitchener-Waterloo area, three farmers' markets exist. the Kitchener Farmers' Market, the Waterloo County Farmers' Market and the St. Jacobs' Farmers Market. These markets, identified as recognisable farmers' markets (Tunbridge 1992), differ from other market typologies including traditional markets, public markets and festival market places. Though broad in nature, farmers' markets can be broken down into further groupings based on social-economic indicators as exemplified by the market patrons.

This thesis examines market differences using a customer survey administered at these three markets in November 1993. From this investigation the following market characteristics were found. The Kitchener Farmers' Market, has evolved from a traditional public market to a redeveloped, regular downtown farmers' market, attracting a primarily localized customer base who patronize the market as part of a regular shopping trip. The Waterloo Farmers' Market, a contemporary, urban fringe farmers' market, serves a similar function to the Kitchener Market but draws a regular customer base from Waterloo and the surrounding rural areas. Lastly the St. Jacobs' Farmers' Market, a day-trip recreational market, attracts a customer base from a wide area, offering goods of both a farmer and flea market nature, including a weekly livestock auction. The typicality of these inter-market differences are vis-a-vis other market locations.

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Chapter 1

Introduction

Canadians today are increasingly drawn to farmers' markets to relive a shopping experience full of tradition, including the sights and sounds of vendors and buyers haggling over prices, the smells of fresh baked goods and fresh fish and the bustling activity of people walking and milling about. The modern term of "farmers' market" refers to an assortment of marketing activities recognized as anything from a group of farmers selling produce from the back of their trucks, to an enclosed building displaying a multitude of vendors' wares including plants, vegetables, crafts and home-baked goods. A farmers' market is a market that provides the opportunity for the direct sale of produce from farmers to consumers or retail buyers (Neuwirth, 1990, 12).

Farmers' markets have always thrived in Waterloo County as the area has one of the richest agricultural landscapes in the country, with many local German and Mennonite settlers providing an environment ideal for farmers' markets. As the Kitchener-Waterloo area contains three farmers' markets, all of a relatively large size, it was considered an ideal study area to examine this increasingly popular retail environment, its patrons and its evolution in this area.

1.1 Purpose

The purpose of this thesis is to study three farmers' markets in Kitchener-Waterloo and discover the role market patrons play in the local retail market environment. In this research, the phrase "farmers' market" is a continuum of the following supply side categories. from a *true farmers' market* containing primarily farmers' products, to a *public market* that is a mixture of farmers' goods with a greater commercial component, to the *festival marketplace* that comprises the greatest commercial and/or flea market component. As these definitions deal with the established supply side characteristics of farmers' markets, an effort was made in this research to examine the consumer or demand side characteristics of farmers' markets.

The three local farmers' markets will be examined and contrasted, using a questionnaire that examines the effects of location, attitudes and behaviours of patrons at the farmers' markets. The process of consumerism at a farmers' market is unique in terms of a retail activity. Forms of retail establishments such as grocery, convenience and department stores are ubiquitous. Farmers' markets, however may only exist in one location within a community, if at all. Besides being located singularly within a community or town centre, farmers' markets also exist on the urban fringe or in the country. Consumers have become drawn to a retail activity that may not be close to their residence, but offers goods that are more desirable than similar goods that may be found closer (ie. a local grocery store). As food shopping is an activity performed by most consumers, the farmers' market becomes an important alternative that affects the urban flows of consumers.

The study of farmers' markets is also practical from both a marketing and business perspective. It is important in business to be knowledgable about customers in order that the business remains successful in the future. In addition, different types of customers may be drawn to the individual markets based on their location and type of goods they offer. By understanding these customer nuances, the markets themselves can improve on their composition, design and operation times in order to react to their customers' wishes. In this farmers' market study, specific questions are asked of the patrons that examine their journey to and from the market, including the actual farmers' market visited.

1.2 Background

1.2.1 Farmers' Markets Location

The location of the farmers' markets for this research is Kitchener-Waterloo, plus the bordering southern portion of the Township of Woolwich. In this area, three farmers' markets can be found. the Kitchener Farmers' Market in Downtown Kitchener at Duke and Frederick Streets and the St. Jacobs and Waterloo County Farmers' Markets located adjacent to each other on Weber Street, just north of the City of Waterloo boundary. Two maps examine the relative location of the farmers' markets in Kitchener-Waterloo and to each other. Figure 1 1 examines the location of farmers' markets in Kitchener-Waterloo while Figure 1.2 provides an aerial view of the Waterloo County Farmers' Market and the St. Jacobs Farmers' Market.

Figure 1.1 - Location of Farmers' Markets in Kitchener-Waterloo

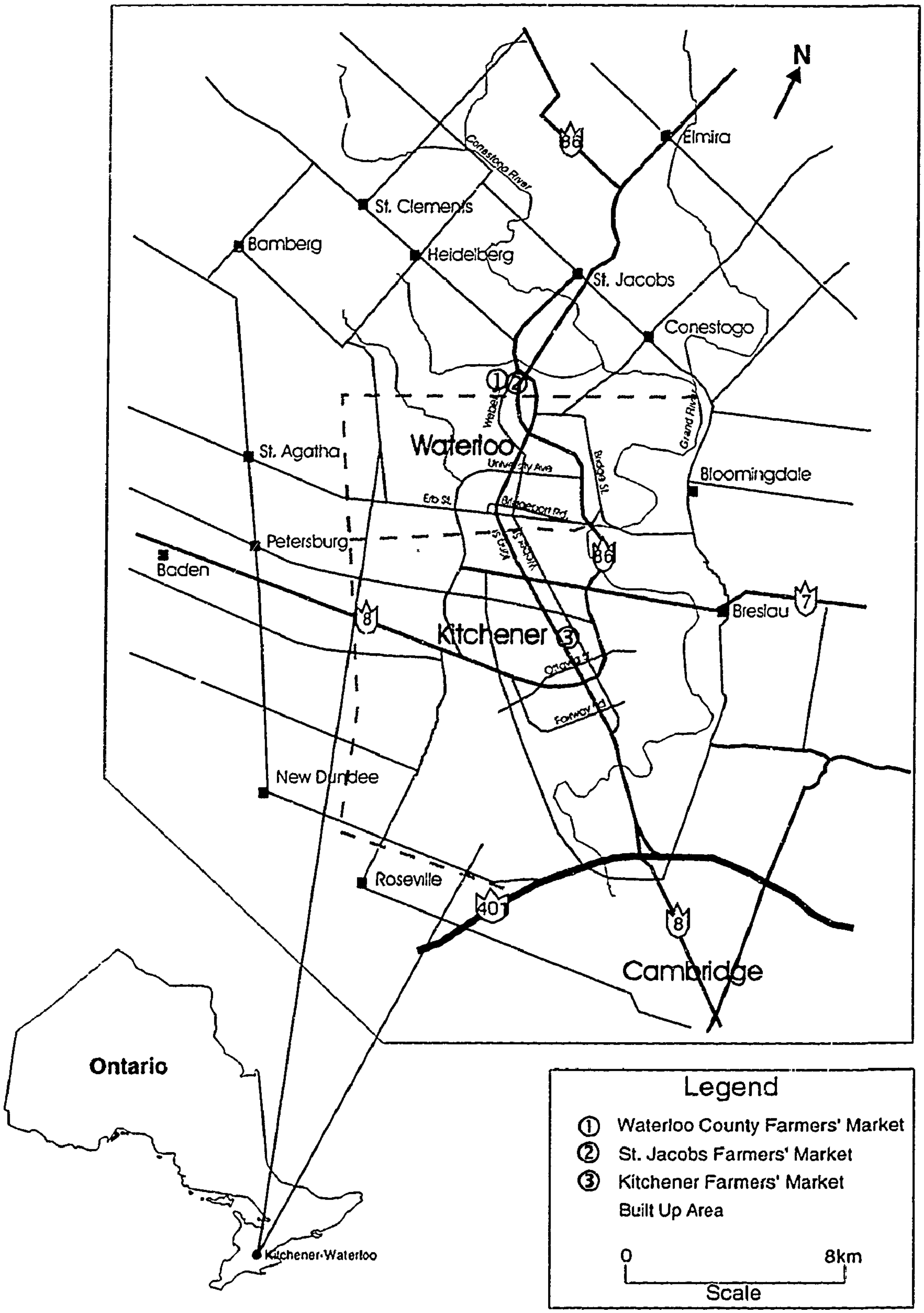
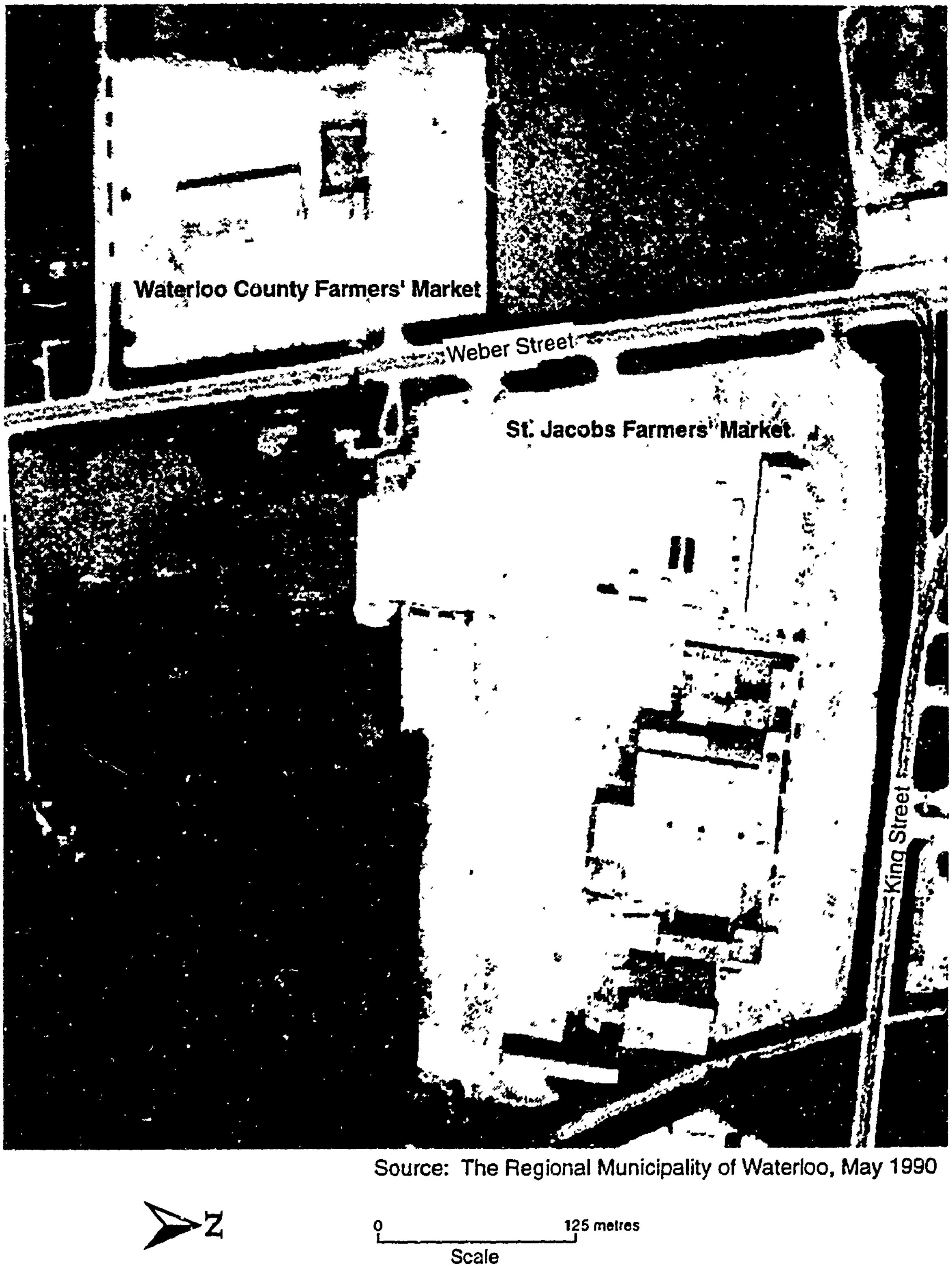


Figure 1.2 - Aerial Map of the Waterloo County Farmers' Market and the St. Jacobs Farmers' Market



1.2.2 Research Procedure Overview

A survey of patrons was undertaken at the three farmers' markets in Kitchener-Waterloo (St. Jacobs, Waterloo County and Kitchener Farmers' Markets) on two consecutive Saturdays in November 1993. The questionnaires were administered by university students at each market. A customer questionnaire was used as it was the only cost-effective and reliable means of obtaining a large amount of data on farmers' market customers within a specific time period. In addition, this type of questionnaire had been used previously in other farmers' market studies and has achieved desirable results for the researchers.

Each questionnaire was identical for the three markets and consisted of three parts. The first part addressed a number of questions that dealt with their journey to the market. These questions were important in assessing travel and shopping patterns of the market patrons. After the journey to the market, questions were posed that examined the customers' attitudes once inside the market, both qualitatively and quantitatively. This information was important in determining the characteristics that were meaningful in the farmers' market experience. A final section of questions was included that examined the demographics of the customers to determine the status of the individual in terms of their sex, age, education, and employment. Overall, the customer questionnaire was important in acquiring on-the-spot information about customers coming to the individual farmers' markets.

1.3 Conceptual Framework

1.3.1 Specialized Retail Environments

In order to understand farmers' market in the retail environment, it is important to examine research regarding markets on the supply side. Several researchers have examined farmers' markets as specialized retail environments. Berry (1967) saw this environment as an alternative to the planned and unplanned centres that were appearing in urban areas. Jones & Simmons (1993) called the area where markets appeared as special product areas, areas that offered a variety of goods in a specific region such as a downtown or periphery area of a city. A further analysis of the specialized retail environment is examined in Chapter 2.

1.3.2 Customers and Retail Environments

In addition to specialized retail environments, research was completed on the demand side of retail environments including customer behaviours, attitudes and perceptions of their environment. Christaller introduced the concept of Central Place Theory, a theory that assumed consumers exhibited economically rational shopping behaviour. However researchers after Christaller have shown that consumers are different and have shopping routines that are not always economically linked. For instance Stone (1954), Harvey (1969) and Hoggart (1978) recognized other factors in shopping such as interpersonal differences among consumers that would determine their respective shopping characteristics. Consumer shopping behaviour can be based on the consumers' feelings towards a specific shopping activity that allows for the building of a shopping strategy. In the farmers' market example, consumers may travel longer distances to a farmers' market to purchase goods perceived to be fresher or cheaper, though they may be identical to goods sold at a local grocery store. In addition to individual preferences, group preferences may come into the equation. For example, university students may have different shopping perceptions and attitudes from retired couples. In this way, customers' feelings, attitudes and behaviours are important in understanding the demand characteristics of farmers' markets in the retail environment.

1.4 Approaches to Farmers' Market Studies

Different approaches have been taken in the literature to examine both the retail system of markets (supply side) and the consuming side of markets (demand side). Rawls (1965) and Hades (1976) both examined the Kitchener Farmers' Market from the demand side. Consumer attitudes, behaviours, strategies and patterns were studied to construct a customer makeup for the market. Afterwards, a study by Zundel (1982) examined the supply and demand sides of the Waterloo County Farmers' Market. It was not until the study by Scriver (1990) that the three local markets were studied together, including the St. Jacobs, Waterloo County and Kitchener Markets from the demand side. The Kitchener Market however was not fully examined as secondary data was used in a comparison with the Waterloo and St. Jacobs Markets. In all of these local studies, there has not been a detailed study of the differences in the consumers that patronize these three markets. In addition, market types or categories based on the customer types or demand characteristics, have not been established in any of the studies .

1.4.1 Market Categories

Farmers' markets can be broken down into different categories as they do not all share the same characteristics. In most of the definitions, farmers' markets are divided into three or four categories. Tunbridge (1992) divided farmers' markets in four types, including traditional markets, recognizable farmers' markets, public markets and festival marketplaces. Hence, Tunbridge recognized that farmers' markets were not all the same yet they share some unique characteristics that could be represented on a continuum. At one end of the continuum, the farmers' market contains purely farmers' goods, as is with the traditional market. At the other end exists a farmers' market that has a large proportion of goods of a commercial nature representing more of a festival marketplace. Other authors such as Neuwirth (1990) have expanded definitions of farmers' markets that not only include goods sold, but also the location and type of customers serviced by the markets Neuwirth stated that the "true" farmers' market contained primarily farmers' goods, sold directly to consumers or wholesalers. The public market differs from the previous farmers' market by selling more mixed goods in addition to farmers' goods and deals only with the retail public. A final example of the farmers' market used by Neuwirth was the festival marketplace that contained many vendors not of a farmer type, who were more commercially oriented to the general public. Again a continuum of goods exists, from purely farmers' goods at one end to more commercial goods at the other. Neuwirth also divided farmers' markets based on their locations in space. His first classification was the downtown retail market, commonly found in city centres serving a pedestrian and public transit population. The second type was the suburban/regional market, larger in size to the downtown market and usually found in peripheral areas of a city. The multi-regional market was the largest of the three types of markets, usually found in rural areas and comprising of a significant wholesale component. As it can be seen, farmers' markets are not all the same and differ with the type and number of goods sold, location and size.

1.5 Summary

In this thesis, the demand side of three local farmers' markets in Kitchener-Waterloo will be examined. The idea of different market categories will be explored on the assumption that different customers patronize different markets based on their personal shopping attitudes, perceptions, behaviours and patterns. It is expected that differences will be found in the customers that will distinguish the individual farmers' markets from each other In addition, a historical comparison of Scriver's (1990) study of three farmers' markets will be made with the results from this study as it is the most detailed of the local studies and uses a questionnaire that is compatible with this current study.

1.6 Thesis Outline

The next section (Chapter 2) examines the literature associated with the farmers' market topic including a historical review, categories of markets, specialized retail environments, central place theory, shopping strategies and farmers' market literature reviews. Following this, Chapter 3 explores the methodology associated with the farmers' market study. Chapter 4 examines the results from the questionnaire administered at all three local markets and uses them in a comparative analysis with a recent farmers' market thesis by Scriver (1990). The thesis ends with Chapter 5, which summarizes the results of the thesis and presents conclusions.

Chapter 2

Literature Review

This chapter examines the literature in the field of farmers' markets. The review is categorized into five different sections. The first section deals with the history of farmers' markets, with specific examples drawn from Canada. The next section examines the types or categories of farmers' markets. Literature will be examined as it relates to farmers markets as specialized retail environment, central place theory and theories in shopping strategies. A final section will deal with literature that has specific reference to the Kitchener-Waterloo markets. The chapter will then conclude by raising questions from the literature and posing hypotheses based on these questions.

2.1 History of Farmers' Markets

Farmers' markets first started when enough people in a community combined their talents and goods and gathered in a particular location to sell their wares. This location would be a central place where many people would have easy access to the market. These early markets relied heavily on the barter system where many farmers exchanged goods. Markets that started in Greece and Rome were set up for the benefit of everyone in the community. Rules and regulations were established to ensure that the supply of goods was constant and at a reasonable price (Biesenthal, 1980, 2-4).

Throughout their long history, farmers' markets have shared three main features: markets were open to all buyers and sellers in the community, products featured at the markets were local in nature (mainly food products) and markets incorporated rules to protect consumers from unethical vendors who often offered inferior products (Biesenthal, 1980, 24).

In Canada, European-type markets first appeared in the evolving urban centres. Halifax and Toronto became the first two places where markets materialized. As towns and villages grew to about 500 in population in the Maritimes and Upper and Lower Canada, farmers' markets began to appear usually featuring the local farmers' surplus goods. By the mid-nineteenth century, market houses were built in most towns to protect vendors from the weather and to ensure a continual supply of goods. Competition appeared in the food service industry by the nineteenth century as grocery stores started to open in greater frequency. These stores offered consumers a clean environment, credit, home delivery and even canned goods, something the older traditional markets were unable to offer (Biesenthal, 1980, 25-26).

By the 1950s, farmers' markets were on a downward trend, with many of the once regular customers shopping elsewhere. With the growth of subdivisions and new shopping malls, customers that once patronized farmers' markets were drawn into the wave of urban growth and modernity, called supermarkets and shopping centres, seen as a refreshing change from the dreary and old-fashioned farmers' markets. Many market properties which were located on central and valuable city properties became slated for redevelopment in the downtown revitalization movements of the 1960s and early 1970s. This was the case for both the Kitchener and Waterloo markets as both of the original buildings were demolished for central business district (CBD) redevelopment. In Kitchener the new Market Square shopping centre was built and included an area to house the new Kitchener Farmers' Market adjacent to the parking garage. The market in Waterloo was not replaced in its original location and instead a modern office structure known as the Marsland Centre was constructed in its place (Biesenthal, 1980, 29).

In the early 1980s and 1990s, farmers' markets enjoyed a renaissance as their popularity with the public expanded. This revival witnessed consumers coming back and being reintroduced to farmers' markets. According to Robert Chorney, executive director of Farmers' Markets Ontario, in 1988 there were 60 farmers' markets in Ontario. Just five years later, this number had doubled to 120. Today, many Canadians are increasingly drawn to farmers' markets to relive a shopping experience seen as a refreshing change from shopping centres and grocery stores, the same activities that drew customers away from the markets only a few decades earlier.

2.2 Farmers' Markets Characteristics

In the book *Urban Markets - Developing Informal Retailing*, Dewar and Watson (1990) examine urban and farmers' markets in the context of their economic benefits and stimulation for the informal sector of the economy. Urban markets are defined as the "physical agglomeration of small traders and producers" (Dewar and Watson, 1990, 10). In their approach, the authors examined categories of differentiation that existed with urban markets located in foreign cities including Bombay, Colombo, Bangkok, Hong Kong and Harare (Zimbabwe). Five main categories existed that differentiated these and other urban markets. The first category looked at the nature of supply, breaking markets into wholesale and retail. Wholesale markets are the bulk distributors or source for retail markets, while the retail markets break the bulk goods down and directly serve the public. The second category examined the function of the markets. The function of markets, or the type of services or products of a market, emphasizes markets offering primarily mixed, food, clothing, or household goods. A third category deals with the degree of formality of the market. Here a market may contain an elaborate infrastructure that houses the vendors or it may strictly be an outside space divided into individual vendor spaces by arbitrary lines. The fourth category examined by the authors is the form of the market. This is the physical form that the market takes in its surrounding environment. In certain circumstances, a market may be within a single point in the city or it may be linear and extend along a street taking up many city blocks. The fifth category examines the time of operation of the markets involving the periodicity of the markets. Here certain markets may be classified as temporary or permanent, dependant on their times of operation throughout the day and the year (Dewar and Watson, 1990, 12-13).

When an attempt was made to apply the Dewar and Watson categorical system of markets to the Kitchener-Waterloo Region, problems were found. The categories listed were too broad when applied to the local markets. All three markets are retail markets that offer mixed goods of different proportions. In addition the markets are all of the same form, in that there is a basic infrastructure in place located in a single position in space. Also, their times of operation are all similar as they operate throughout the year on a regular weekly and twice-weekly basis. After examining these categories it can be concluded that a more detailed breakdown of farmers markets is needed in order to access the differences between farmers' markets in this area.

A more detailed examination of the different categories of farmers' markets was undertaken by Neuwirth (1990) who divides the term "farmers' market" into three types. The first type is a "true" farmers' market where there are farmers that buy and sell their own produce directly to customers or wholesalers at stalls or another type of structure. The market is structured to meet the needs of the farming community as one of its primary goals A second type of market is known as the public market. The public market focuses on the needs of the public rather than the farmers themselves. A public market sells similar goods as the farmers' market but deals only with the retail public. Besides farmers' goods and produce, the public market also sells baked goods, crafts, meat and other items that expand the farmers' markets original domain of fruit and vegetables. In many cases, the public market is publicly owned by a city and operated by managers that work for the city This has been the case as many public downtown markets have historically been publicly owned In recent times however, cities have changed the ownership of the markets to the private sector as some farmers' markets were seen as more of a liability than an asset. When more of a commercial or non-agricultural activity is added to a market, the market evolves more from a farmers' or public market to a festival marketplace. The festival marketplace has a certain feeling of a farmers' market but contains a number of vendors who do not sell farmer-type products, including fast food, souvenir and apparel vendors. The purpose of the festival marketplace is very much commercial oriented and its primary purpose is not necessarily to serve the needs of the agricultural community (Neuwirth, 1990, 12).

In an effort to break down these classes into smaller categories, Neuwirth (1990) also compared and contrasted the locations of the various types of markets. Three classifications were examined including the downtown retail market, the suburban/regional market and the major multi-regional market. The downtown retail market is the most common of the types as it has been historically found in many downtown locations of retail environments. This type of market caters to retail activity and serves the pedestrian, and public transit oriented population of the city. In addition, office workers may also be attracted to this market as it is located near their place of work. Many of these markets are publicly operated by a city. Another type of market is the suburban/regional market that often serves a suburban or metropolitan area. These markets are typically larger in size and have more buildings than their downtown counterparts. In addition their locations in the road network are often excellent making them very accessible to both consumers and producers. A final type of farmers' market is the multi-regional market that typically serves a large area. This type of market differs from the other two types as it has a significant portion dedicated to wholesale operations, which provides an interface between the farmers' and the urban markets. In addition, its physical location is usually found in more rural areas (Neuwirth, 1990, 12-13).

Another interpretation of market categories, similar to Neuwirth's classifications was made by Tunbridge (1992). Tunbridge described a four-market classification using the same three categories from Neuwirth (the true recognizable farmers' market, public market and the festival marketplace) with the addition of a traditional market category. Traditional markets, according to Tunbridge, are usually found in less revitalized urban centres and are very tradition in their appearance. His second classification of recognisable farmers' markets are markets that are more open and commonly found on the city margins in larger structures In his example he cites the markets in Kitchener-Waterloo as fitting into this category, especially the Waterloo County Farmers' Market and the St. Jacobs Farmers' Market. A third category exists with the public market that is a large market containing several different types of goods. Examples used here were the new waterfront markets in Vancouver and another waterfront market in Vieux Port, Quebec. Tunbridge's final category was the festival marketplace that he discussed as "a distinct purpose-created phenomenon" and used the Saint John Market Square as an example (Tunbridge, 1992, 280-281).

2.2.1 Categories of Markets in Kitchener-Waterloo

These categories are primarily based on the supply side. The exchange process which takes place at farmers' markets and the groups presented by Neuwirth (1990) most accurately define the different types of farmers' markets in Kitchener-Waterloo. The Kitchener Farmers' Market would fit into the public market as it caters to the general public, many of whom are local patrons and is publicly owned by the City of Kitchener. Biesenthal also claims that the Kitchener Market "is the best public market in Canada" (Biesenthal, 1980, 101). In addition, the goods sold at this market are varied and range from farmers' produce to baked goods. The Kitchener Market would also be considered a downtown, mixed retail market as its location is in the heart of the central business district in Kitchener and carries a wide variety of goods. An internal survey completed by the Kitchener Farmers' Market in 1992 examined the types of vendors at the market by the products that they sold. Handicrafts were the highest grouping with 38% of the vendor share, meat, fish and dairy at 17%, homemade and homebaked goods at 16%, fruit and vegetables at 15% and merchandise/services at 8% (City of Kitchener, 1992).

The St. Jacobs Farmers' Market is different from the Kitchener Market and would fit into the festival marketplace category as it offers the widest range of goods of both a farmer and flea market variety. Based on a survey by Wells and Muncaster (1992) in November 1992, the St. Jacobs Market had a high proportion of commercial businesses (51% of those surveyed), 35% home oriented businesses and only 14% farm oriented businesses. Home oriented businesses can be considered small businesses that are generally operated from the home. The highest proportion of vendors surveyed that particular day, sold handicrafts (45%), with vegetables and fruit vendors at 18%, homemade and homebaked goods at 14%, service oriented goods at 15%, meat/fish/dairy at 7% and merchandise/services at 7%. These numbers would support the notion that the market is not a true farmers' market as many of the products and type of vendors are of the commercial nature. However, as the vendor mixture changes for different times of the year, more vendors of one type might be more prominent during a given season, ie. more vegetable vendors in the summer and not as many in the winter.

The Waterloo County Farmers' Market contains more characteristics of a true farmers' market and it therefore should be placed in the farmers' market category. Results from a vendor survey by Wells and Muncaster (1992) found the reliance on a commercial vendor sector is less than that of the St. Jacobs Market. Home oriented businesses were more prevalent at 42%, followed by commercial businesses at 35% and farm oriented businesses at 23%. Commercial businesses are still a major influence, with more farm and home oriented businesses evident. In terms of the range of products, there is more of an equal distribution of goods across the product groups. Again handicrafts had the greatest market share at 36%

of the products, with homemade and baked goods and fruit and vegetables each at 22%, meat/fish/dairy products at 14% and merchandise/services at 4%. The service sector and manufactured merchandise type of goods was not evident at the Waterloo Market as was found at the St. Jacobs Market. A summary of these findings is listed in the table below.

Table 2.1 - Summary of Vendor Products

Products	Waterloo Market	St. Jacobs Market	Kitchener Market
Handicrafts	36%	45%	38%
Homemade/baked	22%	14%	16%
Fruit/Vegetables	22%	18%	15%
Meat/Fish/Dairy	14%	7%	17%
Merchandise/Services	4%	15%	8%
Other	2%	1%	6%

Source: Wells and Muncaster, 1992, City of Kitchener, 1992.

As can be seen, handicrafts are an important aspect to all three markets. From the Farmers' Markets Ontario Directory for 1993/94, the number of vendors and the percentage of crafts is listed for each farmers' market in Ontario. The numbers and percentages differ from the results taken on the various survey dates although the general proportions are still the same. The average sizes of the markets according to the FMO Directory were. Kitchener Farmers' Market, 175 vendors, St. Jacobs Market, 325 vendors and the Waterloo Farmers' Market, 350 vendors. As the St. Jacobs and Waterloo Markets are located on the outskirts of Waterloo, more physical space was available resulting in a higher number of vendors

Besides the number of vendors, the percentage of goods offered at the markets varied. The St. Jacobs Market had 65% crafts, the Kitchener Market 33% crafts and the Waterloo Market 25% crafts (Chorney, 1993, 27,47,61).

Therefore, the Waterloo Market had a higher proportion of true farmer market goods such as fruit and vegetables that would make it more of a true farmers' market. The Kitchener Market had more of an even mix of goods that would lend itself to being called a public market. Finally, the St. Jacobs Market had the highest percentage of crafts, merchandise and services thereby fitting into the festival marketplace category.

2.3 Farmers' Markets as Specialized Retail Environments

In order to understand farmers' market in the retail environment, it is important to examine research regarding markets on the supply side. Several researchers have examined farmers' markets as specialized retail environments. Berry (1967) studied the specialized function of commercial areas within a metropolitan area, which provided an alternative commercial experience to the planned and unplanned centres within these urban areas. In this case, Berry was explaining the phenomena of the grouping of similar retail activities together in a type of district.

Jones and Simmons (1993) in *Location, Location, Location* examined the concept put forth by Berry in terms of its growth and variety. Specialized retail environments were growing in numbers and diversity in the Canadian retail environment. The authors offered suggestions for this growth citing changing demographics and lifestyles of the past two decades that are more leisure and recreation oriented. In addition, the ethnic communities that formed in the 1950s have greater wealth and enjoy browsing and going on weekend shopping trips, both inside and outside metropolitan areas (Jones & Simmons, 1993, 222)

Specialized retail environments are divided into five classes according to Jones & Simmons (1993). The first class which most farmers' markets would fit into is the special product area. These areas are classified as either serving an area that is metropolitan-wide or a smaller neighbourhood area. The two farmers' markets in North Waterloo would be considered metropolitan-wide based on their wide trade area, while the downtown Kitchener Market has a smaller, localized trade area and would therefore be considered neighbourhood in its function. Other specialized retail environments included the fashion centres, factory outlet/off-price centre, historic/theme developments and ethic/lifestyle environments (Jones & Simmons, 1993, 223). It can be seen in these examples that specialized retail environments are prominent and growing in the retail environment.

2.3.1 Central Place Theory and Farmers' Markets

Central Place Theory is concerned with the theory of local trade, which in this case is farmers' markets. Local trade is seen as an important part of urban systems as it is an activity performed daily on a worldwide basis in various towns, cities and villages. Christaller's central place theory from the 1930s is built on assumptions describing the character or makeup of an imaginary world or model which may or may not be true in a real world situation.

Christaller's model assumes that people exhibited economically rational shopping behaviour. They act rationally in space and always maximize their shopping opportunities

As a result one could easily calculate and map where any consumer should travel for a particular level of good.

Certain aspects of central place theory are applicable to the study of farmers' markets. When people travel to a farmers' market, they not only pay for the goods at the market, but also the transportation costs involved in getting to the market. The fixed cost is the price of the goods while the variable cost involved is the distance travelled. In addition there is a certain distance point where consumers are not willing to support the travelling costs. This distance is equal on all sides and the maximum distance that customers are willing to travel is known as the range (Marshall, 1989, 145). For many stores that sell similar goods, such as grocery stores, the range is small as customers will travel to the closest store to buy these goods. However, farmers' markets are activities that are not found everywhere and do not possess equal ranges. Customers now are not as concerned about minimizing travel costs and will travel greater distances to farmers' markets.

There may be interpersonal differences not included in Christaller's model of consumption that determine why shoppers may no longer shop at the closest site or choose a particular store to minimize costs. In today's climate there are different lifestyles and life cycles existing that have an affect on a consumer's behaviour. These different role groups each may have particular spatial patterns for obtaining goods and may differ from traditional models of the patterns of movement, to obtain goods in the retail environment. To illustrate, an example of local trade can be examined as it pertains to Christaller's first assumption of the urban pattern taking shape on an isotropic plain. Here a farmer possesses identical tastes for goods, and disposable income is constant. If the store that the farmer shops at offers the same type of goods, the only difference between the stores keeping the above constant, would be the distance. Therefore, the farmer recognizing that it is more expensive to travel to a store ten kilometres away, will instead pick a similar store two kilometres away to minimize transportation costs.

Interpersonal differences exist in both consumer attitudes and consumer behaviour. Consumer shopping behaviour can be explained by how the consumer feels about a shopping experience, that leads to the person building a shopping strategy for the particular shopping activity. In this way the consumers' spatial pattern of shopping is an expression of shopping behaviour within the urban system that is within the normal activity pattern of the individual or household (Scriver, 1990, 5-6).

To relate this to the farmers' market example, certain individuals will travel longer distances to purchase meats, cheese, vegetables and fruits at the farmers' market, although the same type of goods are available closer to them at a local store. Perceptions enter this example as they affect an individual's attitudes. One individual may perceive a particular farmers' market as having a rural atmosphere and may consider this rural atmosphere a positive feature of shopping at the market. In addition a consumer may perceive that the goods (such as fruits and vegetables) may be fresher or more natural at a farmers' market than at a grocery store, though the truth may be that both goods, oranges for an example, came from the same truck but were distributed by different retailers. These attitudes in turn, may influence how someone feels about the market experience. These attitudes, perceptions and behaviours are all important in deciding individual markets as well, which may be reflected in the individual market category.

Shopping has become a way of life as we must eat, and to do so we must shop for food from either a restaurant, farmer, store or a market of some type. As a consuming society, we have an insatiable appetite for not only food, but for many consumer goods including designer clothing and high technology components. Different reasons for this appetite may be attributed to increased advertising through different mediums, greater relative wealth and more discretionary time. In addition, households today purchase more goods outside the home that used to be made within. An example of this would be that more people used to bake bread and cookies in the homes for their own household consumption, instead of relying on bakery or a grocery store for these baked goods.

As people today have become increasingly busy and mobile, less time is spent at the home as people move within the city or countryside with greater frequency. With greater mobility, the constraint of travelling to the closest store is no longer as important a criterion for destination choice as it used to be (Scriver, 1990, 8).

2.3.2 Theories In Shopping Strategy Literature

Researchers after Christaller realized that not all consumers share the approach of minimizing costs while shopping. Perceived cost of travel has been reduced in terms of relative cost of travel and time. Stone (1954) and Hoggart (1978) and others examined shopping strategies and behaviours of customers and found that there were other factors involved in the shopping process that determines a consumers' shopping behaviour or pattern. One approach that emphasizes space preferences of the individual was put forth by Harvey (1969), "each individual behaves according to his/her own satisfying criteria, which may include the fulfilment of deep-seated psychological needs as well as social and/or economic objectives" (Harvey, 1969, 53). Much research in the marketing geography field has examined the relationship of consumers and retail centres, including their spatial choice, behaviour, attitudes and perceptions of retail environments. More specifically consumers' behaviour and spatial choice of retail establishments has been described as. "the spatial acts of individual directly involved in obtaining and using economic goods and services, including the decision-making processes that precede and determine these acts" (Engel et al., 1968, 5).

The research by Stone (1954) examined the shopping strategies of housewives and their store choice based on their perceptions of the community. It was found that shopping was viewed as both a personal and social experience. Stone categorized his subjects into different classifications of shopper types that included economic, personalizing, ethical, and apathetic (Stone, 1954, 40). The first type refers to those individuals who are concerned about economic attributes of a shopping alternative, such as price, quality and variety of goods. Consumers in the second category are motivated to choose store(s) according to the personal attention and service provided to them. The third type of consumer includes individuals who shop at specific store(s) because of certain moral constraints. "They are willing to sacrifice lower price and a wider selection of goods because some stores have no heart and soul" (Stone, 1954, 41). The last type defines the shoppers who select store(s) in terms of convenient location. In his classifications, Stone has demonstrated how a consumer evaluates their shopping alternatives.

Tauber (1972) in addition to Stone's consumers' shopping motivations, looked at the social and personal aspects of the shopping trip. When examining the personal aspects, he found that shopping was not only an activity to acquire goods and services, but also an experience affected by personal attitudes. Six personal reasons or motives for shopping were listed by the author including: diversion, role playing, self-gratification, learning about new trends, physical activity and sensory stimulation. With the term diversion, Tauber explained, "shopping can offer an opportunity for diversion from the routine of daily life and thus represents a form of recreation" (Tauber, 1972, 47). With self-gratification, shopping becomes a utility for the buying process itself rather than the process of consuming. As farmers' markets are sometimes more than just a consuming process, the motives of physical activity and sensory stimulation play an important role. Many shoppers enjoy walking in the market environments besides browsing and "taking in" all of the surrounding noises, smells and activities. Farmers' markets do add colour, vibrancy and atmosphere, lacking in many created and seemingly artificial shopping environments such as shopping malls.

Tauber also examined the social motivations for shopping by suggesting five classifications including. social experiences outside the home, communication with others having a similar interest, peer group attraction, status and authority and pleasure of bargaining. Farmers' markets fit in particularly well in the social aspects of the shopping experience. The author states that farmers' markets "offer a time and place for social interaction" while "sales personnel are frequently sought to provide special information concerning the activity" (Tauber, 1972, 48). This activity may range from choosing a specific cut of beef to the proper yarn for knitting sweaters. Other people are interested in the pleasure of bargaining at the markets. As farmers' markets lend themselves to face-to-face interaction, haggling becomes a favoured activity for many who come for a different experience that is not possible at traditional shopping venues.

Hoggart (1978) built upon Stone's classification mentioned previously by including three additional categories of shopping strategies. These strategies included constrained, contented and recreational. Here Hoggart included the relationship of the consumer's strategy for shopping with the choice of stores, in addition to the relationship between the shopper and the community as Stone had done. The following Table illustrates Hoggart's classification of different shopper types.

Table 2.2 - Hoggarts' Classification of Shopper Types

Economic:	evaluates with respect to price, quality, and variety of merchandise
Personalizing:	importance of social relations with retail personnel
Ethical:	moral obligation to purchase from particular shop or shop type
Apathetic:	effort minimizers since little satisfaction gained from shopping
Constrained:	(by time or travel) preferred shops not patronized
Recreational:	enjoyed shopping
Contented:	satisfied, return to same shop

Source: Hoggart, 1978, 416

Two other categories of shoppers were described by Bellenger and Korgaonkar (1980) as recreational or economic. The authors described the recreational shopper as, "those who enjoy shopping as a leisure-time activity," while the "convenience or economic shoppers dislike shopping or are neutral toward it, and thus approach retail store selection from a time or money saving point of view" (Bellenger et al., 1980, 78). Another viewpoint about the term "economic shopper" was raised by Williams, Salma, and Rogers (1985) explaining that "economic shoppers are not necessarily interested in obtaining the best values, they simply dislike shopping" (Williams et al., 1985, 308). A more appropriate method of distinguishing the two types of shoppers would be describing them as either recreational or non-recreational. The recreational aspect emphasizes a spatial context where consumers that shop for recreational purposes will travel further than those non-recreational shoppers.

McCarthy (1980) analyzed the variables that influenced shopping behaviour. In his research, McCarthy identified five factors including generalized trip convenience, generalized trip comfort, generalized trip safety, generalized shopping area attraction, and generalized shopping area mobility. Table 2.3 summarizes these five factors with their underlying dimensions.

Table 2.3 - McCarthy's Five Factors Influencing Shopping Behaviour

Trip Convenience	trip and parking cost, trip time, start of trip, trip arrival time
Trip Comfort	clean, attractive, spacious passenger vehicle for shopping, protection from inclimate weather, comfortable ride, opportunity to shop elsewhere
Trip safety	safety from accidents during trip and from robbery or assault on the trip
Shopping Area Attraction	good variety of merchandise at shopping area, provide reliable repair service at area, ease of store to store movement, low price for merchandise and stores opening weekends and evenings
Shopping Area Mobility	uncrowded walkway and sidewalks, cleanliness, easy to park facilities

Source: McCarthy, 1980, 1270

A recent approach taken by Sack (1992) in his book, *Place, Modernity, and the Consumer's World* examines contemporary social life as it applies to the consumers' world of consumption. Sack starts by saying, "consumption is basic to living in the modern world" while "space can be a set of places, and place can be a location in space." These two terms of place and consumption are tied together in that consumption "is a place-creating and place-altering act" (Sack, 1992, 1-3). Sack also examines our places of consumption as taking an "intermediate position" between the public and space -- expressed in familiar landmarks as roads and buildings (Sack, 1992, 134). In his analysis of places, he describes stores and shopping malls as commodities. Some of this analysis can be used to explain consumption at farmers' markets. Sack stresses that the shopping environment must be attractive and their proximity must be desirable. Besides proximity, people select retail locations based on their reputation for price and quality. He states, "sales are enhanced by window-shopping, browsing, and exposure to an environment that titillates the sense, the landscapes not only contains commodities that can be consumed, the landscape itself is being consumed" (Sack, 1992, 135). The term farmers' market conjures up the image of a market in a rural area, with the country charm and atmosphere lacking in the constructed urban environment. The reputation and perception of the farmers' market are key in the consumer's mind as they may think about the "farm freshness" and "farm quality" of goods found at a farmers' market. People are indeed drawn to the country as a place or destination in addition to the farmers' market site. Many enjoy a leisurely drive in the country on the weekend, which translates into the browsing that occurs within a farmers' market. In this way the farmers' market is part of the environment just as the environment is part of the market.

2.3.3 Summary of Shopping Strategy Literature

To summarize, much of the literature that deals with shopping patterns and characteristics recognises that consumers share different views and attitudes towards shopping. Many researchers have attempted to classify consumers into different groups or categories based on them having similar shopping characteristics. The recreational shopper aspect came out of several studies and shows that shopping is not only a required activity out of necessity, but also one of enjoyment and pleasure. With many of the above shopping strategies, the authors have tried to categorize a person's behaviour or attitude into a particular characteristic that may or may not be true for all types of shopping activities. For example, one shopper may have different strategies towards shopping when it comes to grocery goods or clothing. One of these activities may be preferred over the other resulting in a different strategy for both. The farmers' market is an activity of "one stop shopping" where many goods of different types can be purchased in the same general area. As many farmers' markets offer both a grocery or food component and a handicraft component under one roof, a shoppers' perception or attitude towards shopping may be based on the whole farmers' market experience rather than on the singular food and craft components. Therefore, differences in consumers behaviour may be explained by differences in personalities, knowledge possessed about retail facilities, tastes, socioeconomic characteristics and expectations.

2.4 Farmers' Market Literature

2.4.1 Farmers' Markets in General

There have been many studies preformed that have involved both the supply and demand sides of the markets. A review of the literature on studies of farmers' markets has revealed two studies which were similar in content to this study and a third study with a more specific orientation. A study on farmers' markets was completed by the Lansing, Michigan Planning Board in 1969 that examined the present (1969) and future situation of the Lansing City Market. In addition to the Planning Board, Michigan State University also participated in the study to find and examine the following objectives:

> 1. "To provide and interpret data on consumer use of the Lansing Municipal Market, and the socioeconomic characteristics of the shoppers.
> 2. To learn consumer attitudes toward the market.
> 3. To obtain from the patrons suggestions for changes or improvement of the market."
>
> Source: Lansing, 1969, 21

The survey of the Lansing Market consisted of the following methods. One thousand mail-in surveys were distributed to the female shoppers. To confirm and compare the results received from the mail-in survey, a telephone survey was conducted from the general population.

The results from the study were broken down into several areas. The patrons at the market had above average household incomes. Average household size was calculated at 3 45 persons per household. Also, the 30 years old and under group were under-represented while the 45 to 59 years old category was over-represented. The study also reported that women were the main shoppers at the market, with more than six out of ten women shopping with another member of the household. Saturday was the most popular day for the three days a week market with 50% of the patrons shopping on that day. Tuesday ranked next at 41%, Thursday at 33% and a third indicated no special day. Most of the patrons (57%) shopped at the market during the morning while 11% shopped in the afternoon (Lansing, 1969, Appendix B).

Many patrons were regulars, with 87% shopping weekly during the summer months and half of this group shopping more than once a week. About 10% shopped every other week while three percent reported shopping once a month or less. In the fall and winter, the frequency of the visits dropped to 39% shopping once a week, 23% once every two weeks, and 23 percent once a month or less.

In terms of travel times to the market, eight out of 10 patrons travelled by car in less than twenty minutes.

Table 2.4 - Travel Mode and Time

Mode of Travel	Travel Time (minutes)	Percentages
walk	-	2%
car	< 10	23%
car	10-19	54%
car	20-29	16%
car	30 +	5%

Source: Lansing, 1969, Appendix B

In terms of desired products, fresh fruits and vegetables were the number one reason why shoppers came to the Lansing Market. The Lansing Market had a favourable image with the patrons, with many finding the freshness, quality, appearance and selection of products to be most important in that order. The following table lists the percentage of the shoppers that made a special effort to buy each product at the market.

Table 2.5 - Popularity of Products

99%	Fresh fruits and vegetables	41%	Cheese
62%	Poultry or eggs	35%	Potted flowers
51%	Cut flowers	23%	Christmas greens
47%	Canning fruits and vegetables	22%	Red meats/sausages
41%	Garden annuals	5%	Shrubs

Source: Lansing, 1969, Appendix B

A telephone survey was also administered to determine the shopping patterns of the area residents. From the survey it was found that two-thirds of the callers shopped at the market in the last year. Differences were found between the mail-in survey and the telephone survey. The telephone respondents shopped at the market less frequently, the female head of the household tended to shop alone more often, shopped for a shorter time, and lived closer to the market. Those respondents that did not shop at the market cited personal reasons, inconvenience and lack of transportation as principal reasons for not attending (Lansing, 1969, Appendix B).

To conclude, the report found:

> Lansing area shoppers have a very positive attitude toward the Municipal Market. They enjoy going to the market, it is a tradition in Lansing, and they find it educational to take children along. In general the shoppers feel they have a wide selection of products from which to choose, fresher products than otherwise available, and unpackaged items are available in any quantity desired. Also they feel prices are no higher, and in many cases lower, for equivalent quality in the supermarket. Some women make a special effort to take out of town visitors to the market because they consider it an enjoyable experience. Loyalty of shopper is extremely high. The fact that women are willing to over look parking problems is indicative of this loyalty feeling (Lansing, 1969, 22).

The urban service of a farmers' market was examined by Shakow (1981) showing the positive sides of a market in economic terms. In one instance the farmers' market reduces middleman costs which encourages local farmers and spinoff agricultural support activities, in addition to reducing food costs for patrons. In his research, Shakow examined the Pike Place Market District of Seattle, Washington where historical preservation and urban renewal were evident.

Two different surveys were administered, one to the vendors and one to market shoppers. The vendor survey indicated that the vendors were not "true" farmers as many were in urbanized areas of the country and had smaller farms than the larger farm operators. On the consumer side, a telephone survey was administered to 361 households, which indicated that the main market customers were from low income households. The study assumed that the low-income shoppers shopped at the market for the lower prices that would suggest economic shoppers. Overall, the study was not enriching to the literature as it left many questions open about the customers that patronized this market.

A final study was completed at the Hamilton Farmers' Market that examined a new parking structure at the market. In 1988, the Hamilton-Wentworth Planning and Development Department carried out a customer survey with the following objections in mind:

1. How customers travel to the market
2. Where car drivers park
3. Changes in market usage with a new parking facility
4. Perceived advantages and disadvantages of the new parking structure
5. Overall level of satisfaction with the parking situation (Hamilton, 1988, 1)

The survey for this study was carried out in three parts. count of market users, interview with market users and analysis of results. The count part of the study was carried out on four consecutive market days in one week. After the market count, a one page market interview was conducted using 750 patrons on a Saturday.

Several results were obtained from the survey of market users. It was found that approximately 46% of market customers travel to the market by automobile. After the new parking structure was built, it was determined that 10% of the patrons used the market less, with the majority, 86%, saying they used the market the same amount as before. Nearly half of the drivers to the market however found the new parking situation disadvantageous stating the increased cost and distance involved. Finally it was found that those patrons that drive to the market were more satisfied with the parking situation at 40% while only 22.5% of the non-drivers found the situation good or very good (Hamilton, 1988, Appendix B). Although this study had a high sample count, its aim was very specific (parking related) and the results obtained are not that significant in the understanding of farmers' markets in general.

2.4.2 Farmers' Markets in Kitchener-Waterloo

Farmers' markets in Kitchener-Waterloo have been described in a number of "coffeetable books" that have examined farmers' market in Ontario and Canada. One of these books called *To Market, To Market* by Biesenthal (1980) examined farmers' markets in Canada, including the Kitchener Farmers' Market. Here Biesenthal stated:

> "according to many market aficionados, the Kitchener Farmers' Market is the best market in North America and one of the best in the world. On almost every criterion for measuring the success of a market - and certainly on size, fortune and fame - Kitchener's is the best public market in Canada" (Biesenthal, 1980, 101).

Twelve years after this glowing report, the Kitchener Farmers' Market management found:

> "traffic from other parts of Ontario is not as heavy as it once was ... Torontonians and others within a 1-2 hour drive now see the two Waterloo Farmers' Markets as the place to go... a reflection of the marketing approach; diversity of vendors and products; plentiful activities; ample parking at the other Markets. One must also recognize that tourism traffic (domestic and out-of country) has dropped significantly over the past 4-5 years" (Chorney, 1992, 10).

Another picture book was written by Zander (1983), who examined the Waterloo Farmers' Market and the Kitchener-Waterloo Stockyards (St. Jacobs Farmers' Market) among others. In his description about the Waterloo Market the author stated:

> "almost all goods were homemade, home-grown or home-sewn. There were wooden toys and knitted sweaters, soaps and summer sausages, eggs, honey and cheeses from surrounding farms" (Zander, 1983, 55).

The Kitchener Farmers' Market was examined earlier by Rawls (1965) in an undergraduate thesis before the "new" Kitchener Market was built. Rawls made several observations about the patrons at the Kitchener Market at this time. It must be remembered that both the Waterloo Market and St. Jacobs Market also existed in different forms. The Waterloo Market was located near the centre of the City of Waterloo while the St. Jacobs Market existed as the stockyards on Victoria Street in Kitchener. Rawls said that many visitors from all over the United States "make a point of passing through Kitchener on their way up and back, merely to stock up on some of the European specialities of meats and cheeses" (Rawls, 1965, 11). In terms of the makeup of the patrons, Rawls observed many younger people coming to the market in addition to the loyal, older customer base. The majority of the patrons were also found to come between 9.00 and 10.00 in the morning (Rawls, 1965, 67).

The study of the Kitchener Market was updated eleven years later by another undergraduate student, Judith Hayes (1976). The timing was significant, for the Kitchener Farmers' Market had changed physically to become an indoor market as part of the new Market Square shopping mall in Downtown Kitchener. In her questionnaire Hayes surveyed 60 patrons including 18% first time shoppers and 53% Waterloo County natives. In addition Hayes discovered half of the patrons were fairly young in age, between 20 and 35 years old (Hayes, 1976, 64).

Table 2.6 - Hayes' Age Groups of the Patrons at Kitchener Market

Age Group (Years)	% of Sample
19 and under	14%
20 - 35	47%
36 - 45	17%
46 - 59	8%
60 +	15%

Source: Hayes, 1976, 64

The occupations of the individuals included 40% white collar occupations, 18% blue collar occupations, 13% students, 12% retired, 10% housewives and 7% unemployed (Hayes, 1976, 66). In terms of mode of transportation to the Kitchener Market, many respondents (78%) came by automobile while eight percent took the city bus and eight percent walked (Hayes, 1976, 71).

A final aspect of Hayes' study was the different patron characteristics based on the time of the day. The early morning patrons, which were characterised as arriving between 6.00 and 8.00 am, were generally over 45 years in age, spent less than an hour at the market, enjoyed the service, knew the vendors, were regular in their shopping patterns and wanted to avoid the rush of the midday patrons. The midmorning patrons that came between 9.00 and 11.00 am were generally younger (20 to 35 years old), usually brought friends along and stayed for longer periods of time. The final segment identified as arriving between 12.00 and 2.00 pm usually fell within one of two categories. The first category contained young patrons under 20 years old with the main purpose of socializing and eating. The second group in this time slot were older patrons that were there to get goods at reduced prices on items that were not sold by the end of the day (Hayes, 1976, 69-69).

A third study on a local farmers' market was conducted by Lucy Zundel (1982) as part of an undergraduate thesis. Zundel examined the Waterloo County Farmers' Market, looking at both the vendors and customers at the market. For the purpose of this study, the patron side will be reviewed. The survey was conducted in the middle of summer with a sample size of 182. More than half of the people that came to the market travelled as couples. When asked for reasons why the various patrons came to the market, the following generalized results were found. Many were drawn by novelty of the market experience, the high quality, healthy and fresh meats and produce and the cost effectiveness of larger bulk purchases (Zundel, 1982, 28-30).

Zundel also examined other characteristics of the patrons at the Waterloo County Farmers' Market. She found the majority of patrons shopped either once per week or once every two weeks. In addition, 68% of all patrons spent one-half to one hour at the market with regular shoppers spending less time. In terms of travelling times, those customers that travelled less than 20 minutes were considered local residents while those travelling longer than 45 minutes were considered visitors or tourists. The author observed the average customer at the market spent 24 dollars while the average length of patronage was 6.4 years (Zundel, 1982, 31-33).

Table 2.7 - Frequency of Visits to the Waterloo Market

Frequency	% of Patrons
Twice a week	5%
Once a week	36%
Once every 2 weeks	43%
Once a month	10%
Once every few months	6%

Source: Zundel, 1982, 29

Table 2.8 - Driving Time to the Waterloo Market

Driving Time	% of Patrons
< 10 minutes	13%
10 - 20 minutes	40%
20 - 30 minutes	9%
30 - 45 minutes	10%
> 45 minutes	28%

Source: Zundel, 1982, 32

Subjective questions were also asked of the market patrons. The majority of people (77%) heard about the market through word of mouth, with a second group (54%) aware of the market through articles or advertisements. In terms of reasons for going to the market, the majority of patrons rated the freshness and quality of food and the atmosphere and tradition of the market as key drawing points. In addition, the majority of products purchased at the market consisted of fruit, vegetables and dairy products (Zundel, 1982, 34-35) The following charts below lists these percentages.

Table 2.9 - Patrons' Reasons for Going to the Waterloo Market

Reason	% of Patrons
Fresher Food	28%
Atmosphere & Tradition	24%
Show Friends	16%
Browse	14%
Lower Prices	9%
Convenience	9%

Source: Zundel, 1982, 36

Table 2.10 - Products Bought at the Waterloo Market

Product	% of Patrons
Fruit	22%
Vegetables	22%
Dairy Products	16%
Meats, Poultry, Fish	13%
Baked Goods	11%
Specialty Foods	7%
Flowers, Plants	5%
Handicrafts, Souvenirs	4%

Source: Zundel, 1982, 36

Zundel (1982) also asked customers' perceptions about the Waterloo Market and the Kitchener Market. A third of the respondents perceived no differences between the two markets. Around 10% of the patrons preferred the Kitchener Market, mainly due to the parking problems and congestion at the Waterloo Market. The remaining 56% of the sample preferred the Waterloo Market mainly for the atmosphere, tradition and the Mennonites that were more likely to be found at the Waterloo Market. Many patrons disliked the "newness" of the Kitchener Market that lacked the sights and sounds of a true farmers' market, in addition to the parking garage structure of the whole area (Zundel, 1982, 38).

Overall, it was found that the shoppers at the Waterloo County Farmers' Market were regulars who came from the local area. Many came to the market for the fresher, high quality produce with a traditional country atmosphere. One customer summed it up by saying, "the atmosphere is what makes this market so special, its out in the country and just has a more farmer-like relaxed feeling" (Zundel ,1982, 44).

Another examination of the Kitchener Farmers' Market, was completed by the Coriolis Consulting Corporation in the fall of 1987. The study was designed to recommend ways that the Kitchener Market could be improved. In the summer of 1987, a telephone survey was conducted, that examined the 300 households in the Cities of Kitchener, Waterloo and Cambridge. The results of the findings were that 90% of the respondents knew of the Kitchener Market, while 70.7% knew of the Waterloo Market and 49 7% knew of the St. Jacobs Market. Close to a third never visit the Kitchener Market, with 23% visiting it at least once a month and 10% once a week. The popular purchases at the Kitchener Market included vegetables (82%), fruit (73%), meat (40%), dairy/cheese/eggs (24%), baked goods (15%) and crafts (10%). Close to two-thirds of the shoppers said they spent less than $25 in a shopping trip, with half spending between $10 and $25. Around 43% of the patrons at the Kitchener Market chose it because of its close proximity, 33% for variety and 15% for familiarity. Finally the study found that 88.5% of the residents usually drove to the market, with 6% walking and 5% taking the bus (Coriolis, 1987, 9-10). From the above results it can shown that the Kitchener Market is primarily a localized market attracting a regular clientele who shop for items such as fruits and vegetables that are perceived to fresher and of a higher quality.

A comprehensive study on farmers' markets in Waterloo was undertaken by Scriver (1990). In her study, she examined the Waterloo County Farmers' Market and the St. Jacobs Farmers' Market using a customer survey to examine patrons' perceptions, behaviours and attitudes towards farmers' market shopping. The results from Scriver's study will be explored further in Chapter 4 and compared with results from the current study.

2.4.3 Summary of Farmers' Markets Literature

The Lansing Municipal Market study was important in that it examined a number of characteristics of farmers' market patrons. Many market patrons were females who were shopping for their family. Most patrons were regulars from the general area, with nearly everyone travelling by car. In terms of popular goods, fruit and vegetables were purchased by nearly all customers, with poultry and eggs, flowers and garden goods following in descending importance. The Hamilton study did not contribute very much in terms of consumer behaviour except that half of the patrons that travelled to the market came by automobile while the other half travelled by other means. Hayes' (1976) survey of the Kitchener Farmers' Market was helpful in understanding the patrons of the newly constructed market in the mid 1970s. Many customers were young, had white collar occupations and spent under twenty dollars at the market. Many of the early morning patrons were older, with the younger patrons arriving at midday. In addition, the regulars came early for freshness, quality and selection or later for better prices. Zundel (1982) examined the St. Jacobs and Waterloo Farmers' Markets and found many people travelling as couples, drawn to the markets for the experience and perception of high quality, healthy goods The majority of patrons were regulars who came from the local surrounding area. Fresh food, atmosphere and tradition were important reasons for coming to the markets with fruit, vegetables, dairy products and meats comprising of the popular goods purchased.

2.5 Descriptions of the Local Farmers' Markets

Based on observations and the literature review, the following description of the three markets under study was made to establish a base for the research questions and procedures

2.5.1 Waterloo County Farmers' Market

The Waterloo County Farmers' Market is located directly across Weber Street from the St. Jacobs Farmers' Market in the Township of Woolwich, just north of the City of Waterloo. This market which is the older of the two, (the St. Jacobs Market first started out as a stockyards but later expanded to a full market) consists of vendors located inside and outside a large, cinder block market structure. In terms of size, the Waterloo Market had on average 350 vendors both inside and outside the structure (Chorney, 1993, 60). The Waterloo County Market is one of the best examples of a true farmers' market, as it sells locally produced goods and little mass-produced manufactured items. The outside market is home to fresh produce vendors who sell everything from apples to onions to flowers The inside market contains an assortment of vendors, with many of the meat, fish and dairy vendors located around the perimeter where coolers are located.

After examining this market on typical fall day in October, a number of observations were made. The structure of this market was the least pretentious of the three, with basic grey walls and girdered ceilings creating an inside reminiscent of a manufacturing firm. Wood was not used in this structure, as was with the St. Jacobs and Kitchener Markets, creating less of a country atmosphere inside. However the lively activity in and around the market proved that the market was quite popular with its patrons, many of whom appeared to be local. The Waterloo Market seemed to suit the purpose of providing a low cost environment to offer high quality and fresh products to a variety of customers, the majority of whom appear to be local and regulars.

2.5.2 The St. Jacobs Farmers' Market

The St. Jacobs Farmers' Market and Flea Market is located at the northern fringe of the built-up residential area, just outside the City of Waterloo on Weber Street. The origin of the St. Jacobs Market began in 1963 with the Stock Yard Farmers' Market on Victoria Street in Kitchener. In 1975, the Kitchener and Waterloo Stock Yards merged and moved to the present site on Weber Street. Just two years later, there were 100 market vendors at the site, operating only on the Thursday stock yard day. By the mid-1980s the market started operating on Saturdays. In 1987 the main structure, a two-story building constructed out of wood taking the appearance of a large barn, was built. Inside on the main level, food items are sold including fruit, vegetables, meats, cheeses and baked goods. The upper level is arranged in a mezzanine fashion with craft vendor stalls around the perimeter, allowing for an unobstructed view of the activity below. Two adjacent buildings house additional vendors selling a variety of soft and hard goods, crafts and homemade items. In addition to the inside vendors, a vibrant outside market exists with vendors selling fresh fruits and vegetables. In addition, the Mennonite tradition is evident with a clustering of Mennonite vendors who travel by horse and buggy selling products ranging from apple cider and maple syrup to vegetables and fruits from a "driving shed building". In terms of total space, 299 vendors are located on the inside sections of the market and 331 outside. In addition there are 3000 parking spots located on the market site (St. Jacobs Market, 1992, 1-2).

Again, observations were made at this market on a typical fall Saturday in October. The outside area south of the market was a sea of cars and tour buses, with the preferred mode of transportation being the automobile. A non-local vendor component was evident on the outside area with a number of vendors selling merchandise that would fall in the "flea" category of the market. Adjacent to this row of pots, T-shirts and plastic toys was the "true" farmer component of the market, with local vendors selling crisp apples and fall vegetables from the backs of their trucks. Once inside the main market structure a crowd of people was instantly noticed, each vying for a particular good or product from the different meat, fish, dairy and homemade product vendors. To emphasize the importance of the cash-based economy thriving at the market, a Toronto Dominion automated banking machine occupied a position next to a Mennonite selling summer sausage. The upstairs or mezzanine level contained more browsers than buyers, with most of the goods comprising of unique craft items. Two adjacent building existed off the main building, further increasing the size of the "flea" component of the market. Various consumer items were found in close proximity to each other, offering something for everyone (furniture, tools, sports cards, clothes, jewellery, insurance, etc.)

2.5.3 The Kitchener Farmers' Market

The Kitchener Farmers' Market is located in the parking garage structure at the rear of the Market Square, an indoor mall located in Downtown Kitchener. This permanent market portion of the structure has two floors, containing room for 430 stalls, where vendors sell various types of goods (Biesenthal, 1980, 108). The lower level of this complex contains vendors selling primarily meats, breads, homemade foods and dairy products. Adjacent to the lower level in the parking garage (this section is closed to parking on market days) are vendors selling fresh fruits, vegetables and flowers, generally from the backs of their trucks. The parking garage space has room for 130 stalls (Biesenthal, 1980, 108). The upper level of the Kitchener Market contains the remaining vendors selling primarily crafts and homemade goods.

After visiting the market on a typical Saturday in October, a number of observations were made The upper level accessed from the street or the mall, had many people milling about; many of whom were middle aged couples. The structure inside was not particularly rural, with much of the cement edifice covered with wooden lattices to shield the harshness of the florescent lighting The upper level seemed to be bustling with social interaction, with many people conversing with each other and their favourite vendors.

The lower level contained even more activity with people buying more everyday food items. The smells on this level were increasing noticeable with the aroma of fresh pies, breads and summer sausage wafting in the air. A steady flow of people were also coming and going through an entrance that linked the market to the parking garage, housing the fruit, vegetable and flower vendors. The white painted wall in this section lacked the ambiance of an outdoor farmers market but provides shelter and warmth during inclimate weather.

2.6 Questions From the Literature

Therefore based on the insights and findings in the literature and also the background of the author, certain questions can be posed to build upon the existing literature and fill any gaps that are present. The farmers' markets in Kitchener-Waterloo have not been studied collectively, although individual markets have been the subject of study. In the past, one or two of the markets have been studied in depth, but a comparison of the different market types and customers has not been fully examined.

Farmers' markets have been categorized into categories based on supply side conditions of the market, including the types of vendors, the location of the market, and the physical market structure. Neuwirth (1990) summarized markets into three supply side categories including the farmers' market, the public market and the festival marketplace. In an effort to see how these supply categories compare with the demand side or customer base of markets, a customer questionnaire was administered to customers at three farmers markets in Kitchener-Waterloo. It was expected that a congruent link could be made with the supply and demand side categories. It was also anticipated that the supply side affects the demand side reflected in the customers' attraction to the respective markets. The three markets in

Kitchener-Waterloo are all different in their function and in the type of customers they attract. The following chart explains the different categories of the supply and demand sides expected to be found based direct observations and on the results of a customer questionnaire examined in Chapter 3.

Table 2.11 - Hypothesized Characteristics of the Farmers' Markets in Kitchener-Waterloo

Market	Supply Side Category	Demand Side Category
Waterloo	Farmers' market	Contemporary/functional urban-fringe market
St. Jacobs	Festival marketplace	Day-trip/recreational periphery market
Kitchener	Public market	Regular/local downtown market

Sources: Neuwirth (1990), the Author

2.7 Hypotheses

Based on observations at all three farmers' markets in the Kitchener-Waterloo area, each market is considered to be distinct and different in a number of ways. Three different categories, both supply and demand side are expected as mentioned above. From the analysis, three different market functions are expected to be found, each unique in a special way. It is expected that the patrons of the Kitchener Market will be more localized in their place of residence, and shop there on a regular basis. In addition, the Waterloo Market is expected to draw people locally, including the surrounding rural areas, who enjoy the products found at a "real" farmers' market in addition to the rural atmosphere. Finally the St. Jacobs market is expected to attract more tourists who are not overly concerned about the true characteristics of a farmers' market, but enjoy the variety of the different goods, services and atmosphere offered at a market. It is expected that the perceptions, behaviours and attitudes of the local and tourist patrons will be different. Many tourist shoppers, it is believed, enjoy the markets for unique goods, atmosphere and novelty while the regular local shopper would be more concerned in getting high quality, fresh goods that are a substitute for many goods found at grocery stores.

The following chapter (Chapter 3) will discuss the data collected from a questionnaire administered at all three markets to examine these questions and hypotheses

Chapter 3

Research Procedure

The research procedure in this chapter is designed to address the queries from the hypotheses and literature that were outlined in the previous chapter.

3.1 Research Design

A standard survey was administered to a sample of customers at all three farmers' markets. The survey was standardized for all three markets in an effort to gain consistency in the answers obtained.

3.1.1 Market Day

All three of the farmers' markets in Kitchener-Waterloo have different days and hours of operation. The Kitchener Farmers' Market operates on Saturdays throughout the year from 6.00 am to 2.00 pm and on Thursdays from 8.00 am to 3.00 pm from May to October. The St. Jacobs Farmers' Market is also open every Saturday throughout the year from 7.00 am to 3.00 pm, Tuesdays from 8.00 to 3.00 pm during the summer months and Thursdays from 7.00 am to 4.00 pm during the months between May and October. The Ontario Livestock Exchange, which is at the same site as the St. Jacobs Market operates on Thursdays and is one of Canada's leading livestock markets. The Exchange offers an unique experience to market goers. For the local farmers, the St. Jacobs Market serves as the focal point for their livelihood with the sale of cattle and livestock at the Exchange, while the market provides them with an opportunity to buy needed goods as well as sell other farm products, including food, tools and equipment. For the outsiders and city customers, the Exchange within the market offers an additional rural experience to the farmers' market, by allowing them to witness the bustle, sights and sounds of a livestock auction. The Waterloo County Farmers' Market also has a Saturday market day throughout the year between 6.00 am and 2.00 pm and an additional Wednesday market between June and October from 8.00 am to 2.00 pm. Between all three markets during the peak summer months, the days of operation extend over most of the week: Tuesday, Wednesday, Thursday and Saturday. Sunday markets have not materialized in this region, perhaps due to the fact that Sunday is observed as a religious holiday for some of the vendors (Mennonites). As the Saturday market was a common denominator of all three markets, this day was chosen for analysis and comparison.

3.1.2 Sample Size

The sample size for the market questionnaire was based on a previous market study completed by Scriver (1990). In this study Scriver administered a simultaneous study at the St. Jacobs Farmers' Market and Waterloo County Farmers' Market where the sample was, "as large as possible given the time and resources available" (Scriver, 1990, 70). After her questionnaire was completed, she reported that she was able to obtain 235 surveys from the St. Jacobs Farmers' Market and 267 surveys at the Waterloo County Farmers' Market. The same approach was taken with this study in an effort to maintain a similar sample size at each of the three markets. Based on this criteria, a minimum of two-hundred samples per market was deemed satisfactory for an adequate sample of the customer population at each market.

In the end, a sample size of 211 was obtained at the Waterloo Market, 216 at the St. Jacobs Market, and 200 at the Kitchener Market.

3.1.3 Sampling Instrument

The method of obtaining information was through personal interviews conducted at the particular market using a standard questionnaire. Each of the two-paged questionnaires took approximately five minutes to administer. The questionnaire's format consisted of a single letter sized page with questions printed on both sides. This was the chosen format as it was easy to handle for the interviewers and contained 24 quick questions that would not overwhelm customers or discourage them from completing the survey. As each of the markets were crowded with people carrying their purchases with them, it was decided that a short, concise questionnaire would be more valuable than a longer comprehensive one that would require more time and effort to administer. The research assistant would read the questions and record the answers.

The questionnaire (Appendix A) was divided into a number of areas to obtain a detailed picture of the customers being sampled. The first section examined a number of questions that dealt with their journey to the market. These questions were important in assessing travel and shopping patterns of the market patrons. After the journey to the market, questions were posed that examined the customers' attitudes once inside the market, both qualitative and quantitative. This information was important in determining characteristics that were important in the farmers' market experience. A final section of questions was included that examined the demographics of the customers in order to determine the status of the individual in terms of their sex, age, education, and employment.

The design of the questionnaire went through a number of stages. The first questionnaire model originated from the market study completed by Scriver (1990). This questionnaire was studied including the results obtained from it, to determine its effectiveness as a sampling instrument for the farmers' market population. After this examination, a number of positive and negative points were addressed in an effort to improve upon the basic model. One of the biggest problems with the Scriver questionnaire was the size and format of it. This questionnaire spanned eight pages, which the researcher personally felt to be too long for the amount of information that was received from it. After careful consideration of the questions and responses from the original questionnaire that was administered by Scriver, a new survey was drafted, with the majority of questions being quantitative. This new questionnaire was modified and edited by peers, professors and professionals in the field of market research (Twin City Marketing) before being completed (Appendix A).

3.1.4 Research Assistants

Research assistants for this study were chosen from students in the fourth year Geography program and the Masters level in Geography at Wilfrid Laurier University. It was felt that these students would have an appreciation and understanding of survey research as they themselves were undertaking projects and theses that required surveys and field research The students were paid for their help and were not forced to participate. In this way, it was felt that the students would be more compelled to take the surveying seriously and provide accurate results of the customers being sampled. In the previous study by Scriver (1990), first year geography students volunteered their time for her project in an effort to gain experience in market research.

Fifteen students were chosen to help at the markets (including the researcher), with the intention of having five students positioned at each of the three markets. Before the students were introduced into their respective survey areas, a general meeting was called to introduce survey and questionnaire concepts with specific reference given to the current study. A few practice runs were completed with the students to anticipate any problems that might occur with the questionnaire in the field.

Transportation was arranged among the students, with a requirement that the survey begin at 7.30 am. Each of the students would take a five hour shift lasting from 7.30 am to 12.30 pm, in order to get a representative sample of the markets at all times in the morning. It was felt that if each group of five students were able to average 40 to 50 surveys each hour, the minimum requirement of 200 questionnaires would be met over the five hour period.

The students that participated with the market questionnaire were encouraged to look like students. It was felt that the market patrons would be more sympathetic to students completing a survey rather than professionals who were hired by the respective markets. In an effort to increase the profile of the surveyors, the students wore their student identification cards on their jackets and dressed in everyday student attire, which included clothing bearing the University's name.

In addition to their appearance, each surveyor received a letter of introduction from the supervising professor (Appendix B). This letter was made available to the respondents in case they required additional validation about the survey, prior to participating in the study.

3.1.5 Sampling Dates

The sampling of the three markets took place in the late fall of 1993. It was the original intention to sample all three markets simultaneously during one Saturday in November. However, circumstances arose (weather related) that required the survey procedure to extend over two simultaneous Saturdays in order to achieve the minimum sample size established in the previous section. The first sampling date (November 20) was chosen as it would resemble a typical market day in the late fall, without any strong holiday influences of Octoberfest or Christmas. A second sampling date (November 27) was added the next week out of necessity to reach the required minimum sampling size at the St. Jacobs Farmers' Market and Waterloo Country Farmers' Market.

3.1.6 Sampling Method - Positions

The purpose of the survey was to achieve a sample which was close as to random as possible and positions were determined with this in mind. In order to minimize duplication and maintain randomness, the students were placed close to entrances where customer flows would be the highest, and would not interfere greatly with the general pedestrian movement inside the market. With the inclement weather on both days, the surveys were conducted inside the markets. It was felt that all of the customers would have to pass through one of the entrances to gain access to the markets, each having an equal chance of being surveyed.

3.1.7 Method of Selection

In terms of selection of the market patrons, every third patron was selected and asked if they would be interested in completing the questionnaire. Every third person was chosen for a number of reasons. As many people travelled in pairs, every third person would eliminate the second person in the pair from being chosen to answer the questionnaire. As time was a constraint, every third person would be a small enough turnover to achieve a minimum sample size, while maintaining randomness.

3.1.8 People Excluded From Sample

During the sampling procedure, people were chosen to complete the questionnaire only once, or sampling without replacement. If by chance the same person was approached twice by another surveyor, most patrons mentioned they had already been sampled previously and therefore were not included a second time. It was unlikely that any patron participated twice as most people at the markets were busy with their shopping tasks and could not afford the time, or energy to repeat the questionnaire again. Vendors were excluded from the survey as their views about the market would differ from the views held by the market patrons. In addition people under eighteen years of age were excluded. It was felt that most people at the market under eighteen were accompanied by guardians or parents, whose responses would be more appropriate for the study.

3.2 Methods of Data Analysis

3.2.1 Primary Data

After the responses were entered into the computer using the statistics package SPSS for Windows, the data were analyzed for the users of all three markets collectively, in order to obtain average statistics, in addition to a comparison between the Waterloo, St. Jacobs and Kitchener Farmers' Markets. Frequency statistics were first used in order to get an overall objective feel for the data. This information was important in first determining the makeup of a typical market patron in Kitchener-Waterloo and also preliminary differences were found between markets. In an effort to ascertain differences among markets, crosstabulations were used and were grouped according to the individual markets. Crosstabulations were important to find relationships between different variables among the three markets. In order to measure the significance of the data, chi-square tests were administered on certain variables These tests were important measures for the validation of the data that appeared from the frequency tables and crosstabulations. Where appropriate, a 95% confidence interval was chosen and was considered the default confidence interval for SPSS.

3.2.2 Survey Dates

Before the survey began, it was desired by the researcher that all results could be obtained on one Saturday, using five market researchers at each market to achieve the minimum sample size. After the first Saturday (November 20, 1993), it was determined that the minimum sample size could not be achieved for the St. Jacobs and Waterloo Farmers' Market and a continuation of the survey would be required the following week After the two weeks were combined, it was determined that 61% or 129 questionnaires were administered the first week at the Waterloo Market and 73% or 158 questionnaires were administered at the St. Jacobs Market. The total number of questionnaires administered at the three markets over the two weeks were as follows. St. Jacobs 216, Waterloo 211 and Kitchener 200.

In order to determine if one date was significant over another, a chi-square test was run between the two dates. It was determined that the variables gathered between the two dates were considered on the most part to be from the same population at the 95% confidence interval. The one variable that was significant between the two dates was the length market patrons stayed at the two markets. The first Saturday had an average length of stay of 78 minutes while the second Saturday averaged 91 minutes. A reason for this significance can be explained by the weather conditions of the two Saturdays. The first Saturday (November 20) ushered in the beginning of winter into Waterloo Region with the first major snowfall of the season. The second Saturday (November 27) was mild and rainy in comparison and was not as inclimate as the first survey day. As the weather was better the second week it was thought that the market patrons would stay longer at the Waterloo and St. Jacobs markets, thus producing a significant result between the length of the stays. Overall it was determined that the sample was taken from similar populations over the two dates.

3.3 Findings

The next two chapters will present the results and conclusions obtained from the questionnaires administered at the three farmers' markets. Chapter 4 will present a comparative analysis of the three markets by examining crosstabulations, while Chapter 5 will offer conclusions from this study.

Chapter 4

Survey Findings

In this chapter the findings of the survey will be examined as a whole. An examination of the questionnaire results in summary form will be presented first for the totals of the three markets surveyed. These totals will be compared to the individual market values as the average figures for the three markets in order to spot unusually high or low differences between markets. After these initial results, a comparison of data between markets will be made to highlight differences between markets. Figures and tables will be used to illustrate the data. For a complete data analysis of the findings, Appendix C lists the results to each of the questions in tabular form. Chi-square analysis was preformed on each of the variables by the individual and total market values. At the bottom of each figure exists a total chi-square value for differences between all markets, including the significance level. A complete table of all the chi-square combinations is at the beginning of Chapter 5 in Table 5.1. A final step in each section will be to make comparisons with previous studies on local farmers' markets in Kitchener-Waterloo where possible, to examine any similar or dissimilar patterns, especially with the study by Scriver (1990).

4.1 Significance and Crosstabulation

Crosstabulations were performed for each of the variables in order to compare values between markets and also to determine significance between the two variables. The Pearson chi-square statistic or the observed significance level is the basis for deciding whether or not to reject the null hypothesis. The null hypothesis or the hypothesis of no difference is either ac^epted or rejected based on the observed significance level. If the observed significance level is small enough, or less than 0.05, the null hypothesis would be rejected as the difference between the variables would be large enough to be significant. In other words, if the difference between what we expect under the null hypothesis (no difference between variables) and what we observe in a sample is too large to be reasonably attributed to chance, we reject the null hypothesis and accept the hypothesis that the difference is significant. In each of the cases mentioned below, the market variable (the variable that distinguishes the markets) was compared with the individual variables or questions asked in the questionnaire.

4.2 Rejection of Questions

One question on the survey was rejected due to a number of reasons. The question asked "What type of impact on the market do you feel the new outlet mall being built adjacent t) the St. Jacobs Farmers' Market will have?" (see Appendix A). As many people were unaware of the new mall being built, they were unable to give an answer. Also many patrons at the Kitchener Farmers' Market were unaware of the St. Jacobs Market, and were confused by the question. After the answers were tabulated, there were no conclusive results with the outcome showing more uncertain and no responses than positive or negative answers to the question. As a result, the question was dropped from the analysis.

4.3 Refusal Rates

As mentioned previously, 15 students were used over two weeks to administer the questionnaire at the three farmers' markets in Kitchener-Waterloo. Of the surveyors, nine were males and six were females. In terms of refusal rates (those patrons refusing to answer the survey) the average rate for all of the markets was 29%. This average was lower when compared with the refusal rate of Scriver (1990) who had an average of 41%.

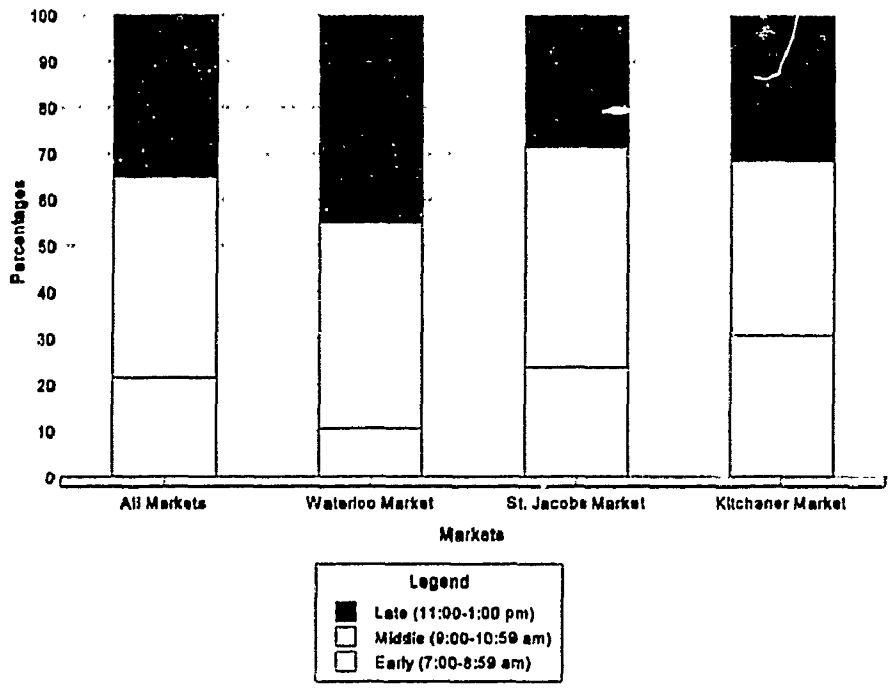
4.4 Statistical Analysis

4.4.1 Time of Survey

The survey times that the questionnaire was administered at the three markets was divided into early (7.00 to 8.59 am), middle (9.00 to 10.59 am), and late (11:00 am to 1.00 pm). Most of the surveys at the three markets were completed during the middle time period when the markets were the busiest. The Waterloo Market had more surveys completed later than the other two markets as there were fewer surveyors at the early time period due to the inclement weather that was experienced during the first Saturday. The Pearson chi-square value in this case was 31.6 and was considered very significant. Individually, there was a strong and significant association between the St. Jacobs and Waterloo and the Waterloo and Kitchener Markets. This would be attributed to a greater number of surveys administered at the Waterloo Market during a later time of the day than the other two markets.

An effort was made to see if the low survey count for the early morning period at the Waterloo Market had an affect on the results. A chi-square test was administered for each of the variables for the three markets keeping the early time period constant. These results were then compared with the overall chi-square statistics in order to see if a significant difference between the values existed. In most cases, the significance of the values during the early morning period was not as strong as the overall values. Variables such as the length of time, frequency of visits and the location of businesses visited before the market were not significant, while the combined time values were. Overall, the significant values for the early morning time period between markets were greater suggesting a similarity of the data

Figure 4.1 - Survey Times at the Farmers' Markets

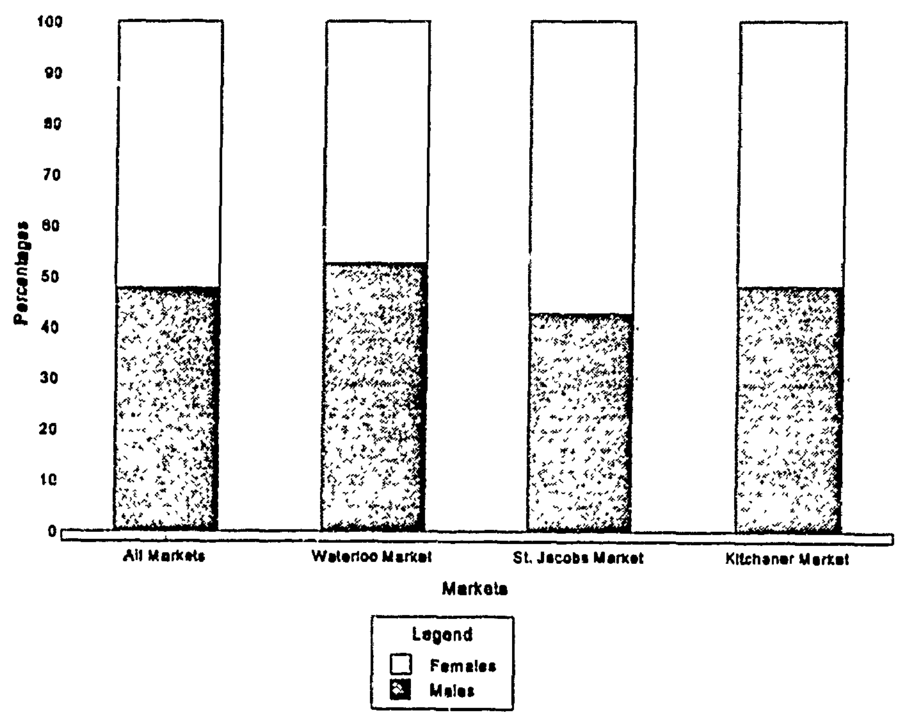


$x^2 = 31.6 \quad p = 0.00$

4.4.2 Demographics

Respondents at all of the markets were divided fairly evenly between males and females with 47.7% males and 52.3% females. These numbers were fairly consistent over the three markets with the exception of the Waterloo Market that had more male respondents The overall results were almost identical to those by Scriver (1990) who had 48 4% male respondents and 51.6% females, with the median age category being between 35 and 44 years. In terms of a total number of questionnaires administered, 235 patrons were surveyed at the St. Jacobs Market and 267 patrons at the Waterloo Market (Scriver, 1990, 96). Therefore between the two studies, similar sample and gender statistics existed, with proportionally more females at the St. Jacobs Farmers' Market. In this case the significance level of the chi-square value was high and therefore there were no significant differences of gender between the markets. There was however a weak significant association with the St Jacobs and Waterloo Markets which may be attributed to a greater percentage of male patrons overall at the Waterloo Market, as more males than females happened to be surveyed there.

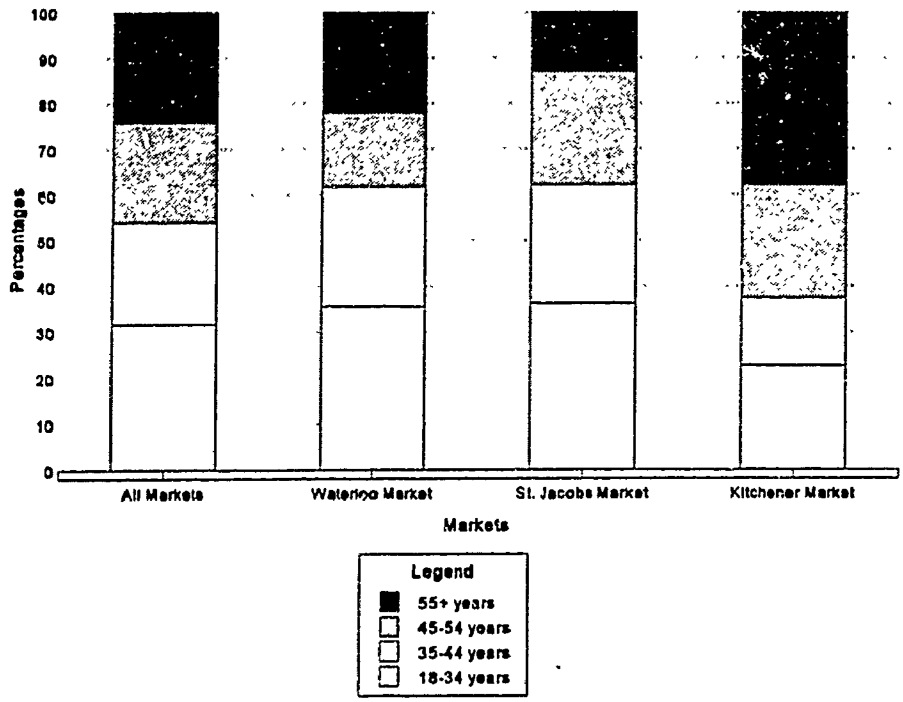
Figure 4.2 - Summary of Gender at the Farmers' Markets



$x^2 = 4.3 \quad p = 0.12$

The age of the patrons varied between the individual markets. The overall market results demonstrated that there was a fairly equal distribution between age categories, with nearly a third of the patrons between 18 and 34 years, 24% 55 years and over, 22% between 35 and 44 years and 22% between 45 and 54 years of age. The results from the individual markets indicated that many patrons at the Waterloo Market and St. Jacobs Market were young, with the majority of patrons in the two youngest age categories. The Kitchener market had the majority of respondents in the two oldest categories, with above average values in the 55 years and older category. Figure 4.3 shows that a proportionally higher age category are attracted to the Kitchener Market as the market is older and more established while the St. Jacobs Market has a greater proportion of younger people, having only been established as a farmers' market in the last decade. The chi-square values indicated a strong and significant association overall with age, especially with the age differences at the Kitchener Market.

Figure 4.3 - Summary of Age Categories at the Farmers' Markets

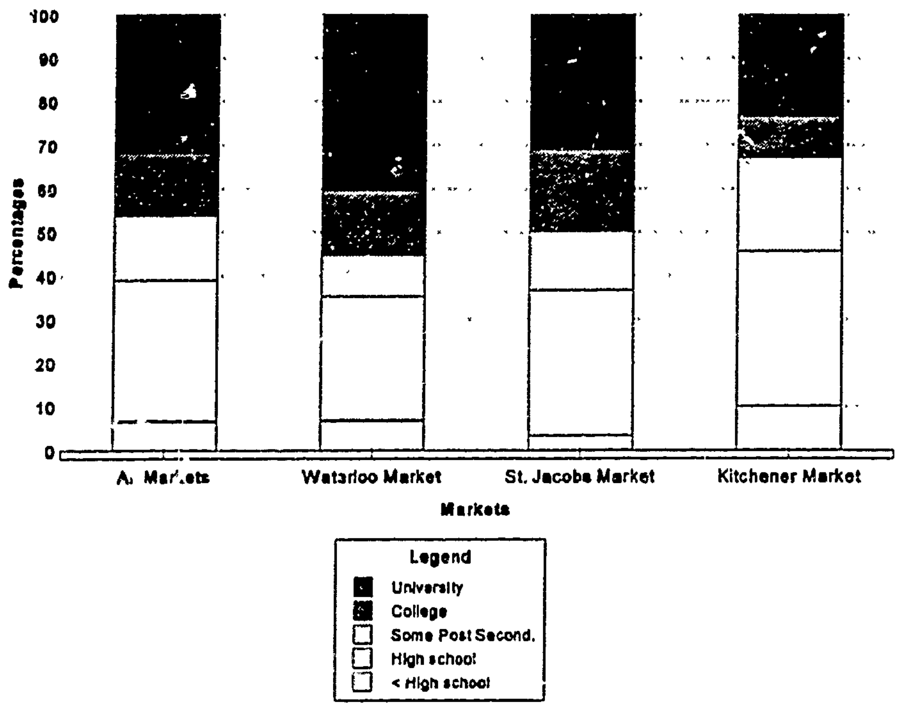


$x^2 = 46.1 \quad p = 0.00$

In Scriver's study, the age category with the greatest respondents was again the 18 to 34 years old with 33.7%, the 35 to 44 age category was second with 27.4%, the 45 to 54 category wit. 21.7% and the 55 and over category at 17.2%, which also suggests a fairly young crowd at the St. Jacobs and Waterloo Markets (Scriver, 1990, 97).

The education level of the patrons indicated that the market respondents were fairly well educated, with a third having a high school education and another third with a university education. About 15% of the respondents had some college or university in addition to another 15% who had a college education. Just under 7% had less than a high school education. Scriver (1990) found that just under a quarter of the patrons in her study had a university degree, 24% had a high school diploma, 19.5% had some college or university, 17% had less than high school and 11.8% had a college diploma (Scriver, 1990, 97). Comparatively, Scriver had a higher percentage of patrons with less than a high school education. Individually all of the markets had different proportions of educated people. The Waterloo Market had the highest number of highly educated people with 40.4% of respondents, 28.4% high school educations and 14.9% college educations. The St. Jacobs Market had similar education figures to those of the Kitchener Market with exactly a third of respondents with a high school education, 31% with university, 18.8% college and 13.6% with some college or university. The Kitchener Market likewise had 35.5% of its patrons with a high school education, 23.5% university, 21.5% with some college or university and 10 with less than high school. Of all the markets, the Kitchener Market had the highest number of patrons with less than a high school education with 10.0% while the St. Jacobs Market had the lowest at 3.3%. After examining the age characteristics and the education characteristics of the markets, it was determined that the Kitchener Market which had the highest number of older patrons, also had the highest number of patrons with a high school, or less education. Conversely, the St. Jacobs and Waterloo Markets which had highest number of young patrons in the 18 to 34 year old category, had a larger proportion of university educated patrons. In this case there was a significant and strong association between markets in regards to education levels, with a chi-square value of 34.2. The individual chi-squares were quite strong and significant with the age differences between the Kitchener and Waterloo and Kitchener and St. Jacobs Markets.

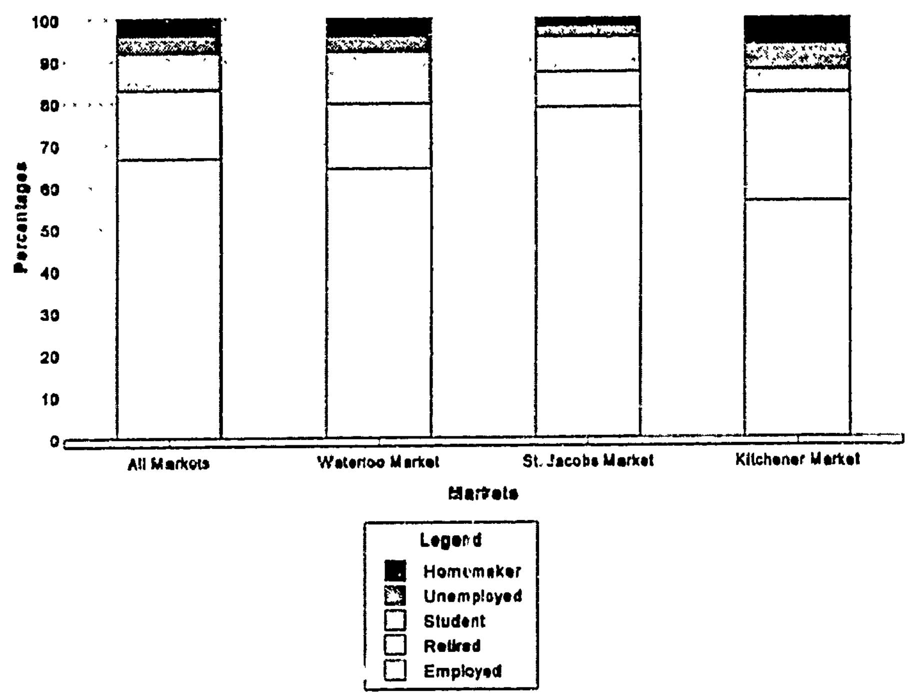
Figure 4.4 - Summary of Education Levels at the Farmers' Markets



$x^2 = 34.2 \quad p = 0.00$

In terms of employment, two-thirds of the patrons were employed at the three markets with 16.5% retired, 8.8% students, 4.2% unemployed and 4.2% homemakers. The Waterloo Market was the most like the average market values, with 64.0% employed, 15.6% retired, 12.3% students, 4.3% homemakers and 3.8% unemployed. The St. Jacobs Market had the highest proportion of employed patrons at 78.6%, with an equal number of retirees and students at 8.4%, 2.8% unemployed and only 1.9% homemakers. The Kitchener Market had the lowest proportion of employed people at 56.0% and students at 5.5%, while having the highest percentage of retired patrons at 26.0%, 6.5% homemakers and 6.0% unemployed. Again the Kitchener Market stands out with a large retired segment that corresponds to the older age group of patrons at that market. Employment levels were significant between markets with a chi-square value of 41.5. There were significant associations between all of the markets with the strongest association occurring between the St. Jacobs and Kitchener Markets. Figure 4.5 illustrates the differences in employment levels between these two markets.

Figure 4.5 - Summary of Employment Levels at the Farmers' Markets

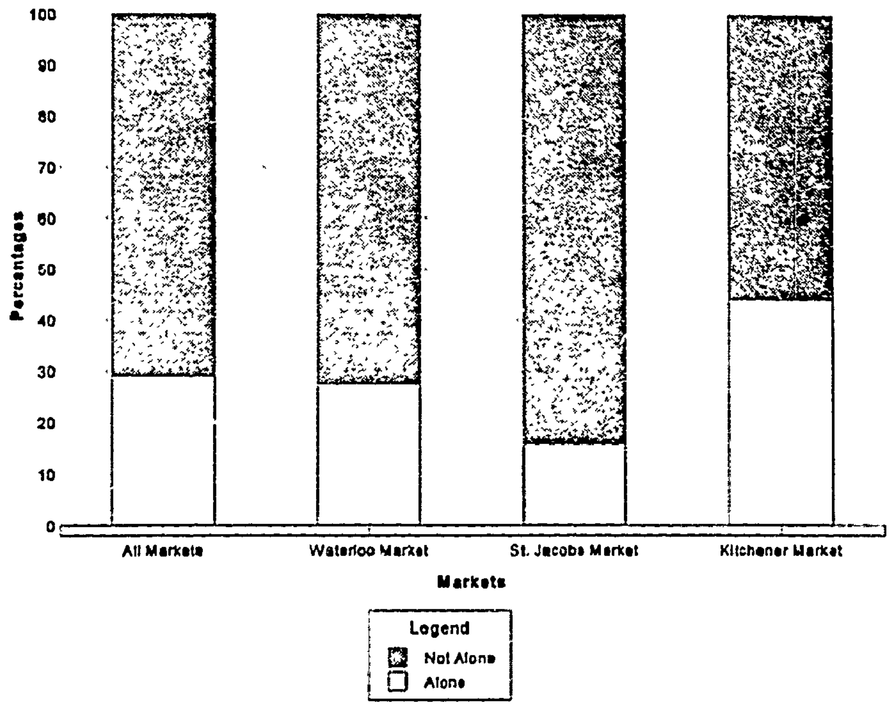


$x^2 = 41.5 \quad p = 0.00$

4.4.3 Consumer Behaviour Characteristics

Questions were posed at the markets regarding the types of respondents and the people that came with them. Overall it was found that 29.1% of respondents came to the markets alone while 70.9% came with other people. The Waterloo Market was similar to the average, with 27.5% arriving by themselves and 72.5% with others. The St. Jacobs Market was an activity that attracted groups of people rather than solitary participation with 15 8% coming alone and 84.2% coming with others. The Kitchener Market was on the opposite end of the average with 44.0% of its patrons coming alone to shop and 56.0% bringing others As it can be seen, the St. Jacobs Market had patrons that came together more in groups, while the Waterloo Market attracted just over a quarter of single patrons and the Kitchener Market attracted the greatest number of single patrons. These figures would indicate that shopping at the Kitchener Market is more of an individual activity while shopping at the periphery markets are more group oriented activities. There was significant and strong association between markets in this case, with a chi-square value of 40.4. The strongest individual association was between the St. Jacobs and Kitchener Markets, as there were many patrons that shopped alone at the Kitchener Market and very few that shopped alone at the St Jacobs Market.

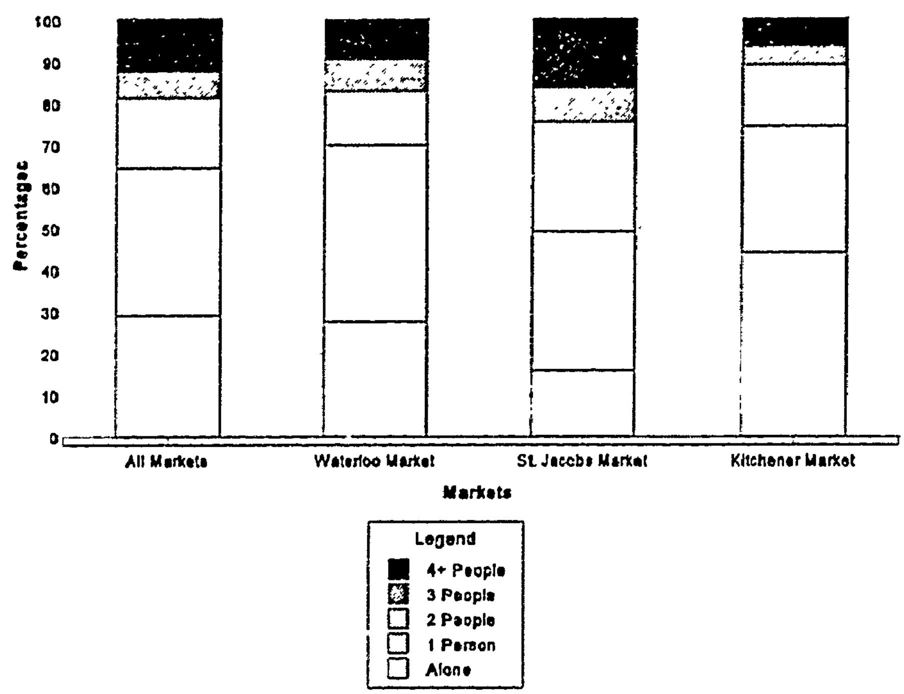
Figure 4.6 - Do Patrons Go Alone to the Farmers' Markets?



$x^2 = 40.4 \quad p = 0.00$

In terms of additional people that came to the markets, more than a third of the patrons came with an additional person, while 16.7% came with two people, 6.4% with three people and 12.7% with four or more people. The Waterloo Market had a greater percentage (42.3%) that came with one additional person, 13.0% with two people, 7.7% with three people and just under 10% that came with four or more. The St. Jacobs Market had the greatest percentage of people in the two people and over categories as compared to the other two markets Also of importance is the high percentage of patrons coming with four or more addition people to the market. This would suggest that the St. Jacobs Market is more a recreational/leisure trip enjoyed by more people than a singular person oriented shopping trip The Kitchener Market had just under a third of its patrons arrive with one additional person, 14.6% with two people, 4.5% with three people and 6.7% with four or more people. From these results more additional people were found at the St. Jacobs Market with over a third of the patrons coming with two or three additional people. The Waterloo and Kitchener Markets each had approximately 20.0% in this category. The number of additional patrons was very significant between markets with a chi-square value of 56.0. Individually each of the farmers' markets had strong and significant associations with the number of addition patrons.

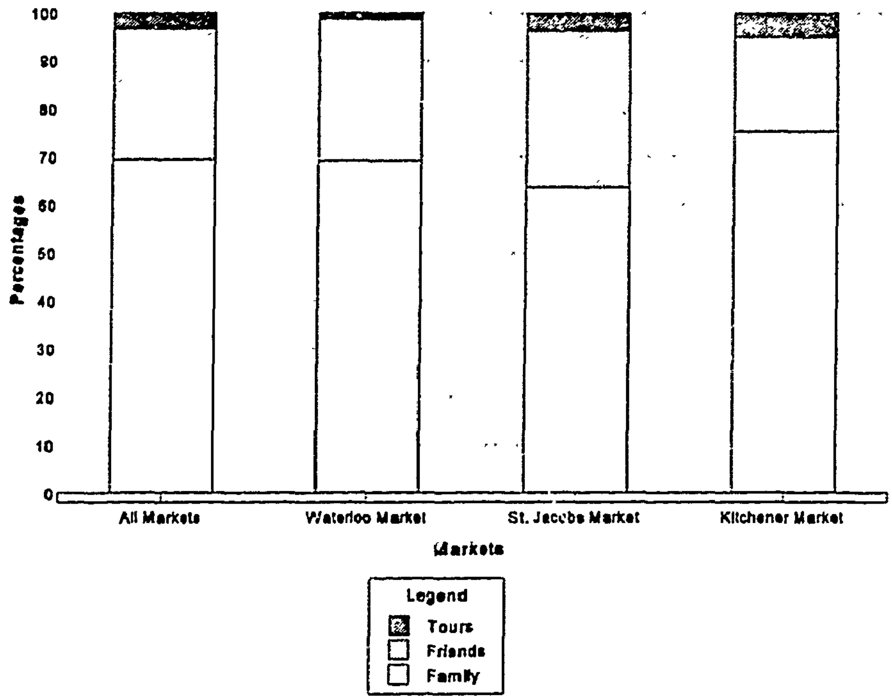
Figure 4.7 - Number of Additional Patrons Coming to the Farmers' Markets



$x^2 = 56.0 \quad p = 0.00$

It was also found from Figure 4.8 that over two-thirds of the additional people that came were family members. The remaining members were made up of friends (27.4%) and tour groups (3.4%). The Waterloo Market had similar results to the average figures with 69.0% family members, 29.7% friends and 1.3% tour groups. The St. Jacobs Market had the highest percentage of friends at 32.8%, with 63.5% family members and 3.7% tour groups. The Kitchener Market had the greatest percentage of family members at 75.2%, the least percentage of family members at 19.7% and the greatest percentage of tour groups (5.1%). From the figures, more family members come as additional people to the Kitchener Market, while friends as additional persons are of greater importance at both the Waterloo and St. Jacobs Markets. In this case, there were not a lot of differences in patron characteristics between markets, leading to a low chi-square value that was insignificant with an observed significance level of 0.12. Individually, no markets were significant or had high chi-square values.

Figure 4.8 - Characteristics of Patrons at the Farmers' Markets

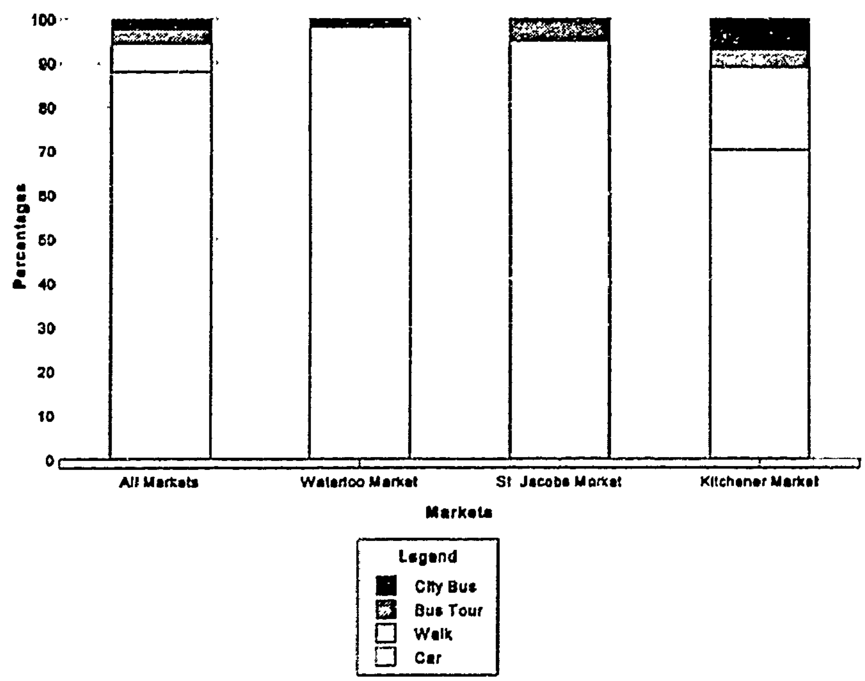


$x^2 = 7.4 \quad p = 0.12$

4.4.4 Mobility

On the most part, visiting farmers' markets in Kitchener-Waterloo require the use of a personal vehicle. It was observed that 88.0% of the respondents travelled to the market by personal vehicle, 6.2% walked, 3.5% came on a bus tour and 2.2% took the city bus. Individually, these numbers differed with each market, with location of the market being a factor. The Waterloo and St. Jacobs Markets, located on the periphery of Waterloo, each had over 95% of their patrons travelling by personal vehicle with the remaining percentage made up of bus tours. Scriver (1990) also found a high percentage (97.4%) of patrons travelling by a personal vehicle (Scriver, 1990, 99). The Kitchener Market on the other hand has only 70% of its patrons travelling by personal vehicle, with 19% walking, 7% taking the city bus and 4% arriving by bus tour. The location of the Kitchener Market in Downtown Kitchener makes it easier to access by other modes of transportation. Here, there is a strong and significant association between markets with a high chi-square value of 122.1. The strong association was evident individually with the Kitchener Market, as it had the greatest number of modes of transportation to the market.

Figure 4.9 - Choice of Transportation to the Farmers' Markets

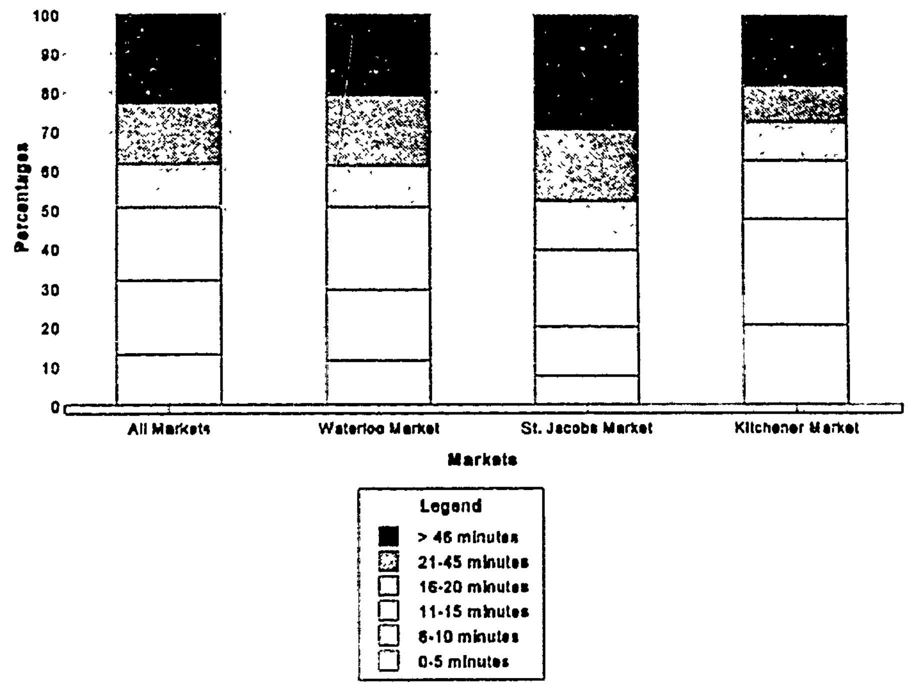


Chi-Square = 122.1 Sig = 0.00

The length of time spent travelling to the markets varied greatly. Nearly a quarter of the respondents, reported travelling times to the market of over 46 minutes which indicates an out of town population. The next largest group (19.0%) travelled between six and 10 minutes, with the third group (18.6%) travelling 11 to 15 minutes, 15.5% travelling between 21 and 45 minutes, 13.0% travelling under five minutes and the final group (11.0%) travelling between 16 and 20 minutes. In comparing the two studies, Scriver (1990) had a greater proportion of local people as compared to the current study.

For the individual markets, the St. Jacobs and Waterloo markets had very similar travel times. These results can be seen in Figure 4.10. The Waterloo Market had the greatest distribution of people between 6 and 15 minutes and also again in another grouping between 21 and greater than 46 minutes. These numbers suggest a grouping of people that lived close to the market and another group that lived farther away. The St. Jacobs Market had an above average percentage of people travelling greater than 46 minutes, suggesting a large proportion of customers coming from a long distance. The Kitchener Market had above average proportions of people travelling under five minutes and between six and ten minutes This would suggest that many of the Kitchener Market patrons travel only a short distance. The length of travel to the markets was very significant with a chi-square value of 49 3. Individually, the Kitchener Market had strong and significant values with the two markets while the Waterloo and St. Jacobs Markets were not significant. This would suggest different travelling times exist with the Kitchener Market, while more similar travelling times at the St Jacobs and Waterloo Markets.

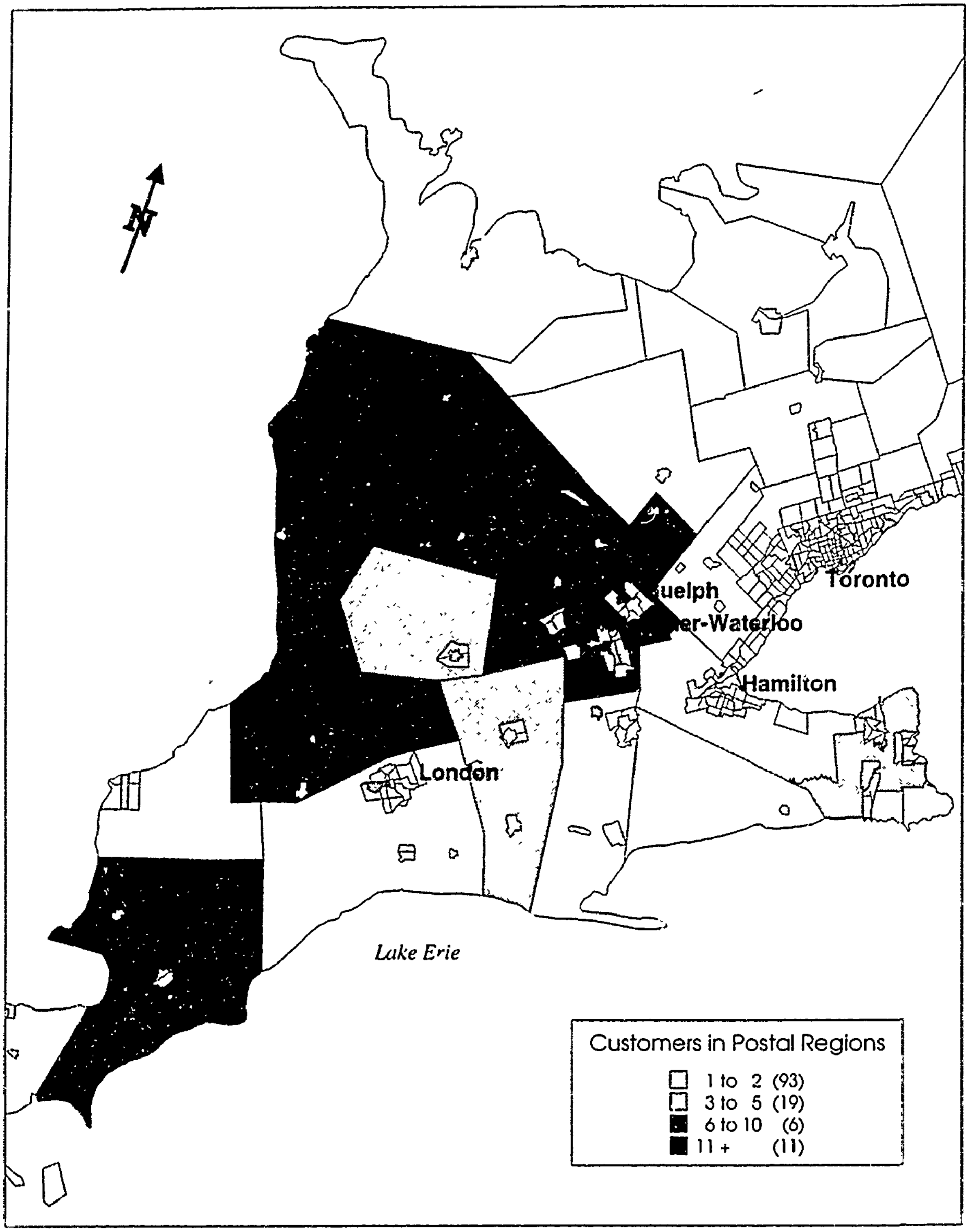
Figure 4.10 - Travelling Times to the Farmers' Markets



$x^2 = 49.3 \quad p = 0.00$

The home locations of patrons were important in determining the direction of travel and distance from the respective farmers' markets. See Appendix C for the breakdown of the top percentages of FSAs for all of the farmers' markets. Overall, Kitchener-Waterloo had the greatest number of market patrons as determined by the first three digits of the customers' home postal codes called forward sortation areas (FSAs). Over a quarter of the patrons at the markets came from FSAs centring around the King Street corridor. Nearly 6% of the patrons came from the large FSA of N0B surrounding the major areas of Kitchener, Waterloo, Cambridge and Guelph. The remaining significant FSAs were found in the surrounding urban areas surrounding the King Street corridor and can be seen with Figure 4.11.

Figure 4.11 - Customer Home Locations for All Three Farmers' Markets

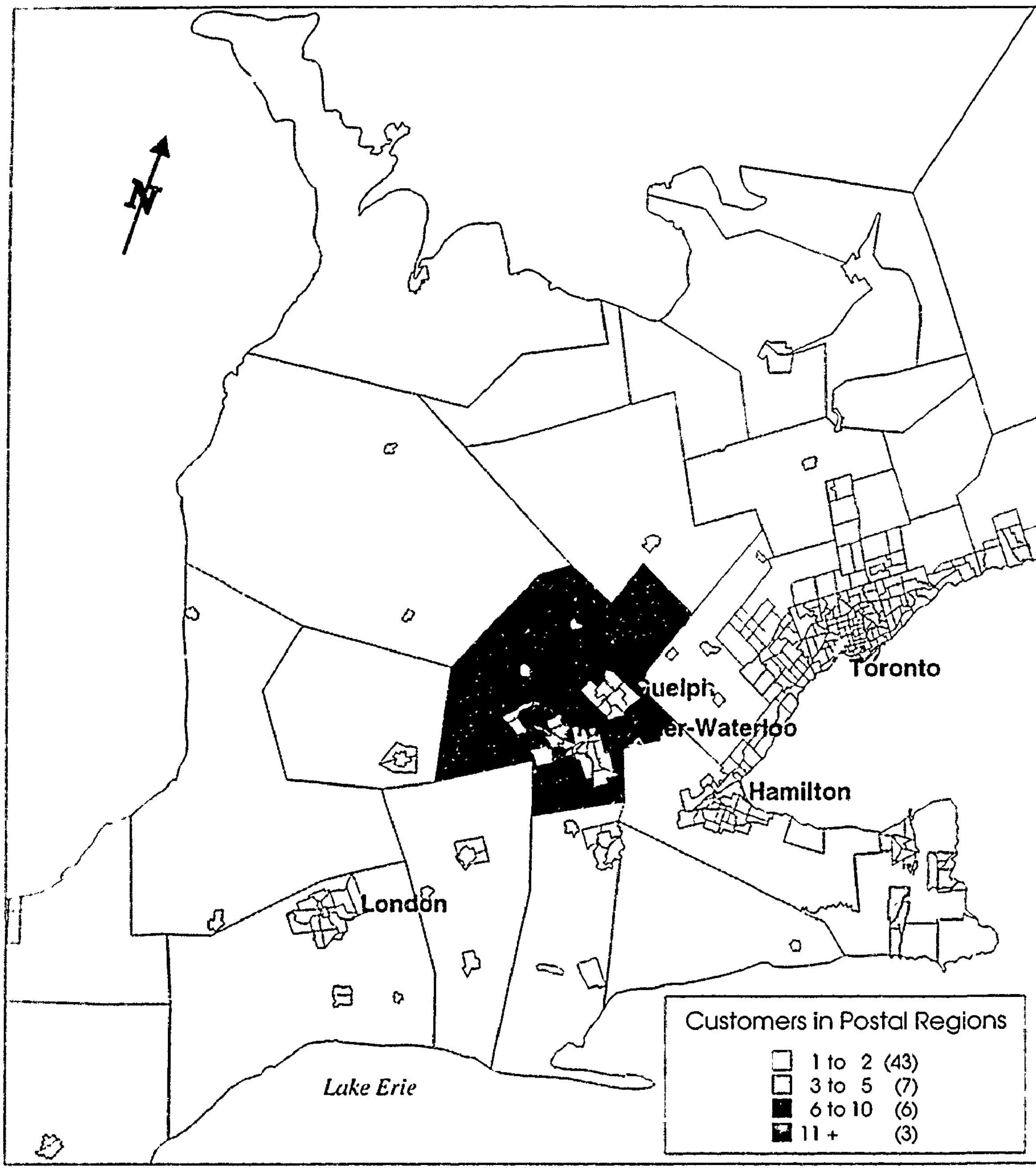


Note: Map Not to Scale

Source: Wells & Muncaster, 1993

Other outside FSAs appeared from west and north-west of the markets and also the Niagara Region. Scriver (1990) reported that a third of her respondents at the St. Jacobs and Waterloo Markets came from Waterloo, a quarter from Kitchener, 15% from elsewhere in the Region of Waterloo and a quarter outside the Region (Scriver, 1990, 100). The Waterloo Farmers' Market had a very localized patron base, with one in four patrons coming from central Waterloo. Another 9.5% came from the large rural FSA (N0B) and 12.4% travelled from central Kitchener. The Waterloo Market had the greatest percentage of patrons from the rural FSA (N0B) which included the small towns and villages of Shakespeare, Baden, Breslau, Wellesley, New Hamburg and St. Clements. The location of some of these places can be seen on Figure 1.1. Very few patrons came from outside the rural area surrounding Kitchener, Waterloo, Cambridge and Guelph. Those that came from outside this region came from areas west , south-east and north of the Waterloo Market and can be seen with Figure 4.12.

Figure 4.12 - Customer Home Locations for the Waterloo Farmers' Market



Note: Map Not to Scale

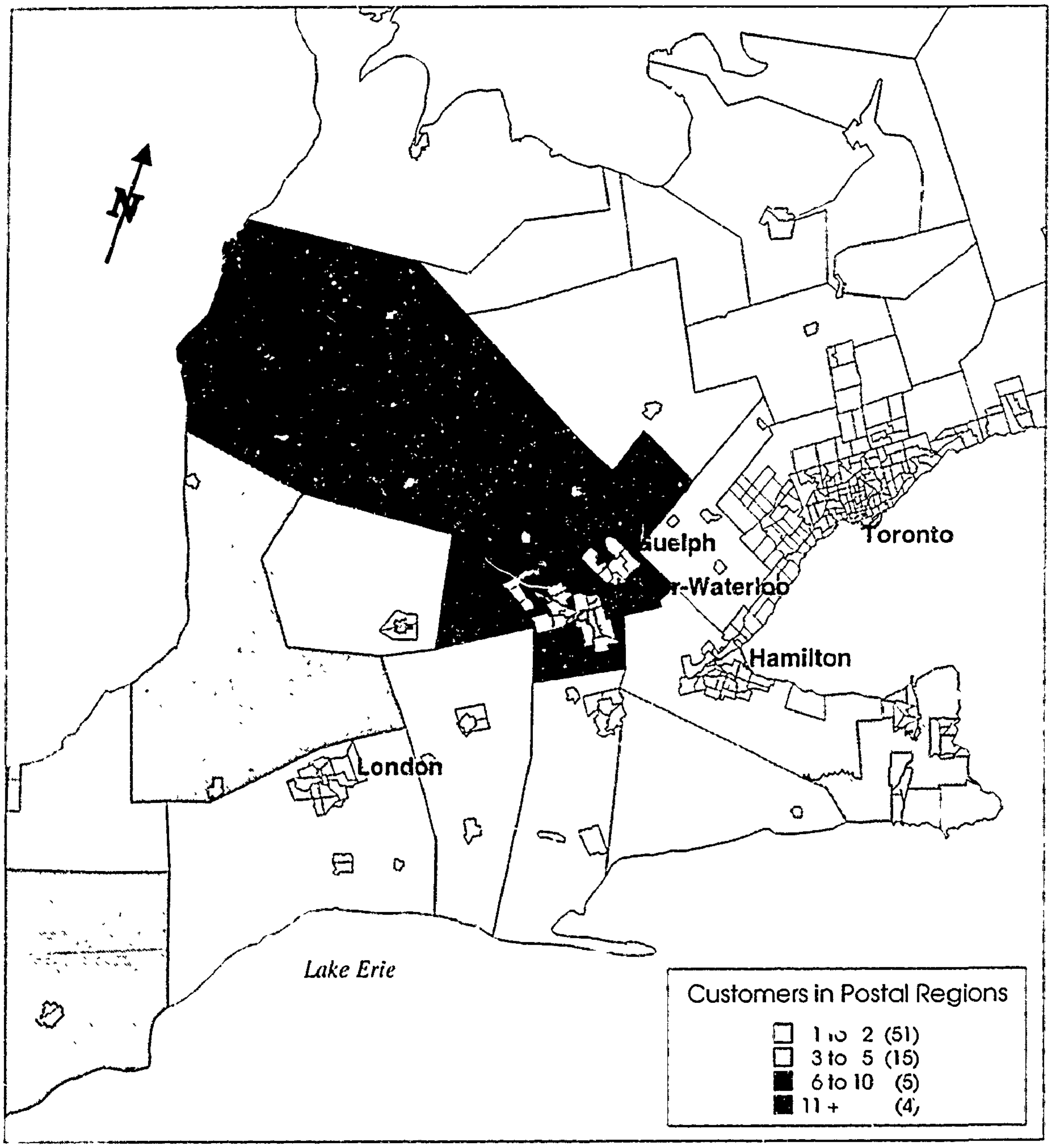
Source: Wells & Muncaster, 1993

The St. Jacobs Market had only half of its patrons from the large Waterloo FSA (N2L) as compared with the Waterloo Market. The large rural FSA (N0B) had only 5.2% as compared with 9.5% in the Waterloo example. The St. Jacobs Market however had fewer different small villages and towns in the N0B FSA as the Waterloo Market. The central Kitchener area held about 15% of the customer base. A fairly large area of customers (2 8%) was found in the area northwest of the St. Jacobs Market. In addition, two equal areas of customers (2.8%) were found in urban areas of Guelph and Kitchener. Over 60% of the customers remained split between FSAs all across southern Ontario including the Niagara Region, Orangeville, Sarnia, Chatham and Goderich as seen in Figure 4.13.

As far as dispersion of customers, the St. Jacobs Market has the most dispersed customer base of the three markets. The Kitchener market on the other hand, was very much concentrated in terms of its customer base. Nearly 44% of its customers came from Kitchener FSAs that surrounded the downtown market. The remaining customers of significant proportion came from Waterloo, representing 6.7% The remaining 50% of customers were spread over different areas of southwestern Ontario as seen with Figure 4 14

In addition to forward sortation areas, the market patrons were also divided by the cities or regions they came from. Overall, Kitchener had the highest percentage of customers for all of the markets at just over a third. Outside people that were not from the area or the region made the second largest group at 33.2% with Waterloo patrons at 19 3% and regional patrons at 12.0%. The Kitchener patrons stood out overall as the Kitchener Market had a high percentage of local patrons. The outside patrons also stood out as the St Jacobs Market had a very high percentage of patrons not from the area

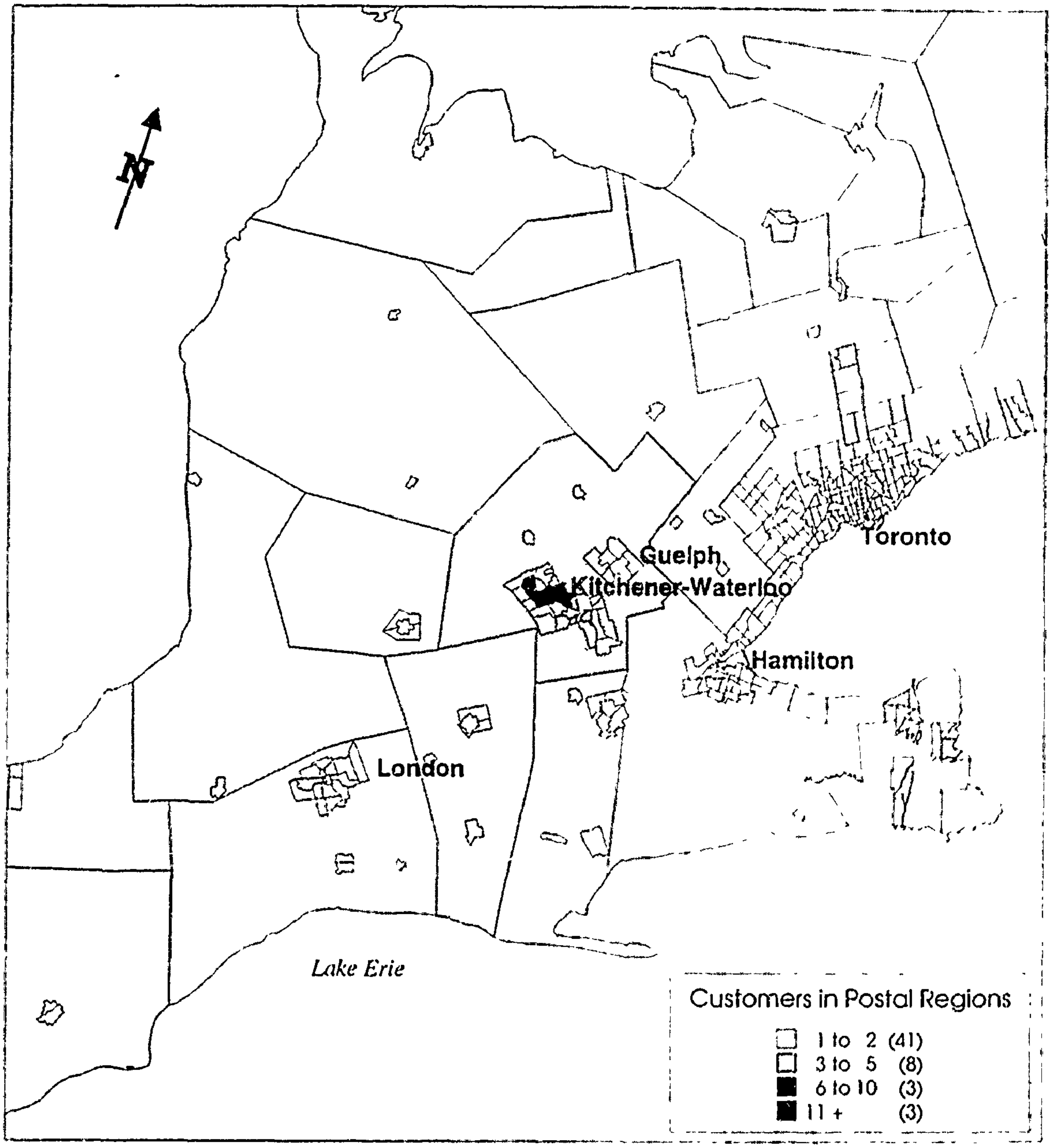
Figure 4.13 - Customer Home Locations for the St. Jacobs Farmers' Market



Note: Map Not to Scale

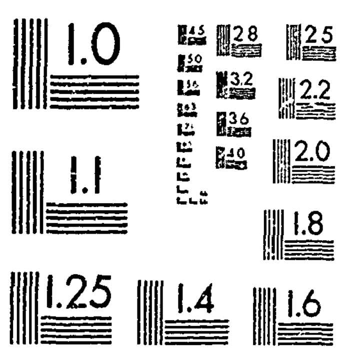
Source: Wells & Muncaster, 1993

Figure 4.14 - Customer Home Locations for the Kitchener Farmers' Market



Note: Map Not to Scale

Source: Wells & Muncaster, 1993

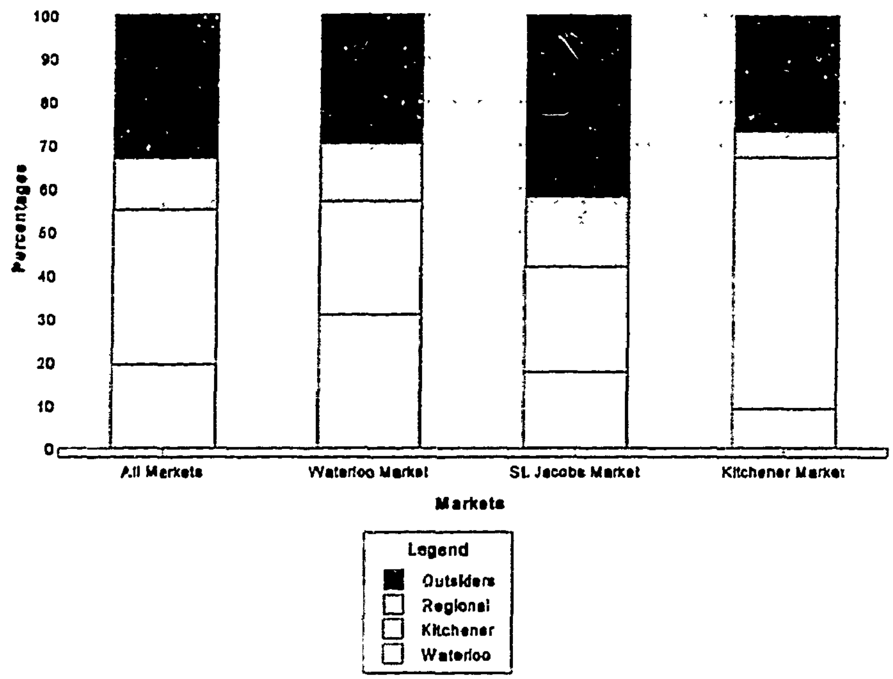

1.0
1.1
1.25
1.4
1.6
1.8
2.0
2.2
2.5
2.8
3.2
3.6
4.0

The Waterloo Market had an even mix of patrons from the various areas. Nearly identical percentages came from Waterloo and outside the area at around 30%. The next largest group was Kitchener at 26.1% and regional patrons at 13.3%. The Waterloo Market probably had a high number of outside patrons due to the high percentage of outside patrons from the St. Jacobs Market travelling across the road to the Waterloo Market.

The St. Jacobs Market had a very high percentage of patrons that were from outside the area. This would support the case that the market attracts many day-trip recreational patrons that come to the St. Jacobs Market more for an outing than a shopping trip Here 42.1% came from outside the area, 24.1% came from Kitchener, 17.6% from Waterloo and 16.2% from the region.

The Kitchener Market had a high percentage of patrons that came locally from Kitchener. It was determined that 58.0% came from Kitchener, 27.0% from outside the area, 9.0% from Waterloo and 6.0% from the surrounding region. As the Kitchener Market is located in the downtown area, it had an appeal to patrons that relied on other modes of transportation (other than the personal vehicle) and also for people that wanted the convenience of doing all of their shopping downtown. These percentage prove that the Kitchener Market is very much a localized market for patrons living primarily in Kitchener The areas where patrons travelled from were very significant between markets with a chi-square value of 85.2. Individually, all the markets had very significant and strong associations, with the highest chi-square value occurring between the Waterloo and Kitchener Markets. In this case the chi-square value was 55.2, with a significance level of 0.00

Figure 4.15 - Areas Where Customers Originate From at the Farmers' Markets

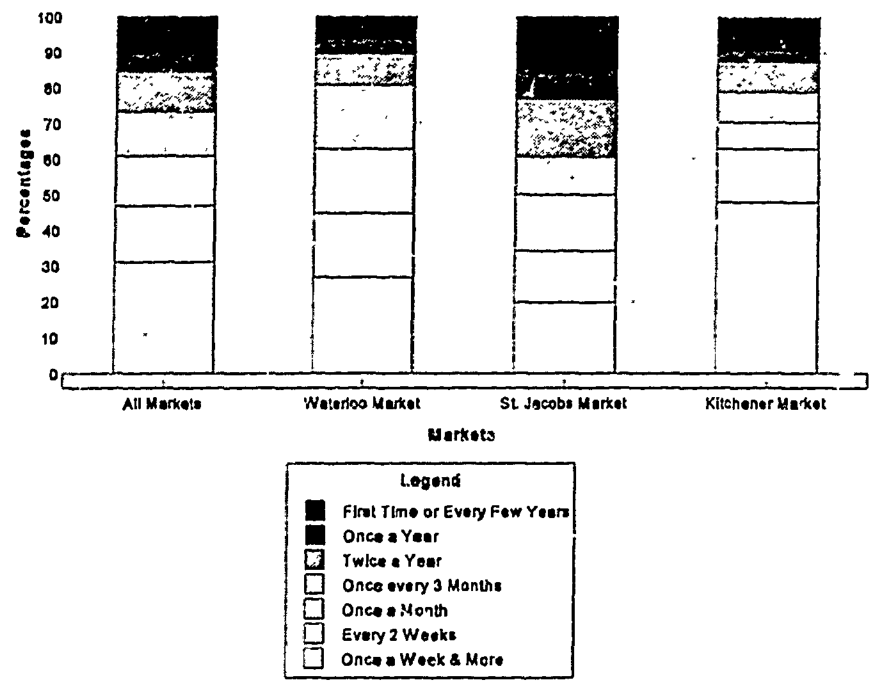


$x^2 = 85.2 \quad p = 0.00$

A question was asked of the patrons regarding their frequency of visits to the particular farmers' markets. Overall, many patrons (46.7%) shopped regularly at the markets with a frequency of at least every two weeks. Close to 14% shopped at least once a month with 12.5% every three months and 11.4% twice a year. The Waterloo Market had very similar figures to that of the total markets. Nearly 45% of the customers were considered regular, 26.5% shopped once a week, 18.0% every two weeks, 18.0% every month and 18.0% once every three months. In addition 9.0% of the customers came twice a year. First time visitors and patrons that came every few years accounted for 6.2% of the customers The St. Jacobs Market had fewer regular customers with only 34.0% of the respondents coming at least every two weeks. Only 19.6% of its customers came once a week and 16.3%

and 14.4% came every two weeks. A fairly large group (7.4%) came once a year with an even larger group (16.3%) coming twice a year. There was a very large percentage of patrons (15.8%) that came to the market for the first or every few years, suggesting a novelty experience for the patrons. The St. Jacobs Market had the highest percentage of irregular or new customers suggesting a tourist component at the market. The Kitchener Market had the greatest percentage (62.8%) of regular patrons, and also customers that came once a week or more (47.7%). These two figures show how the Kitchener Market is very much a regular shopping experience. In addition 15.1% of the patrons came every two weeks, 9.0% for the first time or every few years and 8.5% each for every three months and twice a year. As there were many differences between the markets, the chi-square value of 72.6 was very significant The highest chi-square value occurred individually between the St. Jacobs and Kitchener Markets as those two markets had the greatest differences in terms of the frequencies of visits.

Figure 4.16 - Frequency of Market Visits at the Farmers' Markets

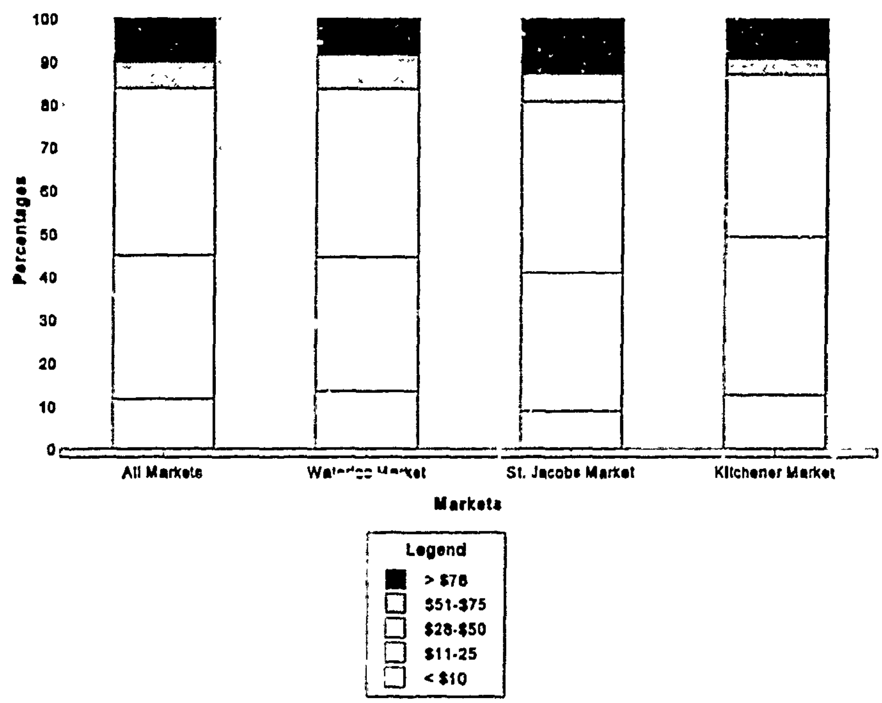


$x^2 = 72.6 \quad p = 0.00$

4.4.5 Value of Goods

Another variable examined was the amount of money spent at the markets for the survey day. Over two-thirds of all respondents spent between $11 and $50 at the markets, with 11.7% spending less than $10 and 10.1% spending more than $76 at the markets. At the Waterloo Market the proportions spent were similar to the total market values, with 70.0% of the customers spending between $11 and $50, 13.5% spending under $10 and 8 5% spending more than $76. The St. Jacobs Farmers' Market had 71.8% of its patrons spend between $11 and $50, with 12.7% spending more than $76 and 8.8% spending under $10. This trend continued for the Kitchener Farmers' Market with 74.3% of the patrons spending between $11 and $50, 12.6% under $10 and 9.3% spending more than $76. In most cases, the relative percentages spent in the different dollar categories were the same The chi-square in this case was low at 7.7 and insignificant (p=0.47), suggesting little differences in spending between markets. This held true individually as none of the markets had significant chi-square values.

Figure 4.17 - Value of Goods Purchased at the Farmers' Markets

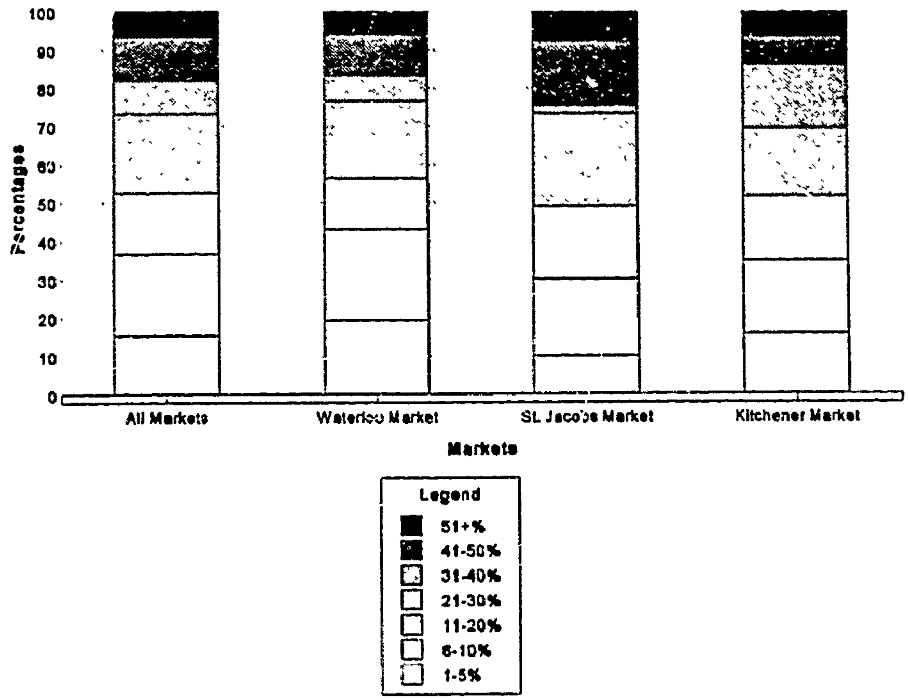


$x^2 = 7.7 \quad p = 0.47$

The influence of the markets on a customer's monthly food bill was examined to see the relative importance of food at the markets as opposed to food at a grocery store. Overall, the markets represented a variety of customer needs. It was found that 21 1% of the customers spent six to 10% of their monthly food budgets at farmers' markets, with 20 7% spending 21 to 30% of their budgets, 16.1% spending 11 to 20% and 15.4% spending

spending 21 to 30% of their budgets, 16.1% spending 11 to 20% and 15.4% spending between one and five percent. Scriver (1990) found that almost half (48%) of her patrons surveyed considered the market as a primary source of grocery items, agreeing with the statement. "I buy as much as I can at the market so I just have to pick up a few items at a grocery or convenience store" (Scriver, 1990, 131). Scriver found a greater dependence on the farmers' markets for grocery goods than with the current study. The Waterloo Market had 23.7% of its customers spending six to 10% of their monthly food budgets, 20.2% spending 21 to 30%, 19.3% spending one to five percent and 13.2% spending 11 to 20%. The St. Jacobs Market had nearly a quarter of its patrons spending 21 to 30% of their monthly food budget, 20% spending between six and 10%, 18.9% spending 11 to 20% and 16.7% spending between 41 and 50%. The Kitchener Market had similar member counts for each of its groupings. Here, 18.9% of the customers spent between six and 10% of their monthly food budgets at markets, 17.9% between 21 and 30% of their budgets, 16.8% spent 11 to 20% of their budgets and 16.8% spent between 31 and 40%. The chi-square value was small at 21.3 and the percentage spent between markets was weakly significant with a p value of 0.05. Individually, the St. Jacobs and Waterloo and Waterloo and Kitchener Markets had insignificant chi-square values. However, the St. Jacobs and Kitchener Markets had a strong significant chi-square value of 15.9, which would be reflected in the different monthly food budget percentages spent between those two markets.

Figure 4.18 - Percentage of Monthly Food Budget Spent at the Farmers' Markets



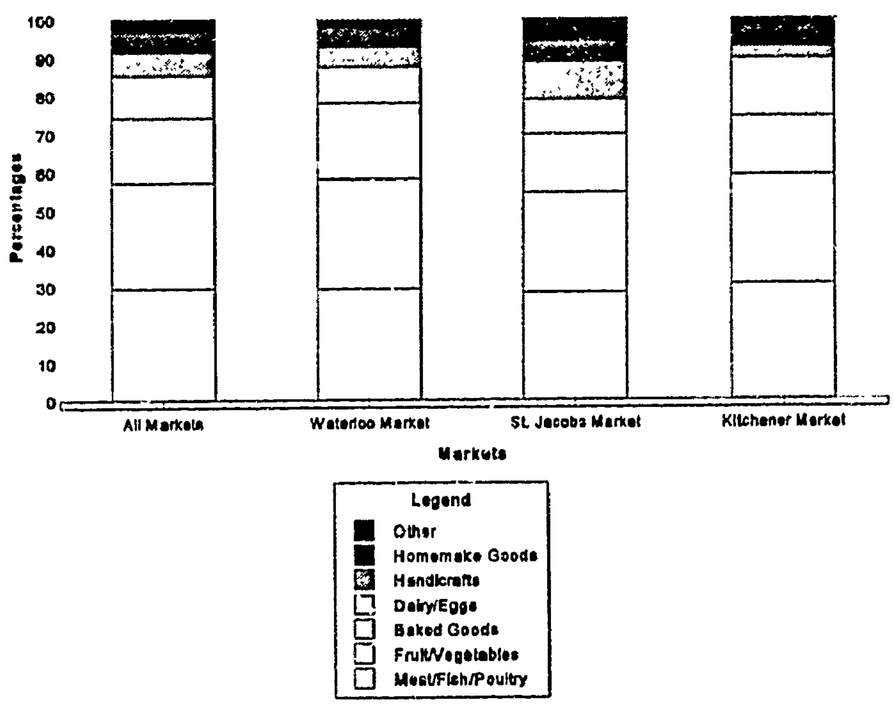
$x^2 = 21.3 \quad p = 0.05$

An effort was made to determine the relationship between the percentage of monthly income spent at the markets and the money spent during the day of the survey It was found that a majority of patrons who spent under $10 at the markets said they only spent one to five percent of their monthly food budgets at the markets. About a quarter of the patrons that spent between $11 and $25 during the day, spend six to 10% of the monthly food budgets at the markets, while 36.6% of these patrons spent 11% to 30% of their monthly food budgets. The next group of patrons that spent between $26 and $50 at the markets were split evenly over all the monthly percentage categories, with the highest percentage (22.8%) in the 21% to 30% category. Close to 42% of the patrons that spent between $51 and $75 at the markets for the day, spent between 21% and 30% of their monthly incomes there. The largest group of patrons (28.6%) that spent more than $75 at the markets, said they spent between six to ten percent of their monthly food budgets, with the next largest group (23 8%) spending between 41% and 50% of their monthly food budgets. Overall, the chi-square value was 64.3 with a significance value of 0.00 indicating significant differences between the variables. A general trend was evident, that found patrons who spent less at the market over a day, spent less of their monthly food budgets and vice-versa. There was however an exception to this trend with patrons who spent over $75. In this case two large groups existed; the infrequent tourist shoppers who spent a large amount money and also regular shoppers who bought a majority of their shopping goods at markets.

4.4.6 Goods Purchased

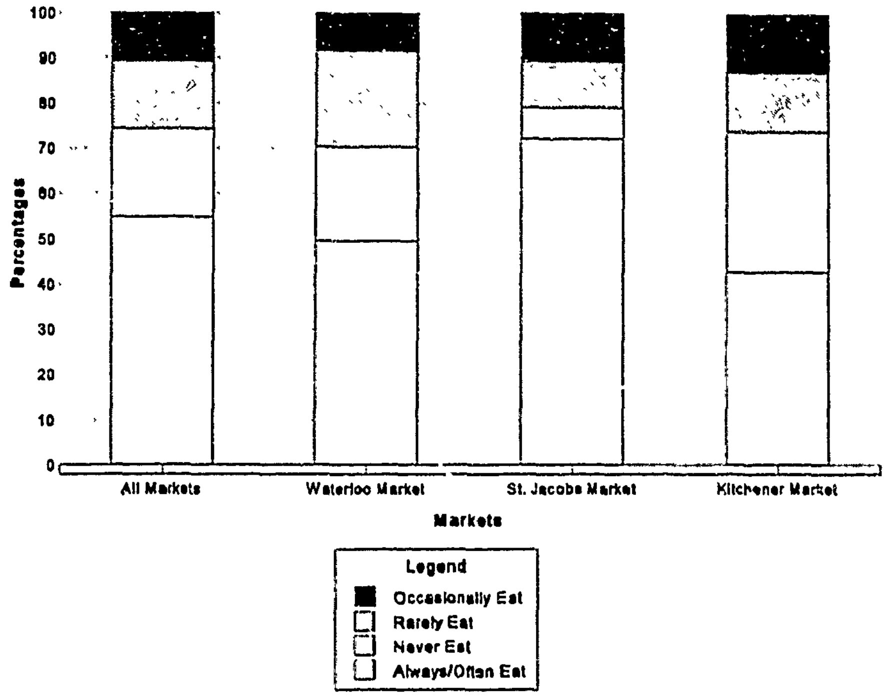
The type of goods purchased at the markets was examined in the questionnaire. The two most popular goods at all markets were meat, fish and poultry products, representing 29.3% of the goods purchased and fruit and vegetables at just under 30% of goods purchased. Also popular were baked goods at 16.8%, dairy products and eggs at 11.3%, handicrafts at 6.0% and homemade goods at 5.4%. In Scriver's study, vegetables, meat and fruits were the main purchases in order of popularity, with baked goods, cheese/eggs and arts and crafts following respectively (Scriver, 1990, 103). The Waterloo Market had 29.2% of its customers purchasing meat products, 28.8% purchasing fruit and vegetables. 19.9% buying baked goods, 9.5% purchasing eggs and dairy products, and 5.1% each purchasing handicrafts and homemade goods. The St. Jacobs Market had similar figures to the Waterloo Market with 28.2% of its customers purchasing meat products, 26.3% fruit and vegetables, 15.2% baked goods, 9.0% egg and dairy products, 9.8% handicrafts and 5.6% homemade goods. The Kitchener Market had 30.4% of its customers purchasing meat products, 28.4% fruit and vegetables, 15.3% each purchasing baked goods and eggs and dairy products and 5.4% homemade goods. As it can be seen meats, fish, poultry, fruit and vegetables acccunt for over half of customer purchases at each of the markets. In terms of a chi-square statistic, the question did no lend itself to be tested as customers were asked to pick as many goods as they purchased at the markets. As the possibility of putting all possible combinations of goods into one answer would be too large, the chi-square was left out of this analysis.

Figure 4.19 - Goods Purchased at the Farmers' Market



Another question that dealt with food was posed at the markets. This question asked if the customer ate while shopping at the market to determine if there was a leisure component involved with the markets. Overall, 54.6% of the customers said they always or often ate food products during their market visits, with 19.6% never eating, 15.1% rarely eating and 10.6% occasionally eating. Scriver (1990) also had a large percentage of people always or often eating at 39.9%, with 26.2% never eating, 18.5% rarely eating and 13.1% sometimes eating (Scriver, 1990, 102). These figures by Scriver can be seen in Table 4.1. The figures show there is a fairly large group of people that eat and a second large group that don't eat at the markets. The Waterloo Market had 49.5% of its patrons eating always and often, with 21.3% rarely eating, 20.8% never eating and 8.4% occasionally eating. The St. Jacobs Market had the highest number of people eating always or often (72.2%), 10.7% occasionally eating, 10.2% rarely eating and 7% never eating. The Kitchener Market had the lowest percentage of regular eaters (42.8%) and the highest percentage of patrons never eating (31.0%), in addition to 13.4% who rarely eat and 12.8% who occasionally eat. From these figures it can be seen that the St. Jacobs Market had the greatest percentage of customers who enjoy eating at the market while the Kitchener Market had the lowest percentage of customers that eat at the market. This suggests that the St. Jacobs Market is more of a leisure market while the Kitchener Market is more of a basic shopping trip market. The St. Jacobs Market also had more eating establishments than the other markets. There was a significant and strong association between markets in regards to the frequency of food eaten, with a chi-square value of 56.9. Individually, the chi-square values were significant for all the markets, with the strongest association between the St. Jacobs and Kitchener Markets.

Figure 4.20 - Frequency of Food Eaten at the Farmers' Markets



$x^2 = 56.9 \quad p = 0.00$

Table 4.1 - Scriver's Frequency of Eating or Drinking at Markets

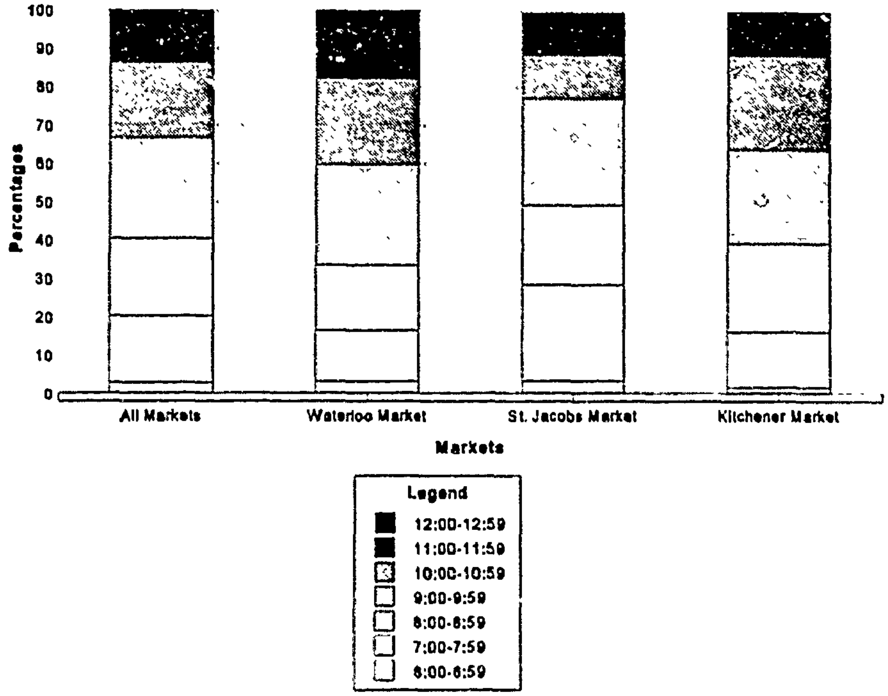
Frequency of Eating	Frequency (%)
Always	31.2%
Often	8.7%
Sometimes	13.1%
Rarely	18.5%
Just Today	2.4%
Never	26.2%

Source: Scriver, 1990, 102

4.4.7 Arrival and Staying Times

A question that dealt with the time of arrival at the markets was also asked of the patrons. Many customers overall (26.3%) said they arrived between 9.00 and 10.00 with 20.2% arriving between 8.00 and 9.00, 19.6% between 10.00 and 11.00, 17.5% between 7.00 and 8.00 and 10.4% between 11.00 and 12.00. Scriver's (1990) study had three arrival times that all had similar percentages. The time 8.00 to 9.00 had the highest percentage at 22.6%, with 10:00 to 11:00 at 20.9% and 9:00 to 10:00 at 19.7% (Scriver, 1990, 102). At the Waterloo Market, 26.4% of the patrons arrived between 9.00 and 10.00 with 22.4% arriving between 10.00 and 11.00, 16.9% between 8.00 and 9.00 and 13.4% each between 7.00 and 8.00 and between 11.00 and 12.00. The St. Jacobs Market had 27.9% of its patrons arriving between 9.00 and 10.00, 25.1% between 7.00 and 8.00, 20.8% between 8.00 and 9.00, 11.5% between 10:00 and 11:00 and 3.3% arriving between 12.00 and 1.00. At the Kitchener Market there was an equal percentage (24.7%) that arrived between 9.00 and 10.00 and also 10.00 and 11.00, 23.1% arrived between 8.00 and 9:00, 14.5% between 7.00 and 8.00 and 9.7% between 11.00 and 12.00. As it can be seen for all of the markets, the 9:00 to 10.00 time period was the most popular time of the day for patrons to come to the markets. The relationship between markets was quite strong and significant with a chi-square value of 31.4. Individually, both the St. Jacobs and Waterloo and St. Jacobs and Kitchener Markets had a strong and significant association, while the Waterloo and Kitchener Markets were not significant. The Waterloo and Kitchener Markets had the most similar arrival times of the three markets.

Figure 4.21 - Arrival Time at the Farmers' Markets



$x = 31.4 \quad p = 0.01$

Once at the markets the customers stayed for various lengths of time. Overall, 36 3% of the patrons stayed between 46 and 60 minutes, with 18.8% between 15 and 30 minutes, 16.1% between 91 and 120 minutes and 9.8% between 76 and 90 minutes. In Scriver's study, the largest group (29.0%) stayed between 46 and 60 minutes, with 15.5% staying between 16 and 30 minutes, 14.3% between 31 and 45 minutes, 13.1% over 121 minutes and 10 7% between 91 and 120 minutes (Scriver, 1990, 101). In Scriver's case, the Kitchener Market was not taken into consideration. Between the two studies, the top two popular staying times was between 46 and 60 minutes and 16 to 30 minutes (Table 4.2). The Waterloo Market had 38.7% of its patrons stay between 46 and 60 minutes, 20.1% between 15 and 30 minutes, 12.6% between 76 and 90 minutes and 11.6% between 91 and 120 minutes. The St. Jacobs

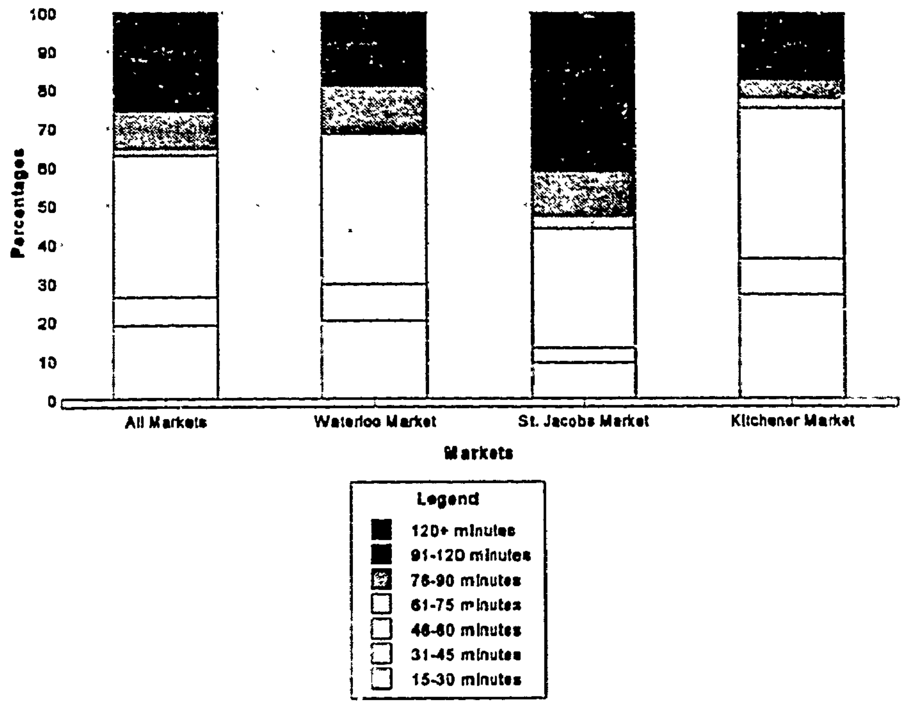
Market had 30.8% of its customers staying between 46 and 60 minutes, 26.5% between 91 and 120 minutes, 14.6% over 121 minutes and 11.9% between 76 and 90 minutes. The Kitchener Market had 39.2% of its patrons staying between 46 and 60 minutes, 26.9% between 15 and 30 minutes, 10.8% between 91 and 120 minutes and 9.1% between 31 and 45 minutes. The most noticeable trend from these figures was at the St. Jacobs Market where all of the largest patron groupings dealt with staying times of over 46 minutes. This again illustrates that the St. Jacobs Market is a market where patrons are more leisurely and take a longer period of time to do their shopping. There was a strong and very significant association between markets with a chi-square value of 62.9. The strong association was evident with the St. Jacobs & Waterloo and St. Jacobs & Kitchener Markets with chi-square values of 37.1 and 46.7 respectively. There was only a slightly significant chi-square value between the Waterloo and Kitchener Markets, as both markets shared similar travelling times

Table 4.2 - Scriver's Minutes Spent at Markets by All Respondents

Minutes	Frequency
0 - 15	1.4%
16 - 30	15.5%
31 - 45	14.3%
46 - 60	29.0%
61 - 75	10.7%
76 - 90	5.2%
91 - 120	0.7%
121 +	13.1%

Source: Scriver, 1990, 101

Figure 4.22 - Length of Stay at the Farmers' Markets in Minutes



$x^2 = 62.9 \quad p = 0.00$

4.4.8 Activities Before and After the Markets

A number of questions were asked of the patrons to see the effect of farmers' markets on their shopping trips directly before and after their market visits. It was determined that 84.0% of the patrons overall were very focused and did not stop at another store before coming to the markets. Of the 16.0% that did visit another store, 84.8% of them visited one business and 13.1% visited two businesses. Businesses that were popular stops included retail/service stores (46.9%), restaurants (20.8%), other farmers' markets (18.8%) and grocery stores (8.3%). The locations of these businesses included Waterloo (45 7%), Kitchener (42.6%) and St. Jacobs (7.4%). The after market trips were divided into a number of categories. Nearly half (49.2%) of the patrons went home, 23.2% travelled to a retail shop, 8.0% went grocery shopping, 4.6% went to another farmers' market, 4.3% travelled to a restaurant and 3.7% went to a recreational event. Over a third of these activities were in Waterloo, 45.9% in Kitchener and 11.2% in St. Jacobs.

The Waterloo Market had 19.0% of its patrons visiting businesses before they came to the market. Here, 77.5% of these patrons shopped at one business while 20.0% shopped at two businesses. Of those businesses visited, half were of the retail/service nature, 28.9% being other farmers' markets, 15.8% restaurants and 5.3% grocery stores. Over two-thirds (69.4%) of the patrons shopped in Waterloo, with equal percentages (13.9%) shopping in Kitchener and St. Jacobs. After visiting the market, haif of the patrons said they would travel straight home, 22.7% would retail shop, 9.5% visit another farmers' market, 9.0% grocery shop, 3.8% eat at a restaurant and 3.3% would visit family or friends. Close to 56.0% of these activities would be located in Waterloo, 23.5% in Kitchener and 9.8% in St. Jacobs.

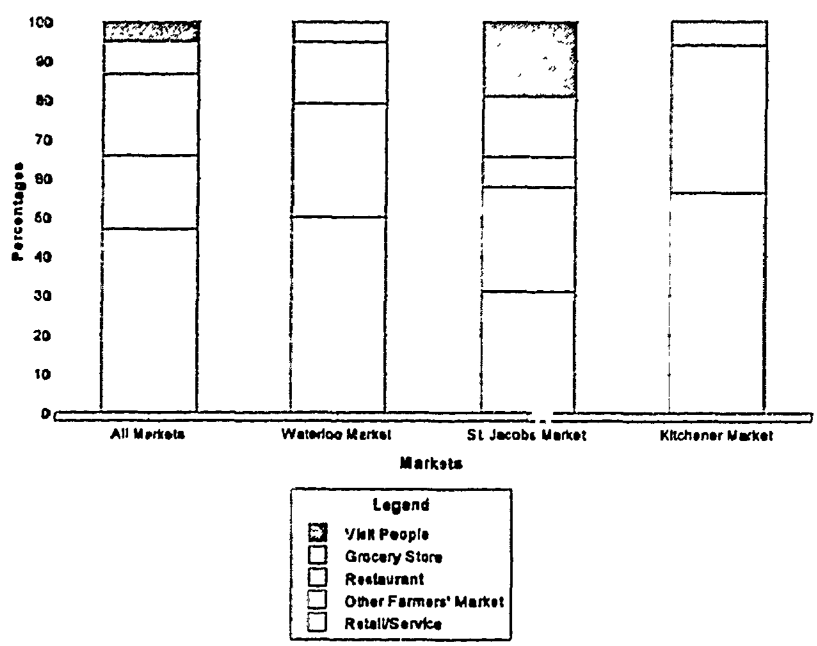
The St. Jacobs Market had 12.6% of their patrons shopping at other stores before they arrived at the market. A majority of these customers (92.3%) shopped at one store and 7.7% at two stores. The types of activities were divided into 30.8% retail/service stores, 26.9% other farmers' markets, 19.2% visiting people, friends or relatives and 15.4% grocery stores. Two-thirds of these activities (65.4%) were in Waterloo, 26.9% in Kitchener and 3.8% in St. Jacobs. Customers were asked where they would travel after the market. The results showed that 54.0% went home, 22.8% retail shopping, 6.0% grocery shopping, 4.7% a restaurant, 4.2% a recreational activity and 2.8% went to work. Many of these activities (42%) were located in Waterloo, with 27.5% in St. Jacobs and 23.2% in Kitchener.

The Kitchener Market had 16.5% of their patrons shopping at businesses before they came to the market. Close to 88% of these shoppers patronized one business while 9.1% patronized two businesses. Of the businesses visited, 56.3% were retail/services, 37.5% restaurants and 6.3% grocery stores. The majority, 87.5% of these businesses, were located in Kitchener and 3.1% each in Waterloo and St. Jacobs. After visiting the Kitchener Market, many of the patrons (44.5%) said they would go home, 24% would retail shop, 9.0% would grocery shop, 4.5% eat at a restaurant, 6.0% participate in a recreational activity and 5.5% another activity such as a parade, library, church, motel or club. None of the patrons at the Kitchener Market visited another farmers' market beforehand.

As it can be seen, there are a few differences between the various farmers' markets. In visiting activities before the market, many people visited retail or service stores. At the St Jacobs Market, there were fewer people travelling to a retail store than the other two markets and there was a larger percentage of patrons visiting friends or family before. This suggests the St. Jacobs Market is more of an outing shared with family and friends or part of larger trip to the Waterloo Region that involves visiting with family and friends. In addition, there were differences between the two north-Waterloo markets and the Kitchener Market. Nearly all the activities of the patrons at the Kitchener Market took place in Kitchener, before and after the market, while many activities at the other two markets took place in Waterloo

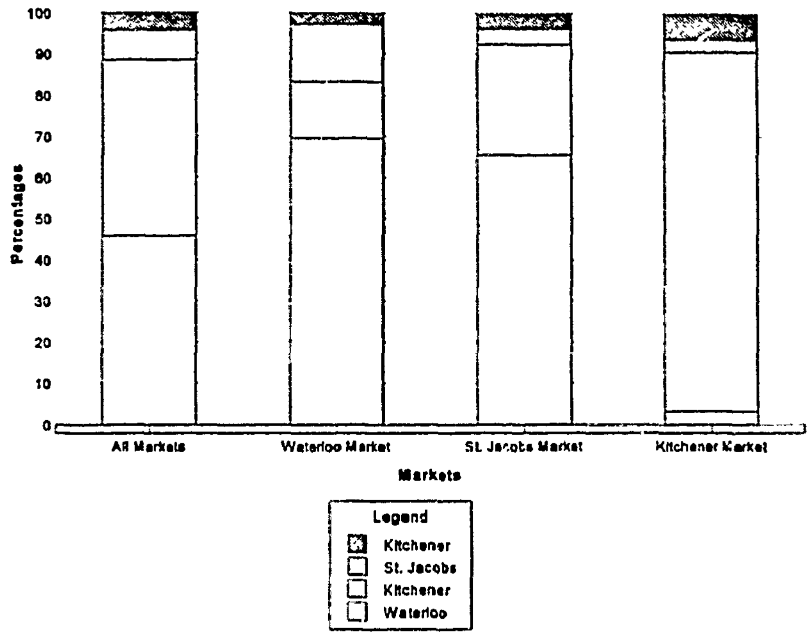
In all cases, there was a strong and significant association between the markets and the places and businesses before and after the markets. The variable that examined the types of businesses before coming to the market was also very significant with a chi-square value of 46.7. Individually, all of the markets also had very significant and strong associations with the types of businesses. The chi-square value for the business locations visited before the market was 33.6 and was very significant with a significance level of 0.00. Each of the markets individually had significant chi-square values. The places visited after the market was strongly associated between markets with a chi-square value of 38.9. However, for the St. Jacobs and Kitchener Markets, this variable was insignificant suggesting similar places visited at both markets. The strongest and most significant chi-square value was evident in the choice of locations for businesses after the market, with a value of 116. The Kitchener Market was very significant individually as the locations were quite different from the St. Jacobs and Waterloo Markets. As a majority of people were local at the Kitchener Market, many of the activities took place right in Kitchener.

Figure 4.23 - Type of Businesses Visited Before Trip to Farmers' Markets



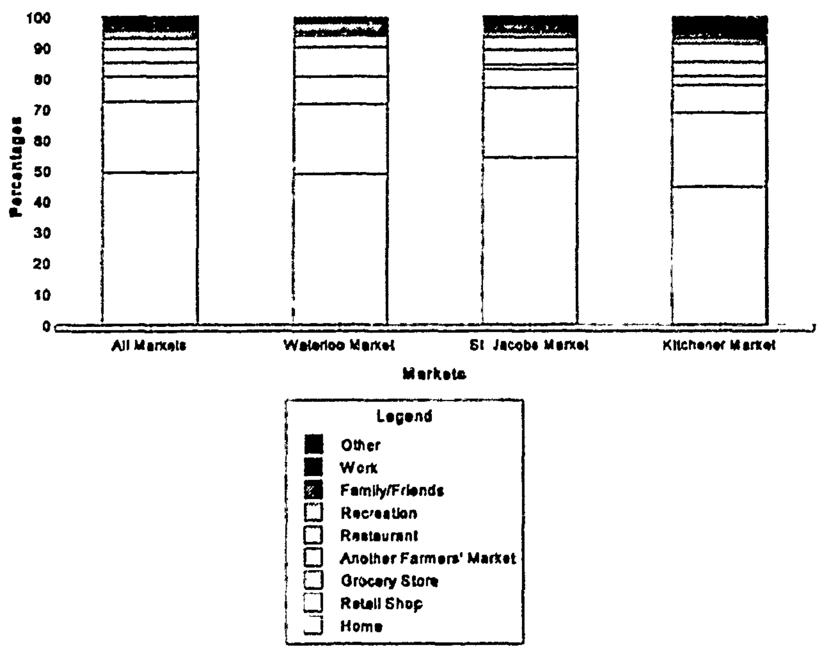
$x^2 = 33.6 \quad p = 0.00$

Figure 4.24 - Location of Businesses Visited Before Trip to Farmers' Markets



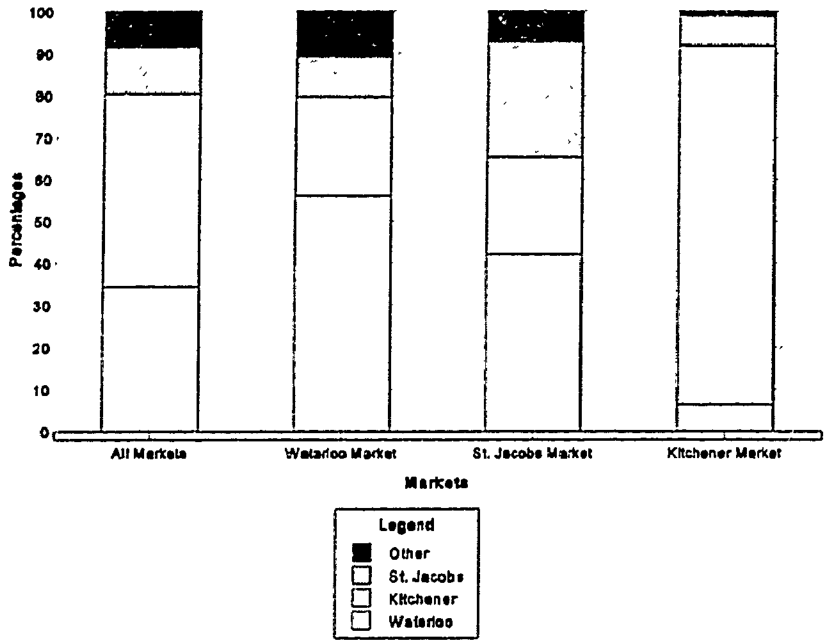
$x^2 = 46.7 \quad p = 0.00$

Figure 4.25 - Businesses Visited After the Farmers' Markets



$x^2 = 38.9 \quad p = 0.00$

Figure 4.26 - Location of Businesses Visited After the Farmers' Markets



$x^2 = 116.0 \quad p = 0.00$

Scriver (1990), combined the statistics of the journey to and from the market and examined the total number of stops on the outing. She found 22.4% of all respondents answered the market was their only stop. from their residence, to the market and back home again. A larger percentage (43.2%), indicated that they had planned to make another stop on their trip to the market. As mentioned before, grocery trips were the most popular activities when combined with shopping at the market. The following table examines the number of stops made by respondents.

Table 4.3 - Scriver's Number of Stops on Outing

Number of Other Stops	% of Respondents
0	22.4%
1	43.2%
2	21.6%
3	6.2%
4	3.6%

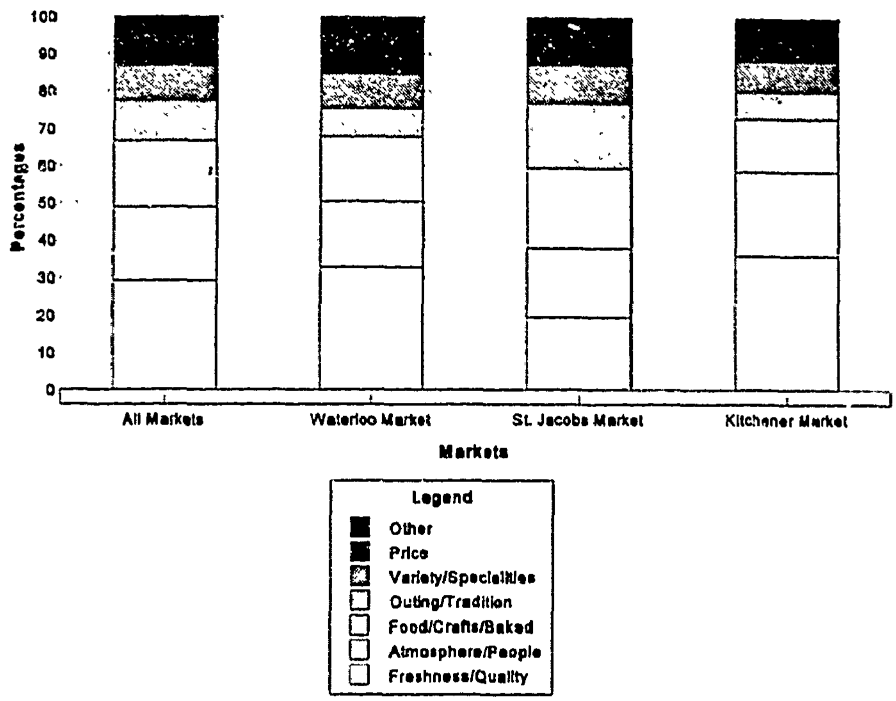
Source: Scriver, 1990, 137

4.4.9 Qualitative Questioning

Four qualitative questions were asked of the patrons in order to get a personal feeling from the patrons of what farmers' markets meant to them. These questions included "Why do you shop at farmers' markets?", "Why did you pick this particular farmers' market?", "Would you change anything about this particular market?" and "What type of experience does the farmers' market represent to you?". A number of answers were given for each of these questions with the main responses summarized below.

When asked, "Why do you shop at farmers' markets?", many customers overall (29.2%) responded by saying the freshness and the quality of the meats, dairy goods, fruit and vegetables. Another popular answer at 19.5% was the friendly atmosphere and people (vendors) that were at the markets. Close to 18% liked the food, crafts and baked goods, while 10.8% enjoyed the outing and tradition of coming to the markets while 9 3% commenting positively on the variety and speciality items and 8.6% for the reasonable prices Other reasons were also given (accounting for 4.7% of the answers) for coming to farmers markets including the seasonal aspects and items found at markets, the recreational outing associated with markets and bus trips coming to the area stopping at the markets. In Scriver's (1990) study, price was the most popular answer, followed by freshness, atmosphere, produce, quality, selection and meat (Scriver, 1990, 127). The Waterloo Market had similar answers as the overall results with 32.6% citing the freshness and quality, 17.6% for both atmosphere and people and food, crafts and baked goods, 11% price, 9.3% variety and speciality items and 7.6% for tradition and an outing. The St. Jacobs Market differed with 21.7% of its respondents enjoying the food, crafts and baked goods, 19.3% coming for the freshness and quality, 18.4% for the atmosphere and people, 10.4% for the variety and speciality goods and 8.3% for price. The Kitchener Market had 35.8% of its patrons enjoying the freshness and quality of the market, 22.6% for the atmosphere and people, 14.4% for the food, crafts and baked goods, 8.3% for variety and speciality goods, 7.3% for an outing and tradition and 6.1% for price. In this case, the St. Jacobs Market stood out with its customers rating food, crafts and baked goods as more of an important reason for coming to the market rather than freshness and quality that was the number one choice at the other two markets. There was a significant and strong association between markets with a chi-square value of 54.8. These significant values were also evident when comparing the individual markets, especially between the St. Jacobs and Kitchener Markets.

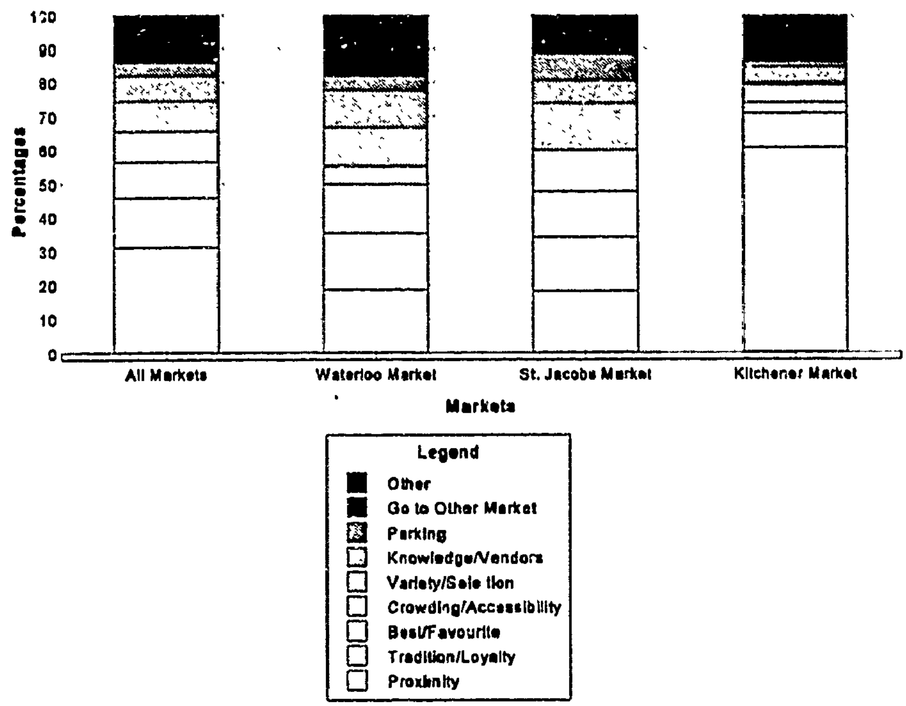
Figure 4.27 - Why Do You Shop at Farmers' Markets?



$x^2 = 54.8 \quad p = 0.00$

Another question posed to the patrons was why they picked the market they were at as opposed to another farmers' market in the region. Overall the most popular answer with 31.1% of the patrons was proximity to their home, with 14.5% citing tradition and loyalty toward the market, 10.6% explaining it was their favourite or best of the markets, 9.1% said the crowd was less or the accessibility was greater and 9% enjoyed the variety and selection. Proximity to the market was also the top answer for each of the three markets. Close to a fifth (18.5%) of the patrons at the Waterloo Market came there as the proximity was ideal, 16.7% for the tradition and loyalty, 14.5% said it was the best or their favourite, 11.5% liked the variety and selection and 11.0% enjoyed the vendors and their knowledge of the goods and customers. Close to a fifth (18.1%) of the patrons at the St. Jacobs Market cited proximity as the most important reason for attending that market, with 16.0% coming for the tradition and loyalty, 13.9% for variety and selection, 13.5% stating it was the best or their favourite and 12.2% explaining it was less crowded or more accessible. Also, a large percentage (10.4%) of patrons commented that they were also going to or had visited another farmers' market. This suggests that many of the customers at the St. Jacobs Market considered the markets more of a recreational trip than a primarily shopping trip at one market. At the Kitchener Market proximity was the overwhelming answer (60.6%) why it was chosen as the market of choice by its patrons. Around 10% had other reasons including the organization, prices and cleanliness, 10.3% mentioned tradition and loyalty, 5 4% said there was less crowding or more accessibility and 4.9% came because of the vendors and their knowledge of their goods and the people. Only 3.0% considered the Kitchener Market as their favourite or best farmers' market. The Kitchener Market is in a downtown location that is easily accessible by many modes of transportation, which appears to be important to the customers that use it. The chi-square value in this was very strong and significant with a value of 157.0. The large differences in answers between markets was attributed to the Kitchener Market that had a high percentage of people choosing proximity as their main choice for choosing the market. The chi-square values for the St. Jacobs and Kitchener and Waterloo and Kitchener Markets were both very high and significant with values of 119 9 and 98.4 respectively.

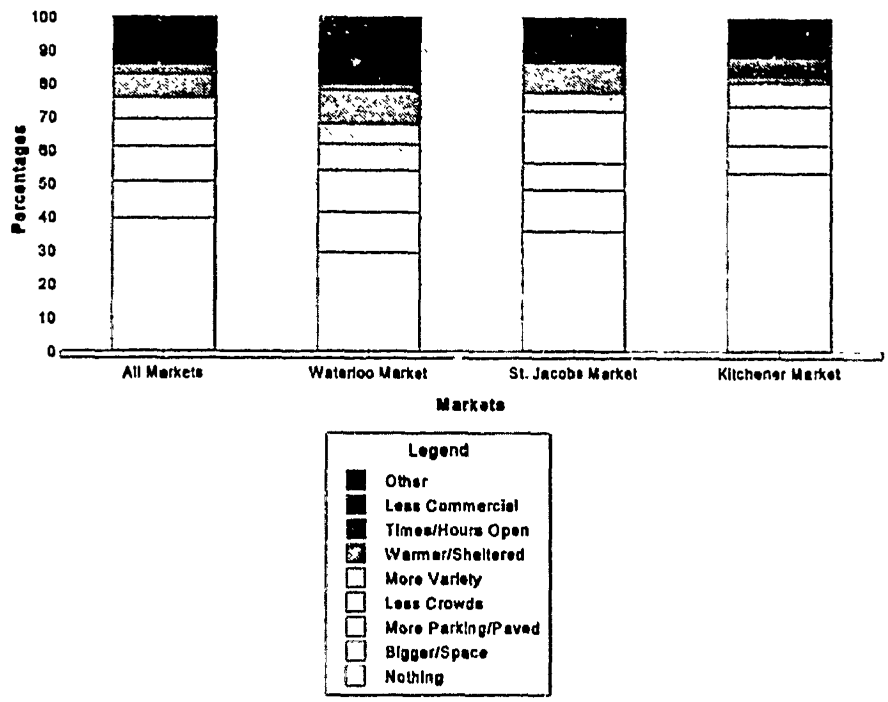
Figure 4.28 - Why Did You Pick This Particular Farmers' Market?



$x^2 = 157.0 \quad p = 0.00$

Another question was asked to see if the customers would change anything about the farmers' market they were patronizing. Overall, 39.5% stated that they would change nothing about the market, 10.9% would make it bigger or more space available on the inside, 10 6% said they would like to see more parking, or paved parking, 12.1% each felt that less crowding of people would be better or had other reasons (more entertainment, better smells, higher quality products) and 7.2% said it could be warmer or have more sheltered space for goods. At the Waterloo Market, 29.3% of the patrons said nothing needed to be changed, 13.2% said other reasons (as mentioned above), 12.6% mentioned more parking or paved parking, 12% cited a bigger space, 10.2% felt it should be warmer or more sheltered spaces and 7.8% said they would have fewer crowds. The St. Jacobs Market patrons stated changing nothing was their primary reason (35.8%), 15.6% would like to see less crowding, 1L.3% wanted a bigger space to shop and move around in, 9.0% mentioned it could be warmer or have more sheltered spaces, 8.0% thought there should be more parking or paved parking and 5.7% thought more variety was needed. At the Kitchener Market, more than half the patrons were satisfied (53.3%) saying that nothing needed to be changed, 11 7% stated more parking was needed, 8.3% wanted a bigger space or room to move around in, 8 9% had other reasons including more entertainment, better smells and higher quality products, 7 2% wanted more variety and 5.6% thought the time it was opened could be changed. During the week, the Kitchener Market had changed its time of operations recently, moving it from Wednesday to Thursday. In addition, the hours changed on Thursday from noon to 7:00 at night to 8.00 in the morning until 3.00 in the afternoon. As a result of these of these changes, some of the patrons were unhappy with the new times. The chi-square value in this case was significant and strong with a value of 78.9. Two similar significant values of 56.9 and 50 0 were found at the St. Jacobs and Kitchener Market and the Waterloo and Kitchener Markets respectively. There was not a significant chi-square for the St. Jacobs and Waterloo Markets, as both markets had similar answers to the question regarding changes to the markets

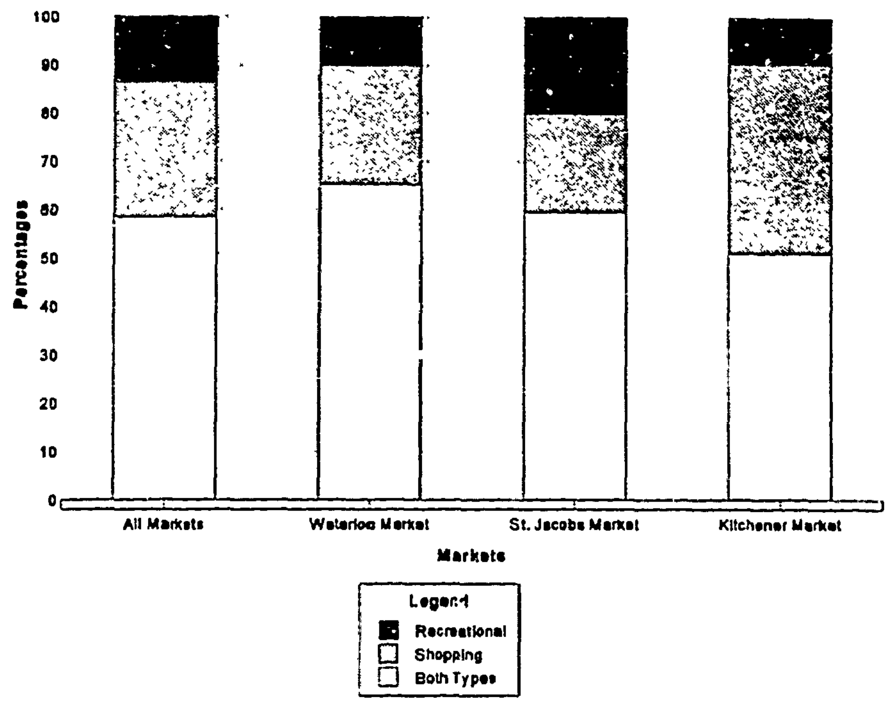
Figure 4.29 - Would You Change Anything About this Particular Farmers' Market?



$x^2 = 78.9 \quad p = 0.00$

A final question posed, asked what type of experience the farmers' market represented. The answers were either a primarily shopping experience, a primarily recreational experience or both types of experiences. Overall, many patrons (58 4%) considered the farmers' market both a shopping and recreational experience, with 28 0% considering it a primarily shopping experience and 13.3% a recreational experience Scriver's (1990) market study found 73% of the patrons considered the market was both a shopping and recreational experience with 16% a shopping experience and 11% felt it was primarily a recreational trip (Scriver, 1990, 104). Here, Scriver found more patrons considering the markets both a shopping and recreational experience. At the Waterloo Market, close to two-thirds (65.1%) of the patrons thought it was both a shopping and recreational experience, 24.9% a shopping experience and 10.0% a recreational experience. The St. Jacobs Market had 59.5% of its patrons stating it was both a recreational and shopping experience, 20.5% a shopping experience and 20.0% a recreation experience. The Kitchener Market had about half (51%) of its patrons stating it was both a recreational and shopping experience, with 39.5% saying it was a shopping experience and 9.5% stating it was a recreational experience. After examining these results, it was found that the St. Jacobs Market had the highest percentage of customers that thought the market was a recreational experience (double the percentage of both the Waterloo Market and Kitchener Markets). This would again show the strong recreation and leisure aspects of the St. Jacobs Market. In addition, many patrons at the Kitchener Market found it to be primarily a shopping experience, that again would again support the idea that the Kitchener Market is used by local people to do regular weekly or biweekly shopping. In regards to the chi-square value, a significant and fairly strong association was found with the type of experience. The chi-square value in this case was 29.1. The type of experience was also significant with the individual markets with the strongest association occurring with the St. Jacobs and Kitchener Markets.

Figure 4.30 - Type of Experience That Farmers' Markets are to You?



$x^2 = 29.1$ $p = 0.00$

4.5 Conclusions From Previous Market Studies

After examining the current study and comparing it with previous studies on the same farmers' markets, a number of similarities and differences appeared. The Kitchener Market study by Rawls (1965) stated the wide tourist appeal of the market. At that time, the Kitchener Farmers' Market was the focal point and was the main farmers' market which attracted a majority of the market business in the area, including tourists from all over As evidenced with the present study, the tourist component has somewhat shifted away from the Kitchener Market which now attracts a primarily local clientele, whereas the St Jacobs and Waterloo County Farmers Markets have attracted tourists from a wide area.

Hayes (1976) again studied the Kitchener Market and found just over half of her respondents were from the area, many of whom were fairly young in age. With the current study, a trend towards more local patrons was found in addition to an older patron base made up of patrons 55 years of age and over. Hayes also found that 90% of the patrons spent under $20 at the market, while the current study found that nearly three-quarters of the patrons spent between $11 and $50 a visit. As there was nearly a 20 year time difference, prices have probably gone up, which would warrant an increase in the spending found with the current study.

Another study, Zundel (1982) examined the Waterloo County Farmers' Market. Zundel found that over half of the patrons travelled as couples, with the present study finding nearly three-quarters travelling with at least one other person. The regularity of the patron visits to the markets were evident in both studies, with many patrons coming weekly to the market. In terms of time spent at the Waterloo Market, more people in the Zundel study stayed between 30 and 60 minutes as opposed to the current study. Zundel stated that freshness and quality were the main reasons for coming to the market, found likewise in the current study. In addition, Zundel found that fruit, vegetables and dairy products were the top three products purchased at the market, while the current study found meats, fish and poultry as popular as the fruits and vegetables.

A final study of the study of the Kitchener Farmers' Market was performed by the Coriolis Consulting Corporation in 1987. This report found that fruit and vegetables were the two most popular products purchased at th market, accounting for 82% and 73% of the patrons respectively. However, the current study found again that meat, fish and poultry products were mentioned as goods purchased more often than fruit and vegetables at 30 4%

and 28.4% respectively. Proximity was found as the main reason in both studies for patrons choosing the Kitchener Market. The majority of spending at the Kitchener Market was found to be under $25 by the Coriolis study, while the majority of spending was between $11 and $50 with the current study. The Coriolis study also found that 88.5% of the market patrons took their personal vehicle to the market compared to 70% with the current study. In addition, more people walked (6% Coriolis and 19% current), with about the same percentages taking the city bus (between 5% and 7%).

4.6 Conclusions of Present Study

The recent market study by Scriver (1990) was the most thorough in terms of its customer questionnaire for the St. Jacobs and Waterloo Markets. Scriver found the average age of the patrons was between 35 and 44, with nearly everyone travelling by car, with a majority travelling under 20 minutes suggesting a localized customer base. This localized customer base comprised a third of the patrons from Waterloo, a quarter from Kitchener and 15% elsewhere in the Region of Waterloo. The most important goods purchased at the markets followed the same trend as the other studies, with vegetables, meat, fruit, baked goods and dairy products as the top five goods purchased. Nearly three-quarters of the patrons felt the market experience was both a recreational and shopping experience and that they came to the markets for reasonable prices, freshness of the food, atmosphere, produce and finally quality of the items. Many patrons came to the markets as part of an extended shopping trip as suggested by the 43% who make another stop on the way from or to the markets.

Overall it can be seen from the results of this study, that there are differences between all three markets with the current study. The Waterloo Market is a periphery market attracting regular patrons from the surrounding area, both rural and urban. This market most closely resembles the term "farmers' market" (of all three markets). The freshness and quality of the food products at this market stood out in the customers' minds. In addition this market had a young and vital customer base, with the highest number of university educated patrons of the three markets, and over a third of its patrons in the under 34 years of age category.

The St. Jacobs Market is again a periphery market attracting patrons from afar, interested in the leisurely and traditional aspects of farmers' market. Very few patrons come alone as it is both a family and friend oriented activity. Nearly a third of the patrons travel long distances (over 46 minutes) to come to this market. The St. Jacobs Market had the least number of patrons that were regulars of the three markets, however it had the highest percentage of patrons who always/often eat at the market. One-fifth of its patrons considered the market primarily a recreational activity. In addition, nearly all of the patrons stayed at least 46 minutes, with many staying over two hours.

The Kitchener Farmers' Market is a market, where many local people come to shop alone. Many patrons are regulars with nearly half of them shopping each week. A majority of the activities that the patrons participate before and after their visits to the market are located in Kitchener. One of the primary reasons why patrons chose this market was its proximity or location. Location plays a key role with this market as it attracts those people that cannot rely on personal vehicle for their shopping trips. Finally over half of the patrons that visited the market were over 45 years in age with 38% of these people older than 55.

Chapter 5

Conclusions

Questions that arose from the literature and hypotheses that were listed at the end of Chapter 2 are addressed in this section. The conclusions are broken down first by an examination of the chi-square values mentioned in Chapter 4, including commonalities found between variables. Two other sections examine the market experience by the place of residence and the frequency of patrons at the markets and their spending patterns. Conclusions will also be presented on the individual markets, summarizing both the supply and demand sides of the markets including the results from Chapter 4. The chapter will then end with comments, final conclusions and future contributions of farmers' markets.

It must be noted that the conclusions presented represent one point in time due to the time of the surveys. Farmers' markets are dynamic and change from season to season. Certain types of items such as fresh vegetables are available in greater quantities during the summer rather than in the fall or winter seasons. Farmers' markets are constantly adjusting to the seasons by offering more vegetable vendors during the summer months when a greater supply is available. In the same manner, customers also adjust their purchases, frequency of visits and other characteristics based on the season. Therefore the conclusions presented are based on results from the late fall and may not be representative of results taken at other times of the year.

Table 5.1 - Summary Chi-Square Values For All Markets

	Overall		St. Jac.-Water.		St. Jac.-Kit.		Water.-Kit.	
Variable	x^2_0	p_0	x^2_1	p_1	x^2_2	p_2	x^2_3	p_3
Time of Survey	31.6	0.00	18.8	0.00	*4.4*	*0.11*	26.4	0.00
Gender	*4.3*	*0.12*	4.3	0.04	*1.2*	*0.27*	*0.87*	*0.35*
Age	46.1	0.00	8.5	0.04	37.5	0.00	24.0	0.00
Education Level	34.2	0.00	*8.3*	*0.08*	19.3	0.00	23.7	0.00
Employment Status	41.5	0.00	11.8	0.02	36.0	0.00	13.7	0.01
Come Alone?	40.4	0.00	8.6	0.00	39.7	0.00	12.2	0.00
# of Additional People	56.0	0.00	24.3	0.00	39.1	0.00	18.3	0.01
Patron Characteristics	*7.4*	*0.12*	*2.6*	*0.27*	*5.4*	*0.07*	*3.9*	*0.14*
Mode of Travel	122.1	0.00	*5.6*	*0.06*	63.9	0.00	64.1	0.00
Length of Travel	49.3	0.00	*13.0*	*0.16*	39.7	0.00	19.1	0.02
Areas Travelled From	85.2	0.00	13.0	0.00	51.7	0.00	55.2	0.00
Frequency at Market	72.6	0.00	28.9	0.00	44.8	0.00	32.1	0.00
$ Goods Purchased at Market	*7.7*	*0.47*	*3.7*	*0.45*	*4.2*	*0.38*	*3.8*	*0.43*
% Monthly Budget Spent at Market	21.3	0.05	*8.6*	*0.20*	15.9	0.01	*6.4*	*0.38*
Eat at Market?	56.9	0.00	29.5	0.00	46.0	0.00	11.9	0.02
Time of Arrival at Market	31.4	0.01	19.9	0.01	18.8	0.02	*6.8*	*0.43*
Length of Stay	62.9	0.00	37.1	0.00	46.7	0.00	14.0	0.05
Business Types Before	46.7	0.00	11.2	0.02	23.3	0.00	12.6	0.01
Business Locations Before	33.6	0.00	*3.0*	*0.39*	26.8	0.00	41.1	0.00
Places Visited After	38.9	0.00	23.2	0.00	*8.6*	*0.38*	22.8	0.00
Location of Places After	116.0	0.00	9.8	0.02	74.4	0.00	82.0	0.00
Why Shop at Farmers' Markets?	54.8	0.00	22.2	0.00	39.7	0.00	16	0.02
Why this Particular Market?	157.0	0.00	*12.0*	*0.22*	119.9	0.00	98.4	0.00
Change Anything about Market?	78.9	0.00	*17.8*	*0.06*	56.9	0.00	50.0	0.00
Type of Experience	29.1	0.00	8.4	0.02	21.7	0.00	10.3	0.01

Notes: x^2_0 = Chi-Square Overall p_0 = Significance Overall x^2_1 = Chi-Square for St. Jacobs & Waterloo p_1 = Significance for St. Jacobs & Waterloo x^2_2 = Chi-Square for St. Jacobs & Kitchener p_2 = Significance for St. Jacobs & Kitchener x^2_3 = Chi-Square for Waterloo & Kitchener p_3 = Significance for Waterloo & Kitchener
Insignificant differences between variables ($p > 0.05$) are highlighted in italics.

5.1 Conclusions of Chi-Square Values for All Markets

After examining Table 5.1 a number of conclusions can be made from the chi-square and significance values. Out of the 25 variables listed on the table, 22 were significant overall and three were insignificant. After examining the chi-square statistics between the Waterloo and St. Jacobs Markets, it was found that nine out of the 25 chi-square values were insignificant. These two markets had the greatest number of similarities between variables of the three possible market combinations. The St. Jacobs Market and Kitchener Market had five insignificant variables in the chi-square analysis. Likewise, the Waterloo and Kitchener Markets had five insignificant variables.

5.11 Commonalities In the Categories Overall

After examining Table 5.1 which summarized the chi-square values for all markets, a number of insignificant chi-square values appeared that showed similarities rather than differences between markets. With the overall chi-square values for all the markets, three variables were found to be insignificant. The gender of the patrons was very similar between the markets with an overall significance value of 0.12. The proportions of males and females were similar (about half of each), except for the St. Jacobs market, which had closer to 60% females and 40% males. As the farmers' markets had an equal mix of males and females shopping, this was reflected in the sample of patrons. The characteristics of patrons was another variable that was insignificant between markets with a significance value of 0 12 In this case, it was found that between markets there were approximately two-thirds family members, with the remainder friends and a small percentage of tour groups Although the groups of people that came to the markets were similar, their attitudes, perceptions and behaviours were different in choosing to come and being at the various markets. A final variable that was similar between markets was the value of goods purchased. With all farmers' markets, customers tend to buy the same types of goods, the top three being meat/fish/poultry, fruit/vegetables and baked goods. Even though the markets may offer different products to the consumers (which is a determinant of the supply side characteristics) many of the customers travel to the markets for the same type of goods. With many of the customers buying similar goods, the value of these goods was also quite similar.

As it was found, certain variables were evident in this study that did not distinguish different types of markets as their characteristics were similar between markets. The demand side characteristics as mentioned above, relied heavily on characteristics that were different between markets, including distance travelled, the location of markets and the reasons for coming to the different markets. In this way, although farmers' markets in Kitchener-Waterloo are different there are certain similarities between customers drawn to the same type of activity.

5.12 Commonalities In the Categories For the Individual Markets

A number of commonalities existed between the Waterloo and St. Jacobs Markets, as can be seen in Table 5.1. Six variables were strongly insignificant ($p > 0.1$), or strong similarities between the variables and included the patron characteristics, length of travel, value of goods purchased, percentage of monthly budget spent, business locations before and reasons for picking this particular market. Many of the similarities mentioned in the variables above were due primarily to the location of the two markets. As the markets are located adjacent to one another, similar patron characteristics, perceptions and behaviours are shared between the two markets. This would be particularly true for the length of travel and the business locations visited before. In addition, reasons for picking the particular market were similar between the Waterloo and St. Jacobs Markets. As there was a cross-over affect between the two markets (customers shopping at both markets) many of the reasons for choosing a particular market were similar. Another variable that was strongly insignificant was the percentage of the monthly food budget spent at the markets. This variable was also strongly insignificant for the Waterloo and Kitchener Markets. A possible reason for these similarities could relate back to the survey where patrons may have not fully comprehended the question or knew of an accurate answer. The patrons therefore may have given an answer to the best of their knowledge, which may have been similar across these two sets of markets Finally, one strong insignificant difference existed (other than the combined chi-squares insignificant statistics) for the St. Jacobs and Kitchener Markets. The variable in this case was businesses visited after the farmers' markets. The patrons from the Kitchener and St. Jacobs Markets in this case participated in similar activities after the markets, which included going home, retail shopping and grocery shopping. Although similarities existed between the individual markets, there were many significant differences that determined their unique demand side qualities that separated the markets from one another.

5.2 Conclusions of Market Experience and Place of Residence

In order to examine the relationship of the market experience and patrons' place of residence, additional crosstabulations were performed. The first table (Table 5.2) examined this relationship for all of the customers at the three markets, using total percentage figures for each of the categories. Overall, the customers that felt that the market was primarily a recreational experience, came from outside the Region of Waterloo. Many of the customers (close to one-fifth overall) that believed that the farmers' markets were a shopping experience arrived from the urban areas of Waterloo and Kitchener. In addition, those customers that found the market to be both a recreational and shopping experience came from all regions, especially Kitchener and outside the area.

Table 5.2 - Experience By Region For All Markets

	Waterloo	Kitchener	Regional	Outside
Recreation	2.1%	2.9%	1.1%	7.2%
Shopping	7.4%	12.3%	2.4%	5.9%
Both	9.8%	20.4%	8.5%	20.0%

Individually, these total percentages differed between the markets. After examining the figures for the St. Jacobs Market (Table 5.3) a number of findings were found. A large percentage (11.6%) of the patrons that found the market to be primarily a recreational experience were from outside the area. This percentage was three times greater than the next highest percentage from Kitchener patrons. Patrons that found the market to be primarily a shopping experience were fairly equally divided over the different regional categories. Many of the patrons (especially those from outside the area) found the St. Jacobs Market to be both a recreational and shopping experience as can be seen by the large percentages in that category.

Table 5.3 - Experience By Region For the St. Jacobs Market

	Waterloo	Kitchener	Regional	Outside
Recreation	2.3%	3.3%	2.8%	11.6%
Shopping	5.6%	5.6%	2.8%	6.6%
Both	9.8%	15.3%	10.7%	23.7%

The Waterloo Market had a fairly large percentage of patrons from Waterloo that felt the market to be primarily a shopping experience. These people were locals from the area and came to the market on a regular basis to do their shopping. In addition there was a large group of patrons in each of the regional categories for both types of experiences.

Table 5.4 - Experience By Region For the Waterloo Market

	Waterloo	Kitchener	Regional	Outside
Recreation	2.4%	2.4%	0.5%	4.8%
Shopping	11.5%	5.3%	2.4%	5.7%
Both	16.7%	18.2%	10.5%	19.6%

The Kitchener Market had a large percentage (58%) of its patrons coming to the market directly from Kitchener. Equal percentages of patrons that found the market to be primarily a shopping experience while those finding it a recreational and shopping experience came from Kitchener. In addition a fairly large group of outsiders found the market to be both a recreational and shopping experience.

Table 5.5 - Experience By Region for the Kitchener Market

	Waterloo	Kitchener	Regional	Outside
Recreation	1.5%	3.0%	0.0%	5.0%
Shopping	5.0%	27.0%	2.0%	5.5%
Both	2.5%	28.0%	4.0%	16.5%

As it can be seen from the above tables, different experiences were evident from the areas patrons came from. Most of the patrons that came from Waterloo found the markets to be either a shopping experience or both a recreational and shopping experience. Those patrons coming from Kitchener found the markets to be both recreational and shopping, with the second largest group finding it to be a shopping experience. Most of the regional and outside the region shoppers found the market to be both types of experiences. The greatest number of people finding the markets to be primarily a recreational experience were those patrons from outside the region at the St. Jacobs Market.

5.3 Frequency of Patrons and Spending at the Markets

In an effort to determine spending characteristics of patrons and their frequency of visits to the markets, a crosstabulation was set up to compare two frequency groupings, those people that shop once a week and also a group that shop twice a year or less. Table 5.6

examines the spending patterns of once a week shoppers (frequent) and twice a year or less shoppers (infrequent).

Table 5.6 - Dollars Spent By Frequency of Shoppers

Dollars Spent	Frequent Shoppers	Infrequent Shoppers
< $10	9.3%	13.5%
$11-$26	37.7%	27.9%
$26-$50	45.4%	29.7%
$51-$75	4.4%	6.3%
> $76	3.3%	22.5%

From the results in Table 5.6, different spending patterns existed between the frequent and infrequent shoppers. A majority of the frequent shoppers (83.1%) spent between $11 and $50, with nearly half spending between $26 and $50. With the infrequent shoppers, different buying patterns were evident as spending percentages were spread over the different groups There was a group of shoppers that came for the novelty of the market and spent very little, as represented by the under $10 purchases. In addition, there were two equal groups of shoppers that spent between $11 and $50. A final large group of patrons (22.5%) spent over $76 at the markets and represented patrons that purchased a large amount goods only twice a year or less at the markets.

5.4 Conclusions of the Individual Markets

5.4.1 The Waterloo County Farmers' Market

The Waterloo County Farmers' Market was hypothesized as a recognisable or true farmers' market after examining the definitions from Tunbridge (1992) and Neuwirth (1990) on the supply side. Neuwirth considered the true farmers' market as a place where farmers buy and sell their own produce directly to customers or wholesalers at stalls. This description fits the Waterloo Market as this particular market had close to double the percentage of farm-type businesses as compared to the St. Jacobs Market from a 1992 survey (Wells & Muncaster, 1992). The Waterloo Farmers' Market is structured to meet the needs of the farming and rural community as one of its primary goals. This goal can be seen with the history of the Waterloo County Farmers' Market. Many of the older vendors, including many Mennonites, that had been a part of old Kitchener Farmers' Market were distressed over the new Kitchener Market. The downtown area was getting congested with traffic and it lacked an area for old order Mennonites to hitch their horses and buggies. In order to rectify the problem, a group of vendors (mostly farmers) banded together to start the Waterloo County Farmers' Market. As a result, the Waterloo Market was built in 1973 to meet the needs of the rural and farming community who disliked travelling to Downtown Kitchener to sell and buy goods (Zundel, 1982, 10).

The tradition appears to continue as the Waterloo County Farmers' Market had the greatest percentage of farmers as vendors when compared with the St. Jacobs' Market. Close to a quarter of the vendors at the Waterloo Market were farmers as compared to 12% of the vendors at the St. Jacobs Market. Also, there was a stronger component of fruit and vegetable vendors as compared to the St. Jacobs and Kitchener Farmers' Markets. Close to a quarter of the vendors sold fruit and/or vegetables, up from the 15% of vendors each at the St. Jacobs and Kitchener Farmers' Market (Wells & Muncaster, 1992 & City of Kitchener, 1992). In this case, the Waterloo Market was the most different of the three markets. From these results, the Waterloo Market can be seen as a true or recognizable farmers' market on the supply side.

On the demand side, the Waterloo Farmers' Market was categorized as being a contemporary and functional urban-fringe market. The market is contemporary in that it has was built 20 years ago in an area surrounded by farmland, with additional space added less than 10 years ago. The market is also contemporary in the fact that over a third of its patrons were young, 18 to 34 years of age category. With young and highly educated patrons, the Waterloo Market has become a vital and growing market.

As the market is located outside the city boundary on the urban fringe, 98% of the patrons travelled to the market by a personal vehicle. Just under a third of the patrons came from FSAs in Waterloo, just over a quarter from Kitchener and 13% from the surrounding rural areas. In addition to the local area, 30% of the patrons came from the many smaller rural areas, particularly to the areas west, north-west and southwest of the Waterloo Market A majority (58%) of the patrons stayed at the market for under 60 minutes suggesting the market was a functional shopping area, for patrons wanting to buy specific goods without spending a lot of time browsing.

In terms of activities before visiting the Waterloo Market, 19% of the patrons visited another business. This market had the highest percentage of patrons visiting businesses before, including the highest percentage of patrons visiting two businesses. These numbers suggest that the Waterloo Market is part of an extended shopping trip that includes businesses along the way. The after market trip consisted of nearly half of the patrons going home and a quarter retail shopping, suggesting that for half of the patrons, the farmers' market is not the last shopping activity.

The type of experience was also asked of the patrons, with two-thirds of the patrons finding the market both a shopping and recreational experience. The Waterloo Market had the highest percentage of patrons that thought the market was both types of experiences and also had the same low percentage (10%) as the Kitchener Market who thought the market was primarily a recreational experience.

5.4.2 The St. Jacobs Farmers' Market

The St. Jacobs Farmers' Market can most accurately be described as a festival marketplace on the supply side, by the definitions of Neuwirth (1990). When more of a non-agricultural or commercial activity is added to a market, the farmers' market takes on a different character which can be described in the festival marketplace definition. The festival marketplace has a feeling of the farmers' market but contains vendors who are not farmers in nature including fast food, apparel and souvenir vendors. The St. Jacobs Market has the greatest variety of goods of the three markets. The market has nearly half of its vendors selling handicrafts, with the highest percentage of merchandise/service vendors and the lowest percentages of meat, fish and dairy goods and homemade and baked goods (Wells & Muncaster, 1992). In addition, the purpose of the festival market is different in that it is more commercially oriented and does not necessarily serve the needs of the agricultural community In terms of the type of vendors at the St. Jacobs Market, 42% were commercially oriented, with 29% home oriented and 12% farm oriented (Wells & Muncaster, 1992). The St Jacobs Market is also run more like a big business as compared to the other two farmers' markets Owned by the Mercedes Corporation, the St. Jacobs Market is part of larger business holding that includes many businesses in the Village of St. Jacobs and also the newly built St Jacobs Factory Outlet Mall. In these ways, the St. Jacobs Farmers' Market can be viewed as a festival marketplace.

On the demand side, the St. Jacobs Market was hypothesized to be a day-trip/recreational periphery market. Many of the patrons at the market were young, with over a third in the 18 to 34 year old group. The St. Jacobs Market had the highest proportion of people that were employed of the three markets suggesting an upward and mobile population coming to the market. The recreational aspect was also important as the market had the highest percentage of patrons travelling with additional people. Also the St Jacobs Market had the highest percentage of patrons bringing two or more additional people to the market

The market was seen by its patrons as more than a shopping trip, as larger groups of friends and family often came for the market experience. The recreational aspect also came out as the St. Jacobs Market had the highest percentage of people coming on a bus tour of the three markets. The travelling times of the patrons was also significant as the market had the highest percentage overall and individually of patrons travelling over 46 minutes to come to the market. To support this, the FSAs were spread fairly equally over the local and regional areas suggesting a rather large trade area. Spending patterns indicated that there were a greater percentage of patrons spending over $76 and also a less than average percentage spending under $10, suggesting a greater amount of money spent at the market.

The length of the stay at the St. Jacobs Market defined the leisure and recreation character of the market. There were very few people staying at the St. Jacobs Market for under 46 minutes, with a majority (84%) staying longer than 46 minutes. The St. Jacobs Market had many patrons staying longer than 121 minutes, while both the Waterloo and Kitchener Markets had very few if any. In terms of businesses visited after the market, the St. Jacobs Market had a very large percentage of its patrons travelling to the village of St. Jacobs as compared to the other two markets. As the Village of St. Jacobs is a day-trip tourist destination for many people, the whole tourism and recreation aspect of the market is extended to the businesses visited after the market.

The answers associated with the question, "Why do you shop at farmers' markets?", resulted in a different proportion of responses as compared with the other two markets. Freshness and quality was not as an important reason for shopping as were the food, crafts and baked goods. The popularity of this answer would suggest a different clientele, again oriented toward the leisure and recreational side.

The type of experience the patrons experienced at the St. Jacobs Market was also significant as the recreational experience accounted for a higher percentage of the responses than the other two markets and the shopping experience had a lower percentage from the other two markets. This would suggest that the St. Jacobs Market is primarily a day-trip recreational market, attracting patrons from a variety of areas, both near and far and offering a wide variety of goods.

5.4.3 The Kitchener Farmers' Market

From the definitions of Neuwirth (1990), the Kitchener Farmers' Market was determined to be a public market on the supply side. This definition was obtained after examining the market internally, including the mixture of vendors. One feature of the public market that was evident at the Kitchener Farmers' Market was the market's main focus on the needs of the public rather than the farmers themselves. Being in a downtown location, the market is setup to serve the urban public rather than the local farmers who might be served by a more local, rural market or by other means. In addition, a public market sells similar goods as the farmers' market, but deals only with the retail public. This statement is mostly true at the Kitchener Market with a main base of patrons being the general public, and other commercial-based customers including local restaurants. However, this commercial aspect is relatively small when compared to the whole customer base. Besides farmers' goods and produce, the public market also sells baked goods, crafts, meat and other items that expand the farmers' markets original domain of fruit and vegetables. From a 1992 survey of the vendor products at the Kitchener Market, handicrafts had the greatest vendor share at 38%, with meat, fish and dairy at 17%, homemade and homebaked goods at 16%, fruit and vegetables at 15% and merchandise and services at 8% (City of Kitchener, 1992) In this way, the Kitchener Market has a wide variety of goods with only a small (15%) fruit and vegetable component. In many cases, the public market is publicly owned by a city and operated by a manager that works for the city. The Kitchener Farmers' Market has a market manager hired under the Parks and Recreation Department for the City of Kitchener As it can be seen with the Kitchener Farmers' Market, there are many supply side characteristics that allow it to be categorized as a public market.

On the demand side, the Kitchener Farmers' Market was categorized as a having regular and local patron base, in a downtown market environment. A number of points from the research analysis would allow for the support of this view. In terms of the physical makeup of the patrons at the Kitchener Market, many patrons were older (the largest group being 55 years and older). A third of the patrons came to the market alone, many taking other forms of transportation rather than the car. A majority of patrons travelled less than 10 minutes to the market suggesting a local trade area, with the map of the home forward sortation areas supporting this view. The top three FSAs comprising just under half of the patrons were from the immediate area surrounding the Kitchener Market. There were very few patrons coming from outside the surrounding area of the market. In addition to the local nature of the patrons, a regularity of visits was also evident. Close to two-thirds of the patrons came at least once every two weeks, with close to 50% coming every week.

To emphasize the shopping side of the market as opposed to the leisure side, few people ate at the market, (57.2% occasionally ate or less frequently ate). The Kitchener Market in addition had the lowest percentage of patrons that always ate at the market The shopping experience was again emphasized with the length of shopping trip at the market More people stayed at the Kitchener Market for a shorter period of time than the other two markets. Nearly three-quarters of the patrons were at the Kitchener Market for under an hour, a short time primarily taken up shopping for goods. Conversely, the St. Jacobs Market had 53% of its patrons staying for periods greater than 60 minutes.

In terms of activities before and after the visit to the Kitchener Market, a large majority of the activities took place in Kitchener. A majority of the businesses visited before the market were of a retail/service variety, which would be understandable as the Kitchener Market is physically attached to a shopping mall and in close proximity to many downtown stores. For places after the market, going home was the most popular followed again by retail shopping. In both the before and after cases, just under 90% of the activities took place in Kitchener, suggesting a very localized market.

Another question that was asked of the patrons regarding their choice in picking the Kitchener Farmers' Market. Close to two-thirds of the customers mentioned proximity as their key reason for choosing the market. As many customers depended on walking or taking the bus to the market, they enjoyed the centrality of the market in its downtown location In addition, other people enjoyed the convenience of having a market in a centralized position, close to other shopping activities, or close to their place of residence. Finally, the Kitchener Farmers' Market had the greatest percentage of patrons that thought the market was primarily a shopping experience and the lowest percentage that thought it was a recreational experience. With all of these point in mind, the Kitchener Market can be considered a public market on the supply side and also having a customer base that is regular and local, in a downtown environment on the demand side.

5.5 Comments From Patrons

Patrons at the Waterloo Farmers' Market had a number of positive and negative comments to make. Comments of the patrons were tabulated at the end of the survey as seen in Appendix A. Customers at the Waterloo Market considered it excellent, original, friendly and unique in character. Problems mentioned were cleanliness, improvements in parking, more room inside, and a needed public transit system to the market. Customers recognized the traditional and unique aspects of the market, again supporting the idea of the Waterloo Market being a true farmers' market.

Patrons found the St. Jacobs Farmers' Market a favourite spot that they liked to show to friends from out of town. Also, customers mentioned their enjoyment of the ethnic atmosphere, special events and the fresh smells as attracting forces to the market. Other patrons found problems with the market including the "farm" smells from the adjoining stockyards and a need for higher quality products and more crafts. The comment regarding the crafts was interesting as the market had the highest percentage of crafts of all the local markets. In this case, customers recognized the tourist and special event aspects of the market, supporting the idea of the St. Jacobs Market as a festival marketplace.

The Kitchener Farmers' Market had customers that enjoyed different aspects of the market including friendly people, wonderful, best place, convenient, lots of variety, good hours, clean, modern and nice atmosphere. In addition other improvements were suggested for the market included longer hours, too commercial, lack of Mennonite participation, stuffy and smoky, and more parking. In this case, patrons recognized the market to be convenient in a downtown atmosphere, which supports the idea of the Kitchener Market being a public market.

5.6 Conclusions From the Literature

Different researchers have contributed to study of farmers' markets and customers in these retail environments. The research by Berry (1967), Sack (1992) and Jones and Simmons (1993) demonstrated that specialized retail environments were a part of the retail system with farmers' markets fitting into the special product areas of this growing environment. Consumers were not only looking to routinely shop, but also to absorb the external and internal qualities of the environment which was also being consumed. Tauber (1972) examined patrons reasons for shopping and found that they were not always economically tied. He also found that shopping was not only a routine experience but also a form of recreation. This recreational aspect was found especially with the St. Jacobs Market in this study. Hoggart (1978) also examined consumers' shopping behaviours and classified them into different shopper types, while McCarthy (1980) described factors that influenced shopping behaviour. These behaviours and factors came out in the current study as different types of consumers differentiated and chose to shop at the different local markets

In addition to the broad environmental and behaviourial literature, different studies were examined that looked at farmers' markets directly. The Lansing (1969), Pike Place (1981) and Hamilton (1988) farmers' market studies examined farmers' markets and their customers at different markets in both Canada and the United States. In addition, local studies were also examined including Rawls (1965), Hayes (1976), Zundel (1982), Coriolis (1987), and Scriver (1990) that enabled a historical comparison with the current study. The various farmers' market studies were valuable by providing a basis and a method of improvement for the current study.

5.7 Contributions and Future Research

The research presented herein has provided a number of contributions. The research has allowed for a greater understanding of farmers' markets in Kitchener-Waterloo and the customers that patronize these markets. Although located geographically in the same market region, each market offers something different to its patrons. Patrons at the individual markets were able to distinguish the differences and nuances of the markets based on their own personal needs, perceptions and attitudes. It was interesting to find that the demand side characteristics were directly relational to the supply side characteristics. For example, the farmers' market that provided a wide array of goods and a "festival" type atmosphere attracted recreational shoppers from further distances willing to experience a novel event. The downtown public market appealed to the regular shoppers who came from the local area as it was centrally located in Kitchener. Also, the "true" farmers' market attracted local and young people who wanted fresh local goods from area vendors. The study was important in examining a specialized retail environment such as the farmers' market and finding that different types of markets exist, including different types of patrons that shop at these different markets.

For the future, a number of things could be added to broaden the scope of this thesis. A new dimension could be taken to expand the time frame of the study. As the data was collected in November, it provides only a snapshot of the people at the markets for that time of the year. Data could be collected at other times of the year to see if differences occur during the different seasons.

In addition, an expansion of the study could be performed in wider geographic area.

As the study focused on one region in South-western Ontario, the farmers' market study could be expanded to take in other geographic areas in Ontario, outside of the province, or even North America. It would be interesting to test to see if the three market types on the supply and demand sides could be duplicated for other farmers' markets.

Also, a greater statistical analysis could be performed on the data. More crosstabulations could be performed between different variables instead of just one variable and the individual market variable. This would add the dimension of refining the data into different groups, that could be used to better explain customer patterns between markets.

5.8 Final Conclusions

A number of conclusions can be made after examining the hypotheses stated in Chapter 2 and reproduced below in Table 5.7.

Table 5.7 - Hypothesized Characteristics of the Farmers' Markets in Kitchener-Waterloo

Market	Supply Side Category	Demand Side Category
Waterloo	Farmers' market	Contemporary/functional urban-fringe market
St. Jacobs	Festival marketplace	Day-trip/recreational periphery market
Kitchener	Public market	Regular/local downtown market

Sources: Neuwirth (1990), the Author

As it can be seen, all three farmers' markets in Kitchener-Waterloo differ from each other on both the supply and demand sides. The Waterloo Farmers' Market has been shown to be a true farmers' market on the supply side, by offering a number of farm products locally grown. The market was also shown to be a contemporary, functional urban-fringe market It served a young and highly educated contemporary customer base that have made the Waterloo Market become a vital and growing market.

The St. Jacobs Farmers' Market is also a unique market in this area. It has been shown that the market is a festival marketplace on its supply side, by offering patrons a wide variety of goods in an environment that stresses a rural and farm-like atmosphere The market was also shown to be a day trip, recreational periphery market by attracting customers from great distances who are interested in the leisurely and recreational aspects that a large diverse market can offer.

The Kitchener Farmers' Market, which celebrates its 125th anniversary in the area this year, is also quite unique. On the supply side, the Kitchener Market is considered a public market, serving the needs of the general public, owned by the public through the city in a downtown location. The market is also considered a regular, local downtown market by attracting a loyal, and local customer base, concerned about proximity.

Farmers' markets in order to be successful in the future, have to be matched in terms of their supply and demand side characteristics. The Waterloo County Farmers' Market has been consistent in the past by offering basic farmers' market goods to a customer base that know the quality of a true farmers market and are not attracted to the glitz and gimmicks of other markets. The St. Jacobs Farmers' Market is gradually moving away from its original roots as a stockyard and food market to a more commercial, destination-oriented place; especially with the addition of the new St. Jacobs Factory Outlet Mall. The Kitchener Market has also changed over the years, from a serving a base of customers from both far and near, to a largely local customer base. With the expansion and growth of the St. Jacobs and Waterloo Farmers Market in the last ten years, more people have been attracted away from the downtown Kitchener Market to the newer and larger periphery markets.

5.9 Future of Farmers' Markets in the Area

The future of farmers' markets in this area is mixed. Two years ago, the Kitchener Farmers' Market was in a real slump, both financially and in image. Different reports have been prepared suggesting ways to improve the market for it to survive in the future Being a downtown market, it must continue to keep and attract local residents who have become mainstay customers in order for it to survive and prosper in the future The St Jacobs Farmers' Market is currently enjoying a prosperous time, attracting a wide crowd of both tourists (day-trip recreational people) and locals alike. Marketing St Jacobs as a destination, the market plays a key role in offering a bit of local tradition and heritage, albeit somewhat contrived, to people interesting in experiencing the area. The commerciality of the market will probably continue to grow as it is adjacent to the St. Jacobs Factory Outlet Mall It is unclear however how many additional activities the general area can absorb before a level of saturation becomes evident. The Waterloo County Farmers' Market originally moved to periphery or countryside to escape the pressures and crowding involved with a downtown urban market. In the beginning the market was successful in accomplishing this However, as the neighbouring St. Jacobs Market grew in size and numbers of people, the area started to resemble the crowded downtown area that was left behind. In the future, the Waterloo County Market may choose to move again, to preserve the local atmosphere and customers that wanted to escape the increased crowding and bustle resulting from outsiders discovering or rediscovering the area. Whatever the results of the three markets in the future, farmers' markets will continue to play a key role in the retail system by offering goods and products that are unique and different from the typical consumer items found in grocery stores and shopping malls.

Appendix A

Farmers' Market Customer Questionnaire

Farmers' Market Customer Questionnaire

Please circle the number or write the correct response in the space provided.

Survey #: _______ Market: 1. St. Jacobs 2. Waterloo 3. Kitchener
Interviewer: _______ (number) Time: __ __ : __ __

1. Is the respondent Male or Female (observe) 1. Male 2 Female

2. Did you come to the market alone? 1. Yes 2. No
   If **No**: (a) How many came with you? 1 2 3 4 5 6 **More**
   (b) Are they: 1. Family 2. Friends 3. Tour Group 4. Other ___________

3. How did you travel?
   1. Car 2. Bus Tour 3. Bike 4. Horse & Buggy 5. Walk 6. Other ___________

4. How long did it take to get here? _______ (number in MINUTES)

5. What are the first 3 digits of your POSTAL CODE? (Example: N2L) ___________

6. What are the first 3 digits of your PHONE NUMBER? (Example: 725) ___________

7. How often do you come to the market?
   1. Twice a week 2. Once a week 3. Once every 2 weeks 4. Once a month
   5. Once every 3 months 6. Twice a year 7. Once a year 8. Once every few years
   9. First time (Go to question 14)

8. How much do you spend per visit at the market on average? $ ___________ (number or range)

9. In general, what percentage of your monthly food budget is spent at the market? _______ %

10. What type of products do you usually buy at the market? (circle as many as appropriate)
    1. Meat/Fish/Poultry 2. Dairy/Eggs 3. Fruit/Vegetables 4. Baked Goods 5. Homemade Foods
    6. Handicrafts 7. Clothing (Soft Goods) 8. Household (Hard Goods) 9. Other ___________

11. How often do you have something to eat or drink at the market?
    1. Always 2. Often 3. Sometimes 4. Rarely 5. Just today 6. Never

12. What time do you usually arrive at the market? ___________ (time)

13. How long on average do you stay at the market on average, in minutes? ________ (number)

14. Did you visit another store/business before you came to the market today? 1. Yes 2. No
    If Yes: (a) How many store(s)/business(es) did you visit? ______ (number)
    (b) What were the business(es) that you visited before the market?
    1. Grocery 2. Restaurant 3. Convenience Store 4. Specialty Store
    5. Farmers' Market 6. Other ___________________
    (c) Where were these business(es) located? ___________________________

15. What are the 2 most important reasons why you go to farmers' markets?

____

____

16. For what reasons did you choose this market over another farmers' market in the area?

____

____

17. If you could change anything about this market, what would you change?

____

____

18. Is the farmers market primarily a recreational experience, a shopping experience or both for you? 1. Recreational 2. Shopping 3. Both

19. What type of impact on the market do you feel the new outlet mall being built adjacent to the St. Jacobs Farmers' Market will have? Do you think it will be:
 1. Positive 2. Negative 3. Not Sure 4. No Response

20. Where do you plan to go after your visit to the market?
 1. Home 2. Retail Shopping 3. Grocery Shopping
 4. Recreation 5. Farmers' Market 6. Other ________
 If 2, 3, 4, 5 or 6 : (a) Where is this activity located? (Town/City) ________

21. What age category do you belong to? (read list)
 1. 18-34 2. 35-44 3. 45-54 4. 55 +

22. What is your education level?
 1. Less than high school 2. High school 3. Some College/University
 4. College 5. University

23. What is your employment status?
 1. Employed 2. Unemployed 3. Student 4. Retired 5. Homemaker 6. Other ________

24. Are there any comments you would like to add regarding this survey or this farmers' market?

____

____

____

Research Assistant Comments (if any).

____

Appendix B

Letter of Reference

Wilfrid Laurier
University

Founded 1911

November, 1993

Dear Farmers' Market Shopper:

Dana Wells is working for a Masters degree in Geography at Wilfrid Laurier University and I am supervising his research. His Masters thesis is a study of Farmers' Markets in Kitchener-Waterloo, examining who shops at farmers' markets and why, the economic impact of farmers' markets, and how this fits in with customers' overall grocery shopping patterns. To complete this study, Dana and his research assistants need to interview market customers.

The purpose of this letter is to introduce Dana Wells and his research assistants and to request your participation in a brief interview. Permission to conduct the survey has been granted by this farmers' market. All responses will be confidential and you may omit any questions you do not wish to answer.

Your participation in this research project will be greatly appreciated.

Yours truly,

Dr. Russell Muncaster
Professor of Geography

Appendix C

Summary Statistics for the Farmers' Markets

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Questions	Classifications	All Markets	Waterloo Market	St. Jacobs Market	Kitchener Market
Time of Survey Taken During the Day	Early (7:00-8:59 am)	21.4%	10.4%	23.6%	30.5%
	Middle (9:00-10:59 am)	43.5%	44.5%	47.7%	38.0%
	Late (11:00-1:00 pm)	35.1%	45.0%	28.7%	31.5%
Gender of the Patrons	Males	47.7%	52.6%	42.6%	48.0%
	Females	52.3%	47.4%	57.4%	52.0%
Ages of the Patrons	18-34 years	31.6%	35.6%	36.2%	22.7%
	35-44 years	22.3%	26.0%	25.8%	14.6%
	45-54 years	22.0%	16.3%	24.9%	24.7%
	55+ years	24.1%	22.1%	13.1%	37.9%
Education Level of Patrons	< High school	6.6%	6.7%	3.3%	10.0%
	High school	32.4%	28.4%	33.3%	35.5%
	Some post second.	14.8%	9.6%	13.6%	21.5%
	College	14.5%	14.9%	18.8%	9.5%
	University	31.7%	40.4%	31.0%	23.5%
Employment Characteristics of Patrons	Employed	66.5%	64.0%	78.6%	56.0%
	Retired	16.5%	15.6%	8.4%	26.0%
	Student	8.8%	12.3%	8.4%	5.5%
	Unemployed	4.2%	3.8%	2.8%	6.0%
	Homemaker	4.2%	4.3%	1.9%	6.5%
Come Alone to the Farmers' Market?	Alone	29.1%	27.5%	15.8%	44.0%
	Not Alone	70.9%	72.5%	84.2%	56.0%
Number of Addition People that Come to the Farmers' Market	Alone	29.1%	27.5%	15.8%	44.0%
	1 Person	35.4%	42.3%	33.3%	30.2%
	2 People	16.7%	13.0%	26.3%	14.6%
	3 People	6.4%	7.7%	8.1%	4.5%
	4+ People	12.7%	9.5%	16.5%	6.7%
People Characteristics that Come Along	Family	69.2%	69.0%	63.5%	75.2%
	Friends	27.4%	29.7%	32.8%	19.7%
	Tours	3.4%	1.3%	3.7%	5.1%
Mode of Travel to the Market	Car	88.0%	98.1%	94.9%	70.0%
	Walk	6.2%	0.5%	0.0%	19.0%
	Bus Tour	3.5%	1.4%	5.1%	4.0%
	City Bus	2.2%	0.0%	0.0%	7.0%
Length of Drive to Farmers' Market in Minutes	0 - 5 minutes	13.0%	11.4%	7.4%	20.5%
	6-10 minutes	19.0%	18.1%	12.6%	27.0%
	11-15 minutes	18.6%	21.0%	19.5%	15.0%
	16-20 minutes	11.0%	10.5%	12.6%	10.0%
	21-45 minutes	15.5%	18.1%	18.5%	9.5%
	> 46 minutes	22.9%	21.0%	29.3%	18.0%

Questions	Classifications	All Markets	Waterloo Market	St. Jacobs Market	Kitchener Market
Highest Percentages of First 3 digits of Postal Codes for Areas Patrons Came From	Forward Sortation Areas (FSAs)	10.7% N2L 8.8% N2H 7.1% N2M 5.7% N0B 5.7% N2G 5.3% N2J 3.2% N2A	18.1% N2L 9.5% N0B 7.6% N2J 4.8% N2M 3.8% N2E 3.8% N2H	9.9% N2L 5.6% N2H 5.2% N0B 5.2% N2J 4.2% N2M 2.8% N0G 2.8% N1H 2.8% N2E	17.5% N2H 13.4% N2G 12.9% N2M 4.1% N2B 3.6% N2L 3.1% N2J
Areas Where Patrons Came From	Waterloo Kitchener Regional Outside of Region	19.3% 35.6% 12.0% 33.2%	30.8% 26.1% 13.3% 29.9%	17.6% 24.1% 16.2% 42.1%	9.0% 58.0% 6.0% 27.0%
How Often Patrons Come to the Farmers' Market	Regularly Once a week or more Every 2 weeks Once a month Once every 3 months Twice a year Once a year First time/every few years	46.7% 30.9% 15.8% 13.9% 12.5% 11.4% 5.1% 10.4%	44.5% 26.5% 18.0% 18.0% 18.0% 9.0% 4.3% 6.2%	34.0% 19.6% 14.4% 15.8% 10.7% 16.3% 7.4% 15.8%	62.8% 47.7% 15.1% 7.5% 8.5% 8.5% 3.5% 9.0%
Money Spent at the Farmers' Market for the Particular Day	> $10 $11-$25 $26-$50 $51-$75 > $76	11.7% 33.2% 38.8% 6.2% 10.1%	13.5% 31.0% 39.0% 8.0% 8.5%	8.8% 32.0% 39.8% 6.6% 12.7%	12.6% 36.6% 37.7% 3.8% 9.3%
Percentage of Monthly Food Budget Spent at the Farmers' Market	1-5% 6-10% 11-20% 21-30% 31-40% 41-50% 51+%	15.4% 21.1% 16.1% 20.7% 8.7% 11.4% 6.7%	19.3% 23.7% 13.2% 20.2% 7.0% 10.5% 6.1%	10.0% 20.0% 18.9% 24.4% 2.2% 16.7% 7.8%	15.8% 18.9% 16.8% 17.9% 16.8% 7.4% 6.3%
Goods Purchased During Visit to the Market	Meat/Fish/Poultry Fruit/Vegetables Baked Goods Dairy/Eggs Handicrafts Homemade Goods Other	29.3% 27.8% 16.8% 11.3% 6.0% 5.4% 3.4%	29.2% 28.8% 19.9% 9.5% 5.1% 5.1% 2.1%	28.2% 26.3% 15.2% 9.0% 9.8% 5.6% 5.9%	30.4% 28.4% 15.3% 15.3% 3.2% 5.4% 2.0%
Do You Eat at the Market?	Always/Often Eat Never Eat Rarely Eat Occasionally Eat	54.6% 19.6% 15.1% 10.6%	49.5% 20.8% 21.3% 8.4%	72.2% 7.0% 10.2% 10.7%	42.8% 31.0% 13.4% 12.8%

Questions	Classifications	All Markets	Waterloo Market	St. Jacobs Market	Kitchener Market
Time Usually Arrived at the Market	6:00-6:59	2.7%	3.0%	3.2%	1.6%
	7:00-7:59	17.5%	13.4%	25.1%	14.5%
	8:00-8:59	20.2%	16.9%	20.8%	23.1%
	9:00-9:59	26.3%	26.4%	27.9%	24.7%
	10:00-10:59	19.6%	22.4%	11.5%	24.7%
	11:00-11:59	10.4%	13.4%	7.7%	9.7%
	12:00-12:59	3.2%	4.5%	3.3%	1.6%
Length of Stay at the Market	15-30 minutes	18.8%	20.1%	9.2%	26.9%
	31-45 minutes	7.5%	9.5%	3.8%	9.1%
	46-60 minutes	36.3%	38.7%	30.8%	39.2%
	61-75 minutes	1.9%	0.0%	3.2%	2.7%
	76-90 minutes	9.8%	12.6%	11.9%	4.8%
	91-120 minutes	16.1%	11.6%	26.5%	10.8%
	120+ minutes	9.5%	7.5%	14.6%	6.5%
# of Businesses Visited Before Market	1 Business	84.8%	77.5%	92.3%	87.9%
	2 Businesses	13.1%	20.0%	7.7%	9.1%
Parton Activities Before Coming to Market	Retail/Service	46.9%	50.0%	30.8%	56.3%
	Other Farmers' Market	18.8%	28.9%	26.9%	0.0%
	Restaurant	20.8%	15.8%	7.7%	37.5%
	Grocery Store	8.3%	5.3%	15.4%	6.3%
	Visit People	5.2%	0.0%	19.2%	0.0%
Places Where Businesses Were Located Before Market	Waterloo	45.7%	69.4%	65.4%	3.1%
	Kitchener	42.6%	13.9%	26.9%	87.5%
	St. Jacobs	7.4%	13.9%	3.8%	3.1%
	Other	4.3%	2.8%	3.8%	6.3%
What Do Patrons Do After Coming to the Market?	Home	49.2%	48.8%	54.0%	44.5%
	Retail Shop	23.2%	22.7%	22.8%	24.0%
	Grocery Store	8.0%	9.0%	6.0%	9.0%
	Another Farmers' Market	4.6%	9.5%	1.4%	3.0%
	Restaurant	4.3%	3.8%	4.7%	4.5%
	Recreation	3.7%	0.9%	4.2%	6.0%
	Family/Friends	2.4%	3.3%	1.9%	2.0%
	Work	1.8%	0.9%	2.8%	1.5%
	Other	2.9%	0.9%	2.3%	5.5%
Where is Activity Located After the Market	Waterloo	34.4%	55.9%	42.0%	6.2%
	Kitchener	45.9%	23.5%	23.2%	85.6%
	St. Jacobs	11.2%	9.8%	27.5%	7.2%
	Other	8.5%	10.8%	7.3%	1.0%
Why Shop at Farmers' Markets?	Freshness/Quality	29.2%	32.6%	19.3%	35.8%
	Atmosphere/People	19.5%	17.6%	18.4%	22.6%
	Food/Crafts/Baked	17.9%	17.6%	21.7%	14.4%
	Outing/Tradition	10.8%	7.6%	0.4%	7.3%
	Variety/Specialities	9.3%	9.3%	10.4%	8.3%
	Price	8.6%	11.0%	8.3%	6.1%
	Other	4.7%	4.3%	4.4%	5.5%

Questions	Classifications	All Markets	Waterloo Market	St. Jacobs Market	Kitchener Market
Why Did You Pick This Particular Farmers' Market?	Proximity	31.1%	18.5%	18.1%	60.6%
	Tradition/Loyalty	14.5%	16.7%	16.0%	10.3%
	Best/Favourite	10.6%	14.5%	13.5%	3.0%
	Crowding/Accessibility	9.1%	5.3%	12.2%	5.4%
	Variety/Selection	9.0%	11.5%	13.9%	0.5%
	Knowledge/Vendors	7.6%	11.0%	6.8%	4.9%
	Parking	4.0%	4.3%	5.0%	1.6%
	Go to Other Markets	5.0%	5.4%	10.4%	1.1%
	Other	9.1%	12.8%	1.1%	12.6%
Would You Change Anything About this Farmers' Market?	Nothing	39.5%	29.3%	35.8%	53.3%
	Bigger/Space	10.9%	12.0%	12.3%	8.3%
	More Parking/Paved	10.6%	12.6%	8.0%	11.7%
	Less Crowds	8.2%	7.8%	15.6%	0.0%
	More Variety	6.3%	6.0%	5.7%	7.2%
	Warmer/Sheltered	7.2%	10.2%	9.0%	2.2%
	Times/Hours Open	2.9%	1.8%	0.0%	5.6%
	Less Commercial	2.3%	1.8%	2.4%	2.8%
	Other	12.1%	18.5%	11.2%	8.9%
Type of Experience at Farmers' Market	Both Types	58.4%	65.1%	59.5%	51.0%
	Shopping	28.0%	24.9%	20.5%	39.5%
	Recreational	13.3%	10.0%	20.0%	9.5%

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