

MADISON PUBLIC MARKET BUSINESS PLAN

Phase 1 Report

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Introduction

For over ten years the City of Madison has been studying the feasibility of creating a public market which would showcase the region's food offerings. Most recently, the City has expressed a desire for this public market to be a thriving and bustling center of activity for the region's food system: a district that features food retail sales, prepared food sales, wholesale operations, aggregation/distribution, and food processing. In addition, the vision of this public market is that it serves the local population and provides Madison area residents with access to fresh, affordable, locally-produced food all within a unique destination that can become an extraordinary public space for the City of Madison.

When Project for Public Spaces (PPS) was retained to develop a business plan for this public market project, we proposed that we split our work into three phases, focusing initially on an analysis of the region's food system, tenant/vendor outreach and cultivation, and community outreach and market assessment. The Madison Public Market Business Plan Phase 1 Report is based on this extensive research and was developed to address the following core questions and enable the City and the Local Food Committee to make a "go/no go" decision about taking this project to the next step:

- What does Madison's food system need? Is there opportunity for agglomerating different uses?
- Is there sufficient market capacity to ensure the project's economic sustainability? What is the level of interest and the capacity from the different user groups? Which groups are interested in working together?
- What type of public market should be pursued for further consideration?

Our approach to this study focuses on the three core ingredients of public markets: Product, People, and Place. This first phase and report focuses on the first two – Products and People – but describes some of the Place implications of our work on a potential public market for the City of Madison.

Methodology

To better understand Madison and the surrounding region's food system as it is today, as well as its potential, PPS completed a number of tasks including extensive outreach to the region's agricultural and food experts as well as City residents. The City of Madison's Local Food Committee has a deep and wide ranging mix of expertise in the existing food assets in the Madison region and the PPS team conducted extensive interviews with members of the Committee as well as other food system stakeholders (a complete list of organizations can be found in Appendix A). This task gave us a greater understanding of the activities and efforts

already underway in the City and region, such as the newly open FEED Kitchen and the Wisconsin Food Hub. These interviews also helped inform us of what some think is missing, and how the potential public market could provide new opportunities to the region's farmers, food producers, etc. to scale up and target a new customer base. Our analysis of this research helped us understand that there are a lot of food-related endeavors underway, but that there also is great interest and a great pool of vendors to potentially cultivate more related food activity in the City. This base of knowledge has been and will continue to be utilized in the analysis of how the public market could contribute.

The process for developing the Phase 1 Report included gathering public input as well. In October 2013, the Local Food Committee, the City of Madison and PPS hosted an open house that was attended by over 50 community members. We were able to introduce participants to the project and how we intend to complete our work for the City, but more importantly, we were able to hear directly from the public on what their hopes and wishes, as well as issues and concerns, were for a public market in Madison (input from the open house can be found in Appendix B). Their input set the stage for how we approached this phase of the project. From the public we understood that this potential public market should be a multi-functional public gathering place that features not only local food, but space for music, cooking classes and demonstrations, arts/crafts, and other educational opportunities. We also heard that Madison's current farmers markets are beloved and that this potential market should complement, not compete, with other storied institutions, such as the Dane County Farmers Market. Above all else we learned from the public that this potential market needs to be welcoming to all - in location, product offerings, and price.

A public market is only as good as its vendors so during the first phase we reached out to potential tenants/producers in the region through focus groups, another public open house explicitly for potential vendors (input from the vendor open house can be found in Appendix C), and an online survey (the final survey can be found in Appendix D and results from the survey in Appendix E). Their input greatly informed the *Products* section of our report and showed us that despite the many wonderful marketing opportunities in the Madison region, there is still great interest in this potential market project.

To better understand the Madison customer base and their satisfaction with the region's current food offerings, our team hosted two focus groups with Madison area residents, completed and analyzed a Consumer Survey sent to a panel of 385 randomly selected paid Madison-area participants ("Panel Survey"), and analyzed a similar Public Consumer Survey ("Public Survey") facilitated by the City, completed voluntarily by 2,211 people. Both of these surveys serve a purpose and provide different perspectives on the Madison consumer. While the "Public" survey is likely more representative of the people who are most apt to be core public market consumers, the "Panel" survey is perhaps a better reflection of the general public

and provides insight into the food buying habits of the average Madisonian. Finally, we completed a Huff Gravity Model of the City of Madison to understand the drawing power of existing Madison food stores; we will use this model in Phase II to estimate site potential (the Madison Public Market Market Analysis can be found in Appendix F).

Key Conclusions

Overall, the results of the research efforts conducted in Phase 1 of the Madison Public Market Business Plan were very positive, and the response by many potential vendors and customers was very enthusiastic. The discussions with vendors and the vendor survey revealed a sizable untapped demand for direct-to-consumer sales opportunities among farmers, small businesses, and others. The consumer analysis, particularly the high-level of response to the Public Survey, highlighted the extraordinarily high level of interest among community members. The sheer number of participants in the process so far (both among vendors and consumers), the thoughtful comments that were provide, and the widespread support for the idea of a Madison Public Market has provided valuable data and information that will be used as PPS, the City staff and elected leaders, and the Local Food Committee move forward with business plan.

Moving ahead, one of the fundamental challenges of the project will be designing the public market in a way that complements and amplifies the numerous other related projects, businesses, and traditions in Madison. The public market district's function as the epicenter of Madison's already robust local food culture and economy should not be underestimated. Due to their temporary nature, current farmers markets are ephemeral and other outlets for local food and support facilities for businesses are dispersed throughout the community. While it is not practical to attempt to physically cluster all of these uses, it is possible for the public market, if developed as a market district – with the right mix, form, and location – to boost the identity of the local and regional food systems in Madison and the greater Madison area.

Looking forward to the next phases of the Business Plan (site selection followed by design, operations, and financing), the tasks ahead will be to carefully select a location and design the market in a way that positions it for long term viability. If the project is successful, the public market has the potential to add to Madison's existing food traditions like the City's beloved farmers markets, create an extraordinary public space for the community with a unique mix of offerings, and build on Madison's reputation as a city that values the connections between food and community.

Products

Understanding what is sold and produced, as well as who is selling and producing, is vital to determining what this market has the potential to become for Madison. There are great strengths in the region and also several challenges to developing the right vendor and product mix. The strengths and challenges both inform the opportunities that are available to this potential market.

Strengths

- **There is a history and strong base of food-related employment in Madison.** About 31,772 people in Dane County (County Business Patterns 2011) are employed in the food business, agricultural businesses, manufacturing, wholesaling, retail, and food service.
- **The City of Madison is a local food Mecca that pervades the food economy.** This is seen most clearly through the number of [Community Supported Agriculture program \(CSAs\) drop off sites](#)¹ in the City and the strength of [farmers markets](#)², from the country's largest - the Dane County Farmers Market - to smaller, neighborhood markets which operate every day of the week throughout the City during peak season. The prevalence of local food, however, is not exclusive to markets and CSA's. Customers can also find locally grown and produced foods at most of the City's grocery and specialty food stores, whose importance is apparent through marketing programs, such as Metcalfe's food miles signage. This is a dynamic and growing movement.
- **From our assessment of the regional food economy, there are many assets that can be drawn upon in the development of a public market:**
 - **The region's food businesses are doing well:** 80% (68 out of 84) of vendor survey respondents reported that their sales have increased in the last five years.
 - **The region has many established food businesses:** 55% (54 out of 98) of the regional food business owners who completed the survey have been in business at least five years.
 - **The area's food businesses are experienced retail and wholesale marketers:** 64% (52 out of 81) of the regional food business owners who completed the survey currently sell at farmers markets; 53% (43 out of 81) currently sell

¹ Fair Share CSA Coalition Farm Pick Up Location Map: <http://www.csacoalition.org/our-farms/pickup-locations-map/>

² City of Madison List of Farmers Markets: <http://www.cityofmadison.com/live-work/neighborhoods/farmers-markets>

wholesale directly to a grocery store or other food store; and 38% (31 out of 81) currently sell wholesale directly to restaurants.

- **Many regional food businesses' sales already reach beyond Madison, and even southern Wisconsin:** 49% (41 out of 81) of business owners who completed the survey sell via the Internet.
- **There is a strong base of permanent fresh and prepared food vendors interested in the market to expand their retail opportunities.** The number of attendees at the vendor focus groups and open houses revealed a high level of interest and enthusiasm among potential public market vendors. This is supported by data from the vendor survey which showed that 82% (75 out of 92) of survey respondents are, “interested to very interested” in locating or doing business at a public market in Madison.
- **In the next five years, many regional food business owners plan on expanding their year-round retail marketing opportunities.** Out of 77 survey respondents, 64% (49) envision selling at more year-round farmers markets and 26% (20) envision opening their own retail storefront or similar facility.
- **There continues to emerge a large pool of start-up food businesses and farmers who still are looking for more direct-to-consumer retail opportunities in Madison.** Based on individual interviews and the vendor focus groups, we understand that there are vendors who are not currently able to sell at the Dane County Farmers Market due to a waiting list and/or the unique rules of the farmers market. A public market could provide a valuable complementary retail venue that serves this vendor pool and in this way, the public market and Dane County Farmers Market can coexist as two distinct vendor opportunities and two different shopping experiences for Madison consumers.
- **There is a rich variety of ancillary uses that can be integrated into a market that will add synergy for which vendor interest was significant.** Over half (52 out of 90) of vendor survey respondents said that it would be very important to the future success of their business if they were located in an active public space. There are a number of complementary retail opportunities to a market (restaurant, brewery, wine bar, coffee shop, CSA pick up etc.) that were suggested throughout our interview and focus group process. While we did not do an exhaustive survey of these types of activities, there appears to be interest in co-location by these types of users. Through individual interviews and focus groups we know that non-profit educational facilities, co-location of food advocacy groups and co-working environments, and art and crafts work/sell space also appear to have significant interest in locating within the potential market.

- **Wholesale, distribution and processing facilities (food hubs) are in their nascent stage.** In addition to more established organizations such as the Fifth Season Cooperative in Viroqua and the Wisconsin Innovation Kitchen in Mineral Point, the Wisconsin Food Hub, established in 2012, is growing their farmer membership and sales. They have also secured a warehouse outside Madison to expand their efforts in 2014. This may create synergistic opportunities for co-location and/or coordination with the Madison Public Market.
- **In the fall of 2013, FEED - a shared-use commercial kitchen designed to grow more local food businesses - opened in Madison.** We have heard anecdotally that it is doing well, although we have not seen any data related to its usage or its financials to date.
- **Interest in ethnic foods is not being well met by the City's grocery stores and markets today.** The City of Madison has a growing minority and ethnic population with 7.3% Black, 7.3% Asian, 7.2% Latino, and 6% other or multi-racial. In fact, since 2000, Madison's Black population has grown by 40.6%, its Asian population by 44.5%, and its Latino population has more than doubled (Scanus, 2014). However, the City's increasing ethnic diversity is not reflected in quality ethnic food stores available to the entire population. Moreover, today the interest in ethnic foods transcends one's own food heritage creating demand for more specialty and ethnic foods.

Challenges

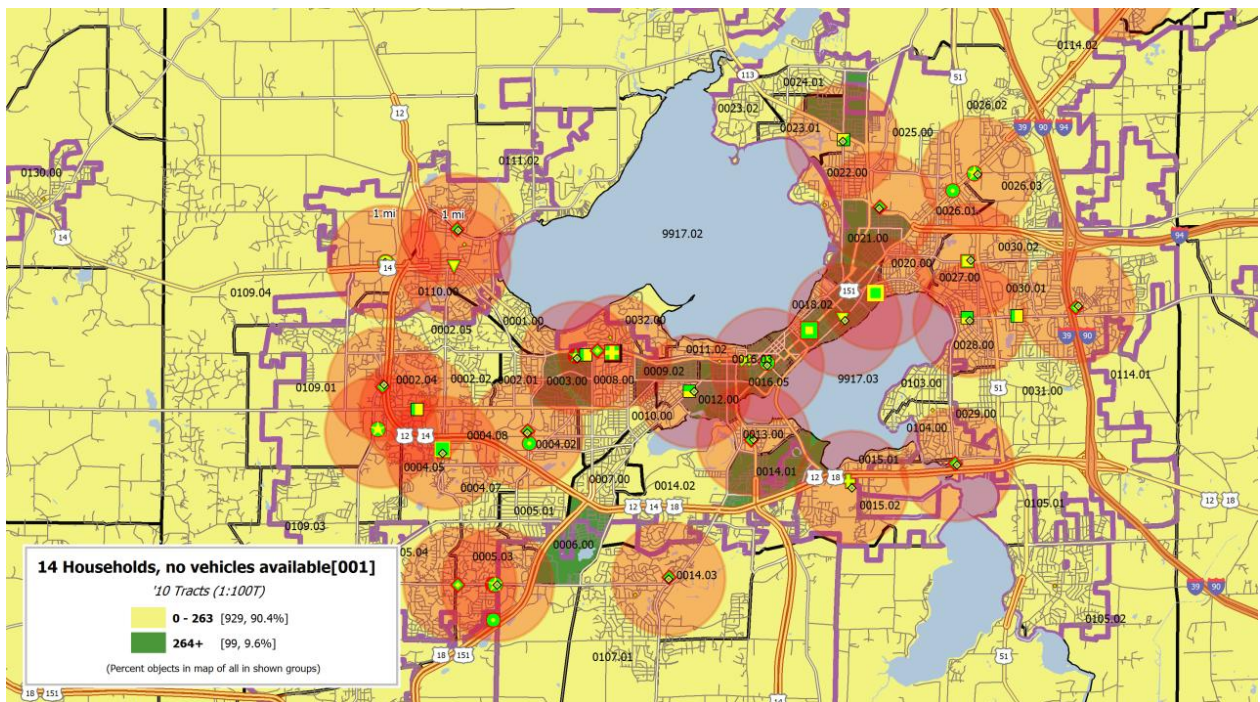
- **Produce offerings at the potential market will mainly be seasonal, and will be weak in the winter unless other distribution outlets are created.** Produce is a major draw for customers to retail food markets/stores, and is often how a customer judges the quality of a retail outlet. Despite the 26 produce farmers who have expressed interest in the potential market, the number of year-round, and even seasonal, regional produce farmers/vendors who responded to the Madison Food Business Survey was low:
 - Seven currently sell produce year-round and 18 currently sell produce seasonally.
 - Within the next five years, 12 reported that they plan on selling produce year-round, and 15 reported that they plan on selling produce seasonally.
- **Many food businesses interested in the public market project are low on capacity and experience:**
 - 21% (20 out of 97) of survey respondents have no employees and 71% (69 out of 97) employ four or fewer employees.

- o 53% (50 out of 94) of survey respondents employ family members to operate their businesses.
- o 62% (46 out of 74) of survey respondents report annual average sales (including wholesale and retail) of less than \$50,000.
- **Interest from regional food businesses in expanding wholesale marketing opportunities is moderate, but this may not reflect the capacity of interest of all regional producers.** Thirty percent (23 out of 77) of survey respondents envision developing the capacity at their farm or business to sell wholesale, and 27% (21 out of 77) envision using a shared aggregation/distribution facility to sell wholesale.
- **Farmer-driven wholesale marketing opportunities, e.g. the Wisconsin Food Hub, are still emerging.** The Wisconsin Food Hub reported moderate sales in 2013, but interest among prospective buyers suggests the potential for increasing sales in 2014 and beyond.
- **Many of the region’s farmers may not be able to expand into wholesale production because they are not Good Agriculture Practice (GAP) certified, nor plan on becoming certified.** This information is based on our interviews with regional food system experts, the vendor focus groups, and the vendor survey which showed that 13% (10 out of 77) of survey respondents plan on becoming GAP certified in the next five years. However, the [USDA recently launched a pilot program](#)³ in five states, including Wisconsin, to help small and mid-sized farmers and ranchers achieve GAP certification. In line with this same challenge, the Federal Food Safety Modernization Act, while not finalized, may prove challenging for non-traditional wholesale marketing entities, of which the potential public market is one.
- **Madison has the ingredients of a successful public market already, but they exist in multiple locations, both for vendors and consumers.** For food businesses, support facilities in Madison include the Wisconsin Food Hub, FEED Commercial Kitchen, and Common Wealth Development’s Madison Enterprise Center and Main Street Industries. The Madison food economy is also very competitive and the consumer is already well served by access to local food products. The Dane County Farmers Markets is a strong destination, neighborhood farmers markets are growing, and CSA membership is high. Finally, many of the City’s food retailers, both local stores and national chains, are sophisticated and realize the importance of featuring local products, i.e. Willy Street Coop and Metcalfe’s.

³ USDA announcement expanding support for small to mid-sized farmers and ranchers: <http://www.usda.gov/wps/portal/usda/usdahome?contentid=2014/03/0036.xml>

- **Concerns were expressed by some potential tenants about a public market:**
 - **A few independent, established food operators, as expressed in the vendor focus groups and survey, are concerned that by participating in a public market they would face “restrictions” on what they would be allowed to sell.** One existing brewer indicated that he might not want to participate in a public market setting because he would not want someone else telling him what he can or cannot sell.
 - **Some potential vendors of the new public market may not be able to participate without leaving the Dane County Farmers Market.** Based on key interviews, and our knowledge of the Dane County Farmers Market Rules and Regulations, members who sell exempt products, e.g. cheese, baked goods, or candy at the farmers market, are not allowed to have another retail location except at their production site. Therefore, unless these rules are changed any Dane County Farmers Market vendor who falls under this rule - and already has a production site elsewhere - will not be able to participate in this potential public market without giving up their location at the current farmers market.
 - **There are laws/restrictions limiting the expansion of beer/wine/spirit production and marketing.** While we did not research this fully, it came to our attention during the vendor focus groups that the State of Wisconsin has some alcohol production/marketing laws or restrictions that might make a brewery/brew pub or something similar, difficult to operate at a potential public market.

- Most Madison residents live within a mile of a food store today.** The official USDA definition of a “Food Desert” is a Census Tract that lacks a supermarket within a 1-mile radius, has over 500 people, and where 10% or more of the population lacks access to a personal vehicle. Though many Madison neighborhoods have food access challenges, the data reveals that the Allied Community is the only part of the City that currently meets the technical definition of a food desert. Regardless of the City’s ultimate decision on the location of the public market, improving food access in this neighborhood should be a priority for policymakers.



Mile radii around Madison food stores show good coverage for most of city.

Opportunities

- Building off of the already established interest from vendors (both experienced and “green”) we believe there is an opportunity to serve food operators who are unable to access existing outlets in Madison, who want to expand their businesses, or who want more locations.** The Madison Public Market can be a food innovation center clustering a variety of core food businesses, but with a focus on retail based on the strong interest in this marketing avenue that has already been expressed from potential vendors. However, this market may also have a production and wholesale component. To minimize risk, and to not rely exclusively on walk-in retail trade, tenants may need to have other sources of income from wholesale, on-site production, another location, etc.

Potential tenants could realistically include:

o *Innovative small food business:*

- Location: temporary or permanent market stall or retail store
- Product: locally grown and/or produced food products (produce, meat, fish, dairy, baked goods, preserves, coffee/tea, chocolate/candy, beer/wine/spirits, spices, ethnic foods and ingredients, etc.)
- Operation: There are a number of ways small food businesses could use this market:
 - Sell directly to customers through a temporary or permanent market stall
 - Operate a retail/wholesale business through a permanent market stall or retail storefront
 - Producer/processors could operate a retail/wholesale business and potentially have their own commercial kitchen on-site (28% of survey respondents said their own commercial kitchen was necessary to grow their business)

o *Farmers:*

- Location: temporary or permanent market stall
- Product: seasonal and year-round Wisconsin-grown products (produce, meat, dairy, grains, flowers/plants, preserves, etc.)
- Operation: There are a number of ways farmers could use this market:
 - Sell directly to customers through a temporary or permanent market stall
 - Aggregate products and sell through knowledgeable vendors
 - The market could serve as a retail outlet for a local food hub, e.g. the Wisconsin Food Hub, to sell excess product when available
 - Through a wholesale tenant, provide cross-docking that would facilitate trucks now coming from Chicago, Minneapolis, and

Milwaukee to return with Madison grown or made products

- Use the site as a drop-off point for a CSA share, staffed with knowledgeable staff
- Sell directly to restaurants/chefs on-site

o *Grocery Store:*

- Location: Permanent retail store
- Product: full line of fresh food items and non-perishables
- Operation: A potential collaboration with a grocery or specialty food store could add to and bolster the product mix of the market, provide the market with produce on a regular basis, and keep the site active throughout the week.

o *Prepared Foods Vendors:*

- Location: food cart, permanent market stall, or retail store
- Product: foods to be eaten on the premises or taken-away for consumption, including ethnic foods.
- Operation: Prepared food tenants could either prepare their food on-site through the use of a commercial kitchen or cooking equipment at their stall, or sell an already prepared item directly to customers.

o *Complementary retail opportunities:*

- Location: retail storefront
- Product: restaurant, brewery, wine bar, coffee shop, etc.
- Operation: The addition of complementary retail stores could add to and bolster the product mix of the market and keep the site active throughout the week.

o *Artists and Crafters:*

- Location: temporary or permanent market stall
- Products: juried, handmade art and crafts
- Operation: There are a number of ways artists and crafters could use this

market:

- A temporary art/craft market could be set up at the market on specific days
- Artists and crafters could rent permanent stalls to sell directly to customers and use as a permanent, on-site workspace

- **There are a wide variety of complementary food-related educational and support uses that have expressed interest in being affiliated and located within the public market.**

This use should continue to be explored since it would add synergy to the market. These types of organizations and activities would probably require affordable rental rates, so they would need to provide a public benefit in order to justify public investment.

Examples of potential tenants include:

- The co-location of food advocacy groups (this was mentioned a number of times during our interviews and focus groups)
- A commercial test/demonstration kitchen for caterers, chefs and food entrepreneurs to test and showcase new dishes and products for the public. Cooking classes could use this space to showcase items from the market and the kitchen could also be rented out for an extra fee to special events/parties. This facility would not duplicate the FEED Kitchen’s role of providing a kitchen for food processing because the goal of the public market’s kitchen would be to provide a public place for on-premise food consumption.
- Non-profit educational facilities
- Co-working facilities, including a food innovation meeting space. In order to support budding entrepreneurs, this space could be developed to allow food entrepreneurs a place to work and meet with marketing professionals, financial experts, lawyers, accountants, and venture capitalists, etc. to help grow their businesses. This space could be developed and operated in partnership with regional organizations that provide business start-up assistance to small food businesses including the Wisconsin Women’s Business Initiative Corporation (WWBIC), Madison College, the University of Wisconsin Small Business Development Center (SBDC), and University of Wisconsin Extension. The City has already begun discussions with these groups about the project. Given the large number of very small businesses that have expressed an interest in the public market, providing “wrap around” business support services that help these entrepreneurs write business plans, access financing, etc. will be important.

- **Wholesale uses at the public market are contingent on location and site:** what may be a good wholesale site may not be a good retail site, and can in fact present a conflict with the retail facility. While the retail and public gathering components should not be compromised to have wholesale, there are still many wholesale opportunities that individual vendors can have in any location. The market, as noted, can also be a retail outlet for the wholesale/food hub – especially in the area of produce. If there is a wholesale food hub on-site, public market management should let an outside distributor or food hub handle the wholesale program for the market (the operations of the Public Market will be addressed in Phase III of the Business Plan.)

People

Strengths

- **There is strong core customer interest in local food** witnessed by the 2,211 people who voluntarily responded to the Public Survey:
 - **Madison boasts an extensive CSA network** with 13% of the Panel Survey and 25% of the Public Survey respondents saying they were a member.
 - **There is high participation rate from of shopping at farmers markets** – 63% of the Panel Survey and 81% of the Public Survey respondents, saying that they had visited the Dane County Farmers Market at least once last year. And Madison has a network of neighborhood markets that was also well attended last year according to our two surveys.
 - **Shoppers at grocery stores showed a strong interest in local foods** with 25% of the Panel Survey respondents and 53% of the Public Survey respondents saying that a good selection of locally grown or produced products greatly influenced where they shop for food.
- **Both survey respondents already shop at a variety of different stores for their food.** Food shopping is very competitive. People shop at different stores for different purposes. Sometimes people select where they shop because it is convenient, or the price is right, or for a variety of other factors. People shop at a variety of places already, sometimes for convenience, sometimes for cost, sometimes for quality. The public market needs to establish itself as one of those choices both as a place to eat and to buy food.
- **There are a growing number of grocery stores in Madison which provide residents a number of shopping alternatives:**
 - Festival Foods announced they are opening a 50,000 square foot store at 800 E. Washington.
 - Possible new stores by Whole Foods and Hy-Vee.
 - Willy Street Co-op recently opened a second store with the potential of a third location.
- **The Saturday Dane County Farmers Market is a popular attraction.** About 63% of the Panel Survey and 81% of the Public Survey respondents visited this market last year.

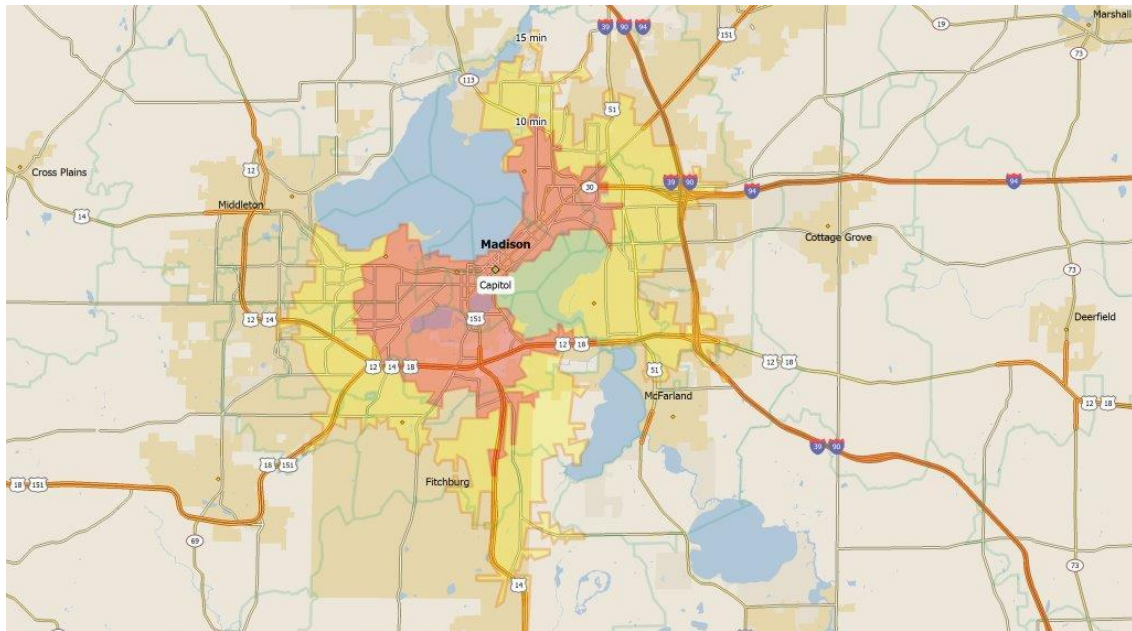
However, in the focus groups we learned that many use the market as a social/tourist destination.

- **Race and ethnicity of Madison is changing and fueling more interest in specialty and ethnic foods – by all types of consumers.** As noted, since 2000, Madison’s Black population has grown by 40.6%, its Asian population by 44.5%, and its Latino population has more than doubled (Scanus, 2014). There appears to be an interest in purchasing ethnic and specialty foods and ingredients based on the consumer focus groups and both consumer surveys:
 - 10% of Panel Survey respondents shopped at specialty stores in the past month
 - 18% of Panel Survey respondents said that the selection of specialty and ethnic food strongly influenced where they shop; however, Panel Survey respondents were less enthusiastic about being introduced to new foods, with only 4% saying it strongly influenced where they shop.
 - 35% of Public Survey respondents, which is likely representative of the core market shopper, said the selection of specialty and ethnic foods strongly influenced where they shopped.
 - 18% of the Public Survey respondents said that stores that introduced them to new foods strongly influenced their choice of where to shop.
- **Based on the Panel Survey, lower income shoppers, while having less disposable income, showed in the Panel Survey strong interest in purchasing local foods and were no more price sensitive than the rest of the Madison population. They were however, significantly more sensitive to traveling farther than other respondents to the public market.**
- **Customers now have strong social concerns regarding food purchasing, and shopping now has taken on a moral implications** leading to triple bottom line, that is, business profits, social justice, and the environment. Consumers are increasingly concerned about supporting local business, seeing fair trade practices, and in addressing environmental concerns like in LEED designated buildings, and recycling. This is a nationwide phenomenon and growing trend, and seems to be particularly pronounced in Madison where residents have long drawn connections between food buying choices and social/community consciousness.
- **During the public outreach session and focus groups, there was considerable interest not just in food, but also in arts, music, and other cultural events.** The development of a public market is a process of attracting the right mix of tenants and users that will add

to the market's attraction. In the public outreach session, many possible complementary uses were suggested for the public market and these ideas were further tested in the consumer and vendor surveys and focus groups. When asked to select up to three amenities which would make a public market in Madison a great public destination, the most popular choices were Space for Cultural Events and Performances (42% Panel/47% Public), Beer Garden (40%/43%), Kitchen for Cooking Classes and Events (37%/54%), and an Indoor/Outdoor Community Gathering Place (37%/54%). Less popular amenities included Adjacent to a Park for Recreation (23%/24%), Studio and Gallery Spaces for Artists (20%/33%), and a Playground (11%/22%).

- **People already gravitate to great places in Madison: there just are not enough of them -- especially in the winter --- suggesting a pent-up demand for a community destination.** While this situation could potentially be seen as a challenge, the fact that when a space is provided that is attractive, lively, safe, and sociable, people flock to it. Examples include markets, such as the Saturday Dane County Farmers Market (although neighborhood markets were not highly valued as gathering places in the consumer study), as well as places like the UW Memorial Union, Vilas Zoo, activities at Monona Terrace, Badger sporting events, and the numerous festivals and events held around the City. When we asked in the Panel Survey, where people like to socialize 79% said the most preferred place was either the UW Memorial Union or Monona Terrace – both feature a strong water component. Madison could use more great public spaces for socialization especially near the lakes.

- **Most Madison residents can reach any part of the city within 30-minutes, a positive factor because public markets have potential to draw customers from broader distances.** Supermarkets in Madison have *de facto* trade areas based on their present locations ranging from 5 minutes to 15 minutes. The Panel and Public surveys indicate that potential market customers would consider a 10 to 15 minute drive time to shop at a public market. The map below illustrates an approximation of the area a 10 (red) and 15-minute (yellow) drive time contour might cover from the Wisconsin State Capitol.



Challenges

- **Price sensitivity:** The Panel and the Public Surveys had a large divide on price sensitivity. In the Panel Survey, 63% said that Low Prices strongly influenced where they shop for food, compared with 39% in the Public Survey. Price sensitivity came up in the focus groups and in the opened-ended questions in both surveys. It is also demonstrated by where people shop, with Woodman's, a low-cost food provider, ranking number one in the Panel Survey. The Public Survey respondents, however, are far less price sensitive than the public.
- **Madison already offers consumers a lot of food buying choices.**
 - The Madison area has about 40 supermarkets including seven stores like Costco, Target, Walmart and Sam's Club with an estimated 2.2 million gross square feet in gross building area.
 - Besides these large-scale sellers, Madison also has specialty food stores like cheese shops, seafood stores, butchers, and bakeries.

- **Consumers seem generally satisfied with their food store.** The focus group participants were, with some exceptions, generally satisfied with their food stores. Most of the supermarkets, with just a few exceptions, have newer or remodeled stores and are good merchandisers.
- **Madison residents have psychological barriers in traveling between East and West.** We were told frequently during our meetings and focus groups that there is a psychological driving barrier in Madison, dividing the city between east and west. This “East/West divide” will have to be addressed as the project develops.
- **Existing winter farmers markets are not as heavy a draw as summer markets, and do not attract as many repeat visits.** Only 10% of people surveyed in the Panel Survey visited the Winter Dane County Farmers Market at Monona Terrace since November, 2013, and of those who visited this and other winter markets, 81% went only one or two times. From the open-ended responses, it appears that there is a high level of “disinterest” in these markets (most people skipped replying), but comments suggest they lack the critical mass (and fresh produce) of the summer markets and are restricted by space. However, we’ve heard anecdotally that the breakfast affiliated with the Winter Dane County Farmers Market at the Senior Center is a popular attraction. Combined with the response that only 9% preferred community centers and 12% said libraries were preferred places to socialize, this suggests that indoor public spaces -- such as would exist in a public market -- may not necessarily be automatic social attractions.
- **Access to the market, especially in terms of parking, is a major concern.** In a “word cloud” of the most commonly used words in the open-ended consumer question: “what would make the market an extraordinary destination?” “Food” was number one most mentioned word and “Parking” -- convenient, free, and abundant -- was the second most mentioned. That the market would have access by other modes (walking, bicycle, and transit) was frequently mentioned too, but not as much as parking.

Opportunities

- **The market needs to be more than a food destination, but an extraordinary, year-round destination for residents of Madison to not only shop but to gather.** Madison’s shoppers are willing to travel to a variety of stores for their groceries, as seen in the surveys and focus groups, but they need a compelling reason to do so. If the new public market is seen as a strong social and food destination, large enough to make the trip worth their while, and adjacent to a variety of other attractions, it will be better suited to succeed alongside the City’s other grocery and specialty stores. It is not just about the market, but about “Placemaking”, which the market is one component. The creation

and maintenance of this market as a great public place will require others, outside the agriculture and food fields, including artists, musicians, and public. The market will need to be programmed so that it provides the setting for spontaneous connections to occur.

- **The market needs to feature vendors and items that address all price levels.** The market cannot become a place that is considered expensive and all residents should be made welcome to visit.
- **The market should highlight and promote its commitment to local food and regional growers and producers.** While local food is still gaining ground in Madison, it is clear from the focus groups, surveys, participation in CSAs, and interest in farmers markets, that consumers are open to supporting these ideals.
- **The market should become the place in Madison to buy and eat ethnic foods and ingredients.** Tapping into the growing diversity of the City, and many peoples' broadening interest in international food, the market is poised to fill a gap not currently well met by the City's grocery stores.
- **The market needs to be accessible for as many people as possible.** While concerns were expressed from consumers about parking, in PPS's experience, parking can be used as an excuse when the destination is not worth the drive and hassle of parking. Most successful public markets have a parking "problem" and the challenge is balancing the space and amount of parking with the need for space for uses and public spaces that will actually be the attraction. Locations with strong walk-in or bicycle clientele can mitigate this issue.

Place: Recommended Public Market Type & Site Selection

During Phase I of the Madison Public Market Business Plan Project useful information was collected that provides direction for the type of public market that Madison should pursue as well as its potential site. These implications include:

- **The public market needs to incorporate the principles of PPS's principle, the Power of 10, and be more than just an aggregation of food businesses.** People shop at public markets not just for the economic transaction but for the social and community experience-- and that experience can translate into higher sales. In Madison, where there is abundant food buying choice, the public market would need to differentiate itself by becoming a dynamic community destination, where a variety of activities and uses co-locate synergistically. The Power of 10 principle states that a site for a major destination, like a public destination, should have at least 10 things to do. While the number 10 is arbitrary, a site for a public market that has adjacent uses that complement the market nearby will be less costly to develop than one where the market has to build the 10 uses from scratch.
- **There is an inherent tension between some uses for a market (large scale wholesaling vs. creating a gathering place with small retailers) that will have to be resolved during site selection.** As noted in the above *Products* section, however, the most interest by potential vendors was in retail and small-scale production and wholesale, not large docking facilities.
- **Access and parking are important considerations but not the only consideration.** Every public market site involves some compromise on this factor – a huge amount of free parking is not a panacea for a market that is not a strong draw. Clearly, making the market convenient by diverse transportation modes and a great destination needs to be considered together.
- **With the right site and location, the economic development benefits to the community around the market should be as much of a consideration as the economic benefits of clustering food businesses. Other ancillary uses and development potential may emerge depending on the site as well.** The public market should not be envisioned as a stand-alone facility, but should connect and extend into the adjacent community. Such connections will make its spinoff benefits more achievable and help increase the attraction of the market itself. Aligning the public market with other City investment strategies and public/private partnerships should be considered to enable the market to create synergy and build on other existing momentum.
- **The possibility of a public-private partnership, in terms of the co-location of private**

food retail and a public market, should be kept open. We should remain flexible in terms of market form and location as to how we think the market could be developed: what constitutes public investment and private investments. Food producers could keep their independence, but co-locate at the market site, creating a critical mass. This is actually a historic way public markets have evolved, for example Seattle's Pike Place Market was originally all privately owned, as was Detroit's Eastern Market.

- **A location serving a diverse population will help the market socially and economically.** The market needs to reach out to minority and ethnic vendors so customers can feel more comfortable shopping knowing that their vendors understand their needs. The market also needs to be in an area accessible by public transit or it must provide alternative means of making the market physically accessible. In addition, the design of the market should reflect good economy that welcomes all people without viewing the market as too expensive or the merchandise appearing too precious.

Types of Public Markets

To determine the recommended type of public market for Madison it is important to review the various forms that markets can take. Markets have been developed or redeveloped in a wide variety of physical shapes and configurations. These forms can be viewed along a spectrum, from simple and temporary at one end, to complex and permanent at the other.

While many combinations and variations exist in between, there are four basic forms:

Open-Air Markets

On the simple side of the public market spectrum, open-air markets tend to operate on a seasonal basis in a temporary location, such as a plaza, street or parking lot with only pop-up tents for infrastructure. Frequently, these markets take place only once or twice a week. Most of the country's approximately 8,000 farmers markets take this form, and it is also popular for craft and flea markets. Without property, open-air markets are typically less expensive to develop and operate.

Covered Markets

Like an open-air market, covered markets may also only operate seasonally and for a day or two a week, but they are slightly more complex because they include some kind of overhead structure, similar to a shed roof. This overhead structure not only protects customers and vendors from the elements, while often retaining an open-air orientation, but it also provides the market with an air of permanence because the structure remains in place even when the market is not in operation. When the structure is not being used for a public market it can be used for other needs, such as a covered parking area.

Market Halls

Leaping forward in terms of complexity is a market hall which is a public market that operates in an enclosed building, usually year-round, several days a week or every day. This type of market is much more complex and risky than a covered or open-air market, but the potential reward is also greater. To supplement full-time merchants, many market halls also have part-time vendors, such as farmers and crafts people, who sell from “day tables.” These spaces can be rented by the season or day and offer entrepreneurs a start in retailing while also keeping the market’s product mix fresh with new and seasonal goods.

Market Districts

At the top of the public market evolutionary scale is the market district. These districts are areas in a city where the public market – which itself can take many forms -- is a centerpiece and related businesses, such as restaurants and specialty food stores, choose to locate to create a synergistic and dynamic economic zone. Some market districts have special land use and architectural controls to preserve the area’s flavor and purpose, as well as common management and promotional efforts.

Recommended Public Market Type for Madison – Market District

Based on the results of the Madison Public Market Business Plan Phase 1 tasks, PPS recommends that Madison pursue the development of a market district. As previously mentioned in the *Products* section, there are a variety of different types of vendors who want to actively engage in a public market in Madison, but have differing needs for participation. For example, farmers are interested in having more retail opportunities but in a temporary setting; value-added and prepared food producers want to expand their businesses with a permanent stall or storefront; and new food entrepreneurs need a place to try out and test their products in a retail environment and may need access to a commercial kitchen. One specific market form doesn’t necessarily work for all of these potential vendors, but a space in the City that can physically accommodate both permanent and temporary retail marketing, as well as potential production and wholesale distribution has the potential to meet Madison’s various desires.

Market District Characteristics

One major characteristic of a market district is that it enables the co-location of businesses with differing operating requirements that may have different operating days and times. For example, market districts can and frequently do include a flexible indoor/outdoor shed, permanent retail, programming space and public space. This enables the district to operate at different times (seasonal, year-round, daily, weekends only), depending on the needs of its businesses.

Market districts can accommodate these operational differences in a variety of ways. The Santa Fe Farmers Market in Santa Fe, NM, for example, is a relatively new and smaller market district that accommodates a variety of business types from farmers selling at an open-air farmers market once a week; to permanent shops that are open Saturdays and Sundays; to a private brewery that is open seven days a week. In Detroit, MI, the Eastern Market, one of the country's oldest markets districts, does the bulk of its business through wholesale transactions which occur primarily in the middle of the night. However, Eastern Market's retail markets on Saturdays (and Tuesday in the summer) are extremely popular with the public drawing people from across the region. Both the wholesale and retail market activity at Eastern Market has occurred within the market's five sheds located on approximately eight acres for decades, but perhaps most importantly this various activity has spun off to include many private businesses, open Monday through Saturday, that surround the sheds. These businesses include retail uses (specialty stores selling cheese, wine, fish, coffee, etc.), restaurants, wholesalers (meat, produce, poultry, etc.) and more recently home goods stores selling locally made products and even residential housing.

A market district by its very nature contains both public and private businesses. While some portion of Madison's market district may remain in the public's control, e.g. a retail farmers market or food business incubation services, other businesses within the district may be developed privately such as a brewery or bakery. The district public spaces - streets, parks, plazas - would also remain under city control.

The best market districts, like Eastern Market in Detroit, not only accommodate a variety of business types but they have a sense of critical mass most days of the week. This should be the goal for Madison. Along with the diversity of needs from the production side of a public market, as mentioned at the beginning of this section, a market in Madison needs to incorporate PPS's Power of 10 principle and be a dynamic community destination, where a variety of activities and uses co-locate synergistically in order to stand out in an already dynamic field of food options. This potential market district, which would not just be a stand-alone facility, would connect and extend into the adjacent community and potentially create many spinoff economic and social benefits.

Proposed Site Selection Criteria

The site for any public market has a major impact on its mix, form, economics, uses and customer base. If there is a decision to proceed in Madison, the next step in the process is to identify potential sites and study the implications for a public market on those sites. To begin this process PPS has developed Site Selection Criteria which are organized into two categories: community/customer criteria and technical/business criteria. For a market district to be successful in Madison the public and the vendors need to meet a variety of benchmarks. The

first category – community/customers – should be informed through a series of public meetings held throughout the City to enable Madison residents the ability to provide input on what criteria for a public market site is important for them. The second category – technical/business – will be evaluated through data collection.

Site Selection Criteria

Community/Customer Criteria

- Visible: a location visible from a major traffic route, or in a place well-known in Madison.
- Opportunity for positive spin-off:
 - Economic and community development adjacent to the market.
 - Opportunity to link to adjacent uses and amenities (retail, institutions, parks, water views etc.) that will add synergy to the market.
- Sufficient size to enable the market to be a multi-use destination & community gathering place:
 - Space for the food uses, as well as other complementary activities.
 - Access and facilities for small and medium scale wholesale operations.
- Potential for infrastructure and highway access for possible food processing and wholesaling (a plus, not required).
- Opportunity to serve diverse populations within the City.
- Connected and accessible by walking, bicycle, and transit:
 - On a major transit route or near a transfer location.
 - Within walking distance of a nearby neighborhood.
 - On or near a major bikeway or bike route.
- Adequate space for parking.
- Comfortable for year-round use.

Technical/Business Criteria

- Development potential:
 - Site availability (sooner than later)
 - Cost (reasonable and affordable)
 - Opportunity for public-private partnerships, enabling some uses and facilities to be developed privately as part of the district.
 - Leveraging existing City-owned property (including streets and public spaces).
- Sales/Income potential:
 - Site delivers sufficient sales potential, in part as revealed by the gravity model analysis and a demographic analysis of the trade area (i.e., 10 minute drive time of a core of market customers) and proximity to service daytime employees.
 - Scale/size of the site to generate sufficient income to cover operating costs.

- Access potential:
 - High level of vehicle counts, transit ridership, and existing pedestrian activity; convenient access to the site (with minimal left turns from major roads).
 - Parking assessment: enables more parking on weekends than weekday, or enables the opportunity for shared parking.
 - Large scale wholesale access constraints
- Spatial potential:
 - An opportunity for an outdoor (or covered outdoor space) as well as indoor experience of sufficient scale.
 - Feasibility of co-location and synergy of uses with differing operating hours
 - Ability to grow within the site over time

Conclusion

As evidenced in this Report, two of the key elements for a Madison Public Market, large numbers of willing buyers and sellers are solidly ready for this project. Already a 'hub' for local foods, the Madison area has one of the most robust and expansive food communities in the country. Growers and producers have multiple outlets for selling, and customers can buy direct from farmers, as well as an increasing number of conventional outlets that are supplying more local products.

While this bounty bodes quite well for the general acceptance of a public market, it presents challenges to develop the public market and build the local food economy in the context of enterprises that are already up and running. The needs of wholesalers and retailers can be divergent, and this too presents a challenge to meet the expectations of all parties. The third element critical to the success of Madison's public market will be a 'place' with inherent qualities that make it an attractive destination for shoppers and operationally practical for sellers.

Initial expectations for the market are high, but we also know that successful markets such as Pike Place in Seattle and Eastern Market in Detroit are the result of how they were able to grow within their location and respond to changing desires. Taking this into account, if the City decides to 'go' and move forward with the site selection phase of this study, PPS's next phase of work will include analyzing prospective sites and their suitability for today's needs, as well as how the market could grow over time; a characteristic that is vital for the success of a public market.

Appendix

Appendix A: Organizations Interviewed

Appendix B: MPM Open House Summary of Input

Appendix C: MPM Vendor Open House Summary of Input

Appendix D: Madison Food Business Survey

Appendix E: Madison Food Business Survey Results

Appendix F: MPM Market Analysis

Appendix A: Organizations Interviewed

Organizations Interviewed:

City of Madison – Economic Development, Mayor’s Office, Street Vending, Public Health

Common Wealth Development

Community Action Coalition

Dane Buy Local

Dane County

Dane County Farmers Market

Fair Share CSA

FEED Kitchens

Northside Planning Council

REAP Food Group

RP’s Pasta Company

Something Special Wisconsin

University of Wisconsin Cooperative Extension – Dane County

Willy Street Coop West

Wisconsin Farmers Market Association

Wisconsin Food Hub

Wisconsin Grocers Association

Appendix B: Madison Public Market Open House Summary of Input



Public Open House

Summary of Input



Summary of public input provided at an Open House
to kick-off the Madison Public Market Business Plan

October 29, 2013



Introduction:

The City of Madison recently launched an effort to create a business plan for the Madison Public Market. This initiative is being led by the Madison Local Food Committee with consulting support from Project for Public Spaces, Inc.

To kick-off the business planning effort, the City hosted a Public Open House on October 29, 2013 to gather input and ideas. This Open House was the first of what will be numerous opportunities for residents and businesses to get involved in the Public Market project.

The format for the Open House consisted of asking participants to share their thoughts and ideas in response to three broad questions:

1. What are your Hopes and Wishes for a Healthy and Vital Madison Public Market?
2. What are your Issues and Concerns regarding a Madison Public Market?
3. How can you help make the Madison Public Market happen?

The following is a compilation of all the ideas shared in response to these three questions.

Get in Touch!

If you'd like more information about the Public Market project or have additional ideas, please contact:

Dan Kennelly, City of Madison
608-267-1968
dkennelly@cityofmadison.com

To stay up to date on news and information about the project, visit our webpage and subscribe to the project's email list.

www.cityofmadison.com/publicmarket

Question 1: Hopes & Wishes

Location

- Downtown to Yahara River location
- Location, location, location
 - Near downtown
 - Accessible for all
 - Affordable
 - On bus line
- Located in an area that could use some revitalization (South Madison area)
- Central location
- Central with parking
- Near East-Side location!
- Central Location
- May I suggest out South side? Easy access to downtown. Easy access to Beltline, Highway 14, 18 and 151 – important to have space accessible to farmers, vendors and from out of town, as well as citizens.

Access

- Ease for out of town transportation
- Parking
- Access for local farms and ability for new farms to enter/get involved once space/quotas fill up
- Public transit access
- Bike route access
- Exceptional pedestrian amenities, including pedestrian signage (not just for cars) that draws people from surrounding area
- Lots of free parking

Uses and Activities

General

- Someplace in Madison becomes a permanent/official place for local food events/meetings/business for the region – open to all
- Multiuse – retail/local goods/crafts/food
- Columbus, Ohio has a wonderful market
- Attracts locals as well as tourists
- Synergy with existing summer markets
- Youth entrepreneurship
- That stories of the food producers/marketers/preparers/consumers are featured frequently and in multiple ways: Portraits, live interviews, photo/text panels, etc.

“Green”



- Use of solar panels, solar hot water heaters, wind turbines, geothermal
- Sustainable
- Is attractive, sustainably built with green technology and has artistic elements
- An area highlighting native plants and animals or providing habitat please!

Food

Processing/Aggregation/Distribution

- Include food and vegetable processing
- Cooperative commercial kitchens
- Distribution and aggregation with technical assistance available
- Include cross docking
- Include packing facilities for fresh produce
- A place that facilitates aggregation and distribution of produce from local growers to institutions (schools, hospitals, etc.)
- Public Market is tied to cold storage
- Public Market is tied to fast food processing facility for local produce
- To make it a place that not only creates a community space, but partakes in wholesale, maybe even with the University
- Reinforces IFM (Institutional Food Market)
- Inclusion of production facility

Retail

- All local businesses/vendors – no chains
- Brewery
- Local Farms
- Restaurants (nice and/or fast and/or cheap)
- Fun! Diverse in products
- Provide space for new artists/growers/producers/vendors who want to experiment and try new things
- Make this a State market – cherries, berries, white fish, etc.
- Biergarten!
- Possibly dovetail with both indoor farmers markets (instead of Monona Terrace and Senior Center) – cool local breakfasts (chefs, etc.)

Affordability

- All food vendors accept Food Share (EBT/Quest card)
- Integrate programs and/or services that work to provide better food security for those in need
- Diverse community access
- As a customer, it is sometimes expensive compared to normal market. With more description about the difference of those goods compared to those of normal market, it will be more fun to buy foods with higher price.
- EBT/Food Share terminals for each vendor
- Serve a wide variety of people. I'm guessing that serving low-income will be the biggest challenge, so have low-rent "stalls."
- Food Security
- Opportunity for affordable healthy food

Meeting/Multifunctional Spaces

- Music/performance space
- Music, meeting rooms for local, independent businesses to use (co-working space); feels like a community hub
- Conference/meeting space
- Meeting spaces (for non profits) of various sizes with publicity help (e.g., market and electronic blog support)
- Space for education is important – rotational displays and presentation forum
- Education opportunities
- Music and food and art
 - ✓ “Meet Madison’s Chefs/Farmers”
 - ✓ Cooking classes
 - ✓ Crafts
 - ✓ Hobby classes taught by residents
- Space for culinary classes and job training
- Kitchen space for community groups to cook community meals
- Food, retail and lots of space for community gathering (up to 200+ people)
- Mixed spaces (small/big) – rental spaces, permanent and not

Art/Cultural Uses

- Art retail and studio space
- Public local art (interactive)
- Entertainment
- Have cultural things (performances, arts, etc.)
- Outdoor movies and music space
- Love the comments regarding public art, performance space, etc.
- Include arts and culture in a meaningful way
- Community participatory art project space (Lily Yeh is a great model of what this can be)

Public Spaces

- Flexible public space that’s truly open – keep fenced-in seating to a minimum!
- An open, airy space (but indoors) to facilitate community gathering in winter
- Would like to see both indoor and outdoor public space – indoor for winter, but some outdoor park-like space too
- Natural play area
- Recreation, parks
- Study space for students and community members to feel welcome to sit for hours if they want (outlets!)

Relationships

- Let’s involve MATC and UW students from the beginning. More and more they prefer local and healthy.
- Public Market is tied to MMSD (school)
- Ties to Madison food carts
- Ties to MATC culinary program

Question 2 – Issues and Concerns

Participation

- Focus group interest

Income

- Might serve only mid-high income
- Must be a place where all feel welcome, not just white middle- and upper-class “foodies”
- Ensuring access by low-income people to healthy food choices

Access

- Might not be accessible by multiple modes of transportation
- Accessible by bus and walking for people of all income levels
- Accessibility is vital. Many people can walk downtown, but parking becomes limited. Before implementing anything, understand Madison.
- Parking

Economics

- Might be a challenge to be economically viable
- Rent (affordable)

Collateral affects

- Don't hurt any existing markets by drawing away customers

Location

- Site Selection – Make sure to assess the presence of small family-owned businesses and the effect of the market on them. Especially if the owner is a minority or an ethnic food store.
- Wherever it is located, it must be 'of' the community and 'for' the community

Stall Access

- The Dane County Market has become impossible for new food entrepreneurs to get a spot. How will this market continue to draw new blood over time, even if spots are full?

Seasonal Variations

- How do you keep the market vibrant in winter when there are few locally-grown fruits and veggies?

General Well-being

- Safe, diverse, affordable
- Financially sound and sustainable

Strategic Intentions



- Need to keep initial focus small enough to make the impact of Madison's Public Market significant. Choose the best location to serve the community's needs. LISTEN to the community! Collect as "much feedback" as you can. MAINTAIN A VIABLE SCOPE!
- Overly complicated structure
- Too expensive for tenants – cost structure
- How important do you think UW students as a group of consumers?
- Using local resources – construction, artists, materials in construction
- Respond to community needs and engage the residents in real ways

Activities

- There should be free things to do to welcome people from all income levels

Vendor Considerations

- New GAP Rules (Fresh fruit & veggies). Eighty percent of the local growers will need parking facilities when the law goes into effect. Parking facilities will be a big part of keeping growers in business.
- From how wide an area will vendors be welcome

Security

- Food security

Market Personality

- Great to hear/see especially that go beyond the Milwaukee Public Market version. That market feels like only upscale vendors without producers. Best to have a mix. Love the idea of including manufacturers as "theatre" as well. Q – How can this market intersect with the new FEED Kitchen?
- Keeping the market friendly to the "non trendy"
- We must have a creative component to the market!
- Diverse communities feel welcome and included. Participation from all parts of Madison.

Program

- Must provide educational opportunities all the way down to pre-K. Avoid being just a place where people sell stuff.

Question 3 – What Can You Do?

Connections

- connections with local artists and arts community and facilitate connections
- Create a web portal for food and farm entrepreneurs throughout the region
- Help connect rural (producers/growers) with consumers (Madison, WI, IL)
- Talk to others, create a buzz. Possibly have connections with farm vendors.
- Dane Buy Local - We can help make connections, and we are connected to 750+ local, independent businesses. We can also assist with gathering people for input and marketing of the space.

- Can connect with Vernon County herbalists who might like the market possibilities

Marketing

- Market MPM/local foods to the rest of the world
- Provide access to (co-op) owners and synergistic tendencies

Architectural Design

- I'd like the committee to consider opening up the center of the structure – bright, open, airy
 - Heavy, timber construction
 - Energy –efficient design (LEED, maybe?)

Feedback

- Provide a market attendees feedback,

Folklore

- I can help highlight the cultural traditions and practices of those involved with food at the market

Public School Involvement

- Could help get ideas about Dane County Public Schools' involvement

Innovation and Project Management

- Help with innovation and project management,

Mapping / Design

- Mapping, design, gardening/farm to school,

Gardening

- Help with community and/or any other vegetable garden planning/planting, maintenance.

Business Development

- Start a local food related business

Appendix C: Madison Public Market Vendor Open House Summary of Input



PUBLIC MARKET POTENTIAL VENDOR OPEN HOUSE

December 10, 2013

The City of Madison and Project for Public Spaces, Inc hosted a “*Vendor Outreach Open House*” on December 10, 2013 to gather input from prospective Madison Public Market vendors. This input will help guide the business plan and design for the Public Market over the next several months. For more information about the Public Market project or to share additional thoughts and ideas, please contact:

Dan Kennelly
City of Madison
608-267-1968
dkennelly@cityofmadison.com

SUMMARY OF INPUT

Hopes and Wishes:

Generally:

- Food destination.
- Free, ample parking.
- Truly local producers/products. No locally owned chain stores.
- A public market that helps revitalize our downtown.
- Create and maintain a nice market that public would support.
- A location that enhances its neighborhood, improving access to foods, etc. – welcoming existing neighborhood activities (smaller farmers markets, perhaps, and existing retailers).
- A place that offers a variety of local products and a gathering place to support community activities.
- A place for people to gather and enjoy a variety of food and services. Huma

For Vendors:

- Be flexible with vendors, many of us have day jobs on top of our farm to run.
- When deciding what is local or locally produced, that emphasis needs to be put on the business product rather than the process.
- Big Freezer Space with individual, lockable freezers within.

Concerns and Issues:

Infrastructure/Operations:

- Affordable Rent
- Convenient access for customers and deliveries

- How expensive it will be to have a storefront?
- Concerns: rental cost, size of space, competition, must be reasonable rent in order to keep cost down/prices low.
- Cost, location, ability to operate another independent location other than our current location.
- No seven days a week for vendors! (Required).
- Local Produced Food
 - Defined as produced in Wisconsin.
- An independent storefront would be an entirely new facet to our business, requiring internal infrastructure we don't yet have. Is there any room for cooperatively-run storefronts to minimize producer costs?
- Different rules/regulations for being in a permanent facility vs. pop-up Market?

Local Food Competition:

- How will this impact existing markets (Hilldale, Monona, Northside and DCFM)? I feel like we'll have to choose this or our current markets.
- The ability to have a market that does not eliminate local farmer markets. Instead, a market that helps shift thinking to expand market shopping opportunities into a local way of living and buying goods.
- How will the public market improve (rather than compete with) our existing community business, spaces (State St., Willy St., Monroe St., etc.)?

How do you want to be involved?:

- We may want to vend, if we can do it seasonally (or have someone else sell our product).
- Interested in having a presence in the Madison Market Place.
- Permanent space with food production space. Involved.
- We would be interested in permanent space/venue for our cheeses
- Interested in a potential permanent vending space depending on situation.
- A vendor who uses local goods to produce a local product (juice and raw food bar/café) that benefits our community.
- We can sell our Wisconsin-made and raised products
- Would like to teach cooking classes and produce our weekly cooking show in addition to selling spices and WI cheese.

Appendix D: Madison Food Business Survey

Madison, WI Food Business Survey

The City of Madison is continuing to explore the feasibility of a public market/food innovation district and has engaged [Project for Public Spaces](#) (PPS) in putting together a business plan for this project. As part of this work, PPS is conducting a survey of people who own and operate food businesses – whether at a farmers market or at a permanent retail or wholesale location -- so that PPS has a better understanding of how you envision your business changing and growing in the next three to five years. This survey is a follow up to one done in 2012 by the City of Madison’s Local Food Committee.

If you have any questions, please contact Dan Kennelly at the City of Madison at dkennelly@cityofmadison.com or call 608.267.1968.

1. Please fill in some basic information about yourself and your business.

Name: _____

Title: _____

Business Name: _____

Business Zip Code: _____

Email: _____

Phone number: _____

2. How many years have you been in business? (Please circle one choice)

<1 1 2 3 4 5 6 7 8+

3. How many employees does your business employ?

None _____

1-4 _____

5-9 _____

10-19 _____

20+ _____

4. How many of your employees are members of your family?

None _____

1-4 _____

5-9 _____

10-19 _____

20+ _____

5. What products do you sell: identify year-round and seasonally? (Please, check all that apply)

	Year-round	Seasonally
Vegetables		
Fruit		
Meat		
Poultry		
Fish		
Dairy		
Cheese		
Bread and/or baked goods		
Value-added products (jams, pickles, preserves, salsas, etc.)		
Processed produce (frozen, bagged, cut, etc.)		
Flowers and/or bedding plants		
Vinegars, oils and/or spices		
Candy and/or chocolate		
Coffee and/or tea		
Beer, wine and/or spirits		
Prepared foods/ready to eat		
Café/Restaurant/Catering		
Crafts		
Jewelry		

Other (please specify) _____

6. Through what venue do you sell your product(s)? (Please, check all that apply)

- Farmers Market(s) _____
- Community Supported Agriculture (CSA) _____
- A stand on my farm _____
- Retail store that I own or rent _____
- Wholesale through a distributor _____
- Wholesale directly to restaurants _____
- Wholesale directly to a grocery store/specialty store _____
- Wholesale directly to an institution (hospitals, schools, etc.) _____
- Internet _____
- Other (please specify) _____

7. What are your average annual sales (including wholesale, direct sales, etc)? (Optional)

- Less than \$10,000 _____ \$11,000-\$25,000 _____ \$26,000-\$50,000 _____
- \$51,000-100,000 _____ \$101,000 – 150,000 _____
- \$151,000 – 200,000 _____ Greater than \$200,000 _____

8. In the past five years, have your sales:

- Increased _____
- Decreased _____
- Stayed the Same _____

9. How do you envision your business growing or changing in the next three to five years? (Please, check all that apply)

- Becoming “Good Agricultural Practices” (GAP) Certified _____
- Sell at more seasonal farmers market(s) _____
- Sell at more year-round farmers market(s) _____
- Sell more shares through my own CSA _____
- Sell more product(s) at a stand on my farm _____
- Develop my own retail storefront or a similar permanent facility _____
- Add another retail storefront location or a similar permanent facility _____
- Use a shared-use food processing facility to expand my product line _____
- Lease or buy my own food processing facility _____
- Use a shared aggregation/distribution/packing facility to sell wholesale to distributors, grocery stores, institutions and/or restaurants _____
- Develop the infrastructure/capacity at my farm or business to sell wholesale to distributors, grocery stores, institutions and/or restaurants _____
- Other (Please be specific) _____

10. What products do plan on selling in the next three to five years: identify year-round and seasonally? (Please, check all that apply)

	Year-round	Seasonally
Vegetables		
Fruit		
Meat		
Poultry		
Fish		
Dairy		
Cheese		
Bread and/or baked goods		
Value-added products (jams, pickles, preserves, salsas, etc.)		
Processed produce (frozen, bagged, cut, etc.)		
Flowers and/or bedding plants		
Vinegars, oils and/or spices		
Candy and/or chocolate		
Coffee and/or tea		
Beer, wine and/or spirits		
Prepared foods/ready to eat		
Café/Restaurant/Catering		
Crafts		
Jewelry		

Other (please specify) _____

11. What infrastructure is necessary to grow your business? (Please check all that apply)

- Cross-docking facilities _____
- Packing facilities _____
- Washing facilities _____
- Cold Storage _____
- Dry Storage _____
- Temporary stall for selling retail _____
- Permanent stall for selling retail _____
- Permanent storefront space for selling retail _____
- Permanent stall with on-site cooking preparation equipment _____
- Dedicated space for CSA pick up _____
- Shared-use commercial kitchen _____
- Your own commercial kitchen _____
- Other (please specify) _____

12. How important are the following locational factors to the future success of your business? (On a scale of 1-5: 1 being not important at all, 5 being very important)

	1	2	3	4	5
Located near my farm or processing facility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Located near other food businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Located near or in a residential neighborhood	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Located near office workers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Located in an active public place with pedestrian activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Convenient for retail customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Convenient for wholesale customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Space for tractor trailer trucks/loading docks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to transit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to bike lanes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pedestrian-friendly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High-traffic (vehicle) visibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	1	2	3	4	5
Easy access to interstate or major highway	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free parking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify) _____					

13. How interested are you in locating your business or doing business in a public market in the City of Madison? (On a scale of 1-5: 1 being not interested at all, 5 being very interested)

1 2 3 4 5

14. What unique characteristics of your business or your product(s) do you think will contribute to making the market successful?

15. What are your hopes and wishes for a healthy, vital public market in Madison?

16. Can Project for Public Spaces (PPS) contact you with further questions? (If your answer is yes, PPS may follow up via email to schedule a phone call.)

Yes _____

No _____

Thank you for completing our survey! For more information about the Madison Public Market project please visit: <https://www.cityofmadison.com/dpced/economicdevelopment/madison-public-market/426/>.

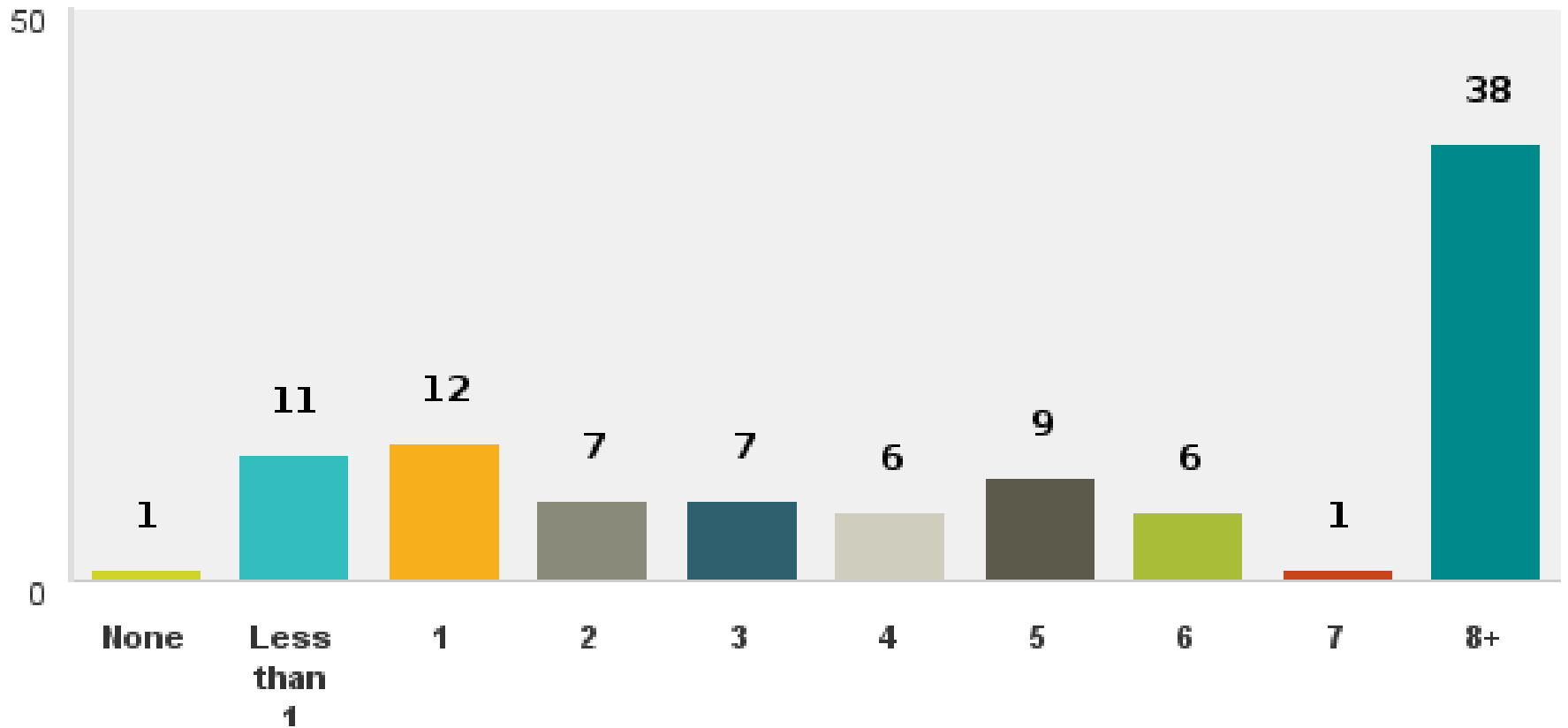
Appendix E: Madison Food Business Survey Results

Madison Food Business Survey Results

101 completed surveys

Q2 How many years have you been in business?

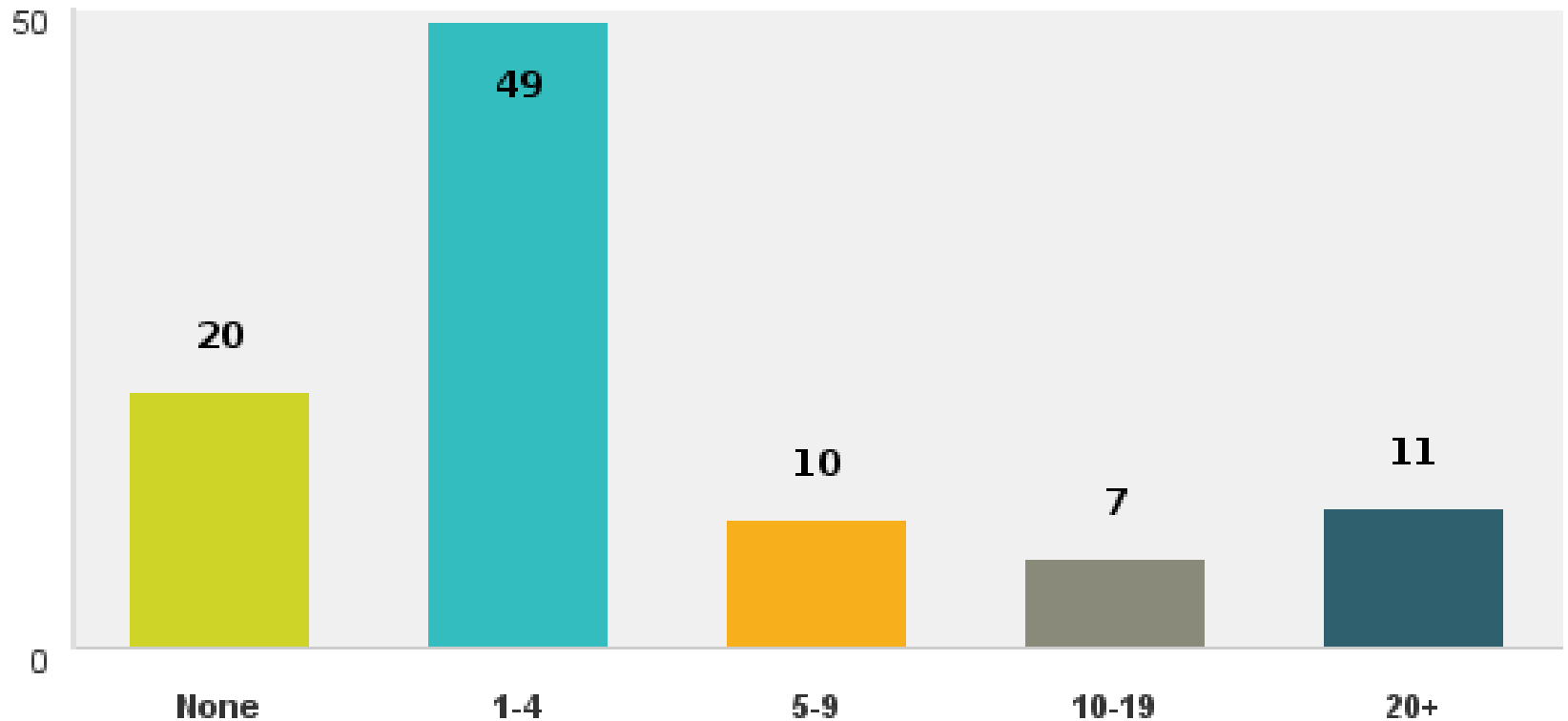
Answered: 98 Skipped: 3



Conclusion: over half of respondents have been in business at least 5 years

Q7 How many employees does your business employ?

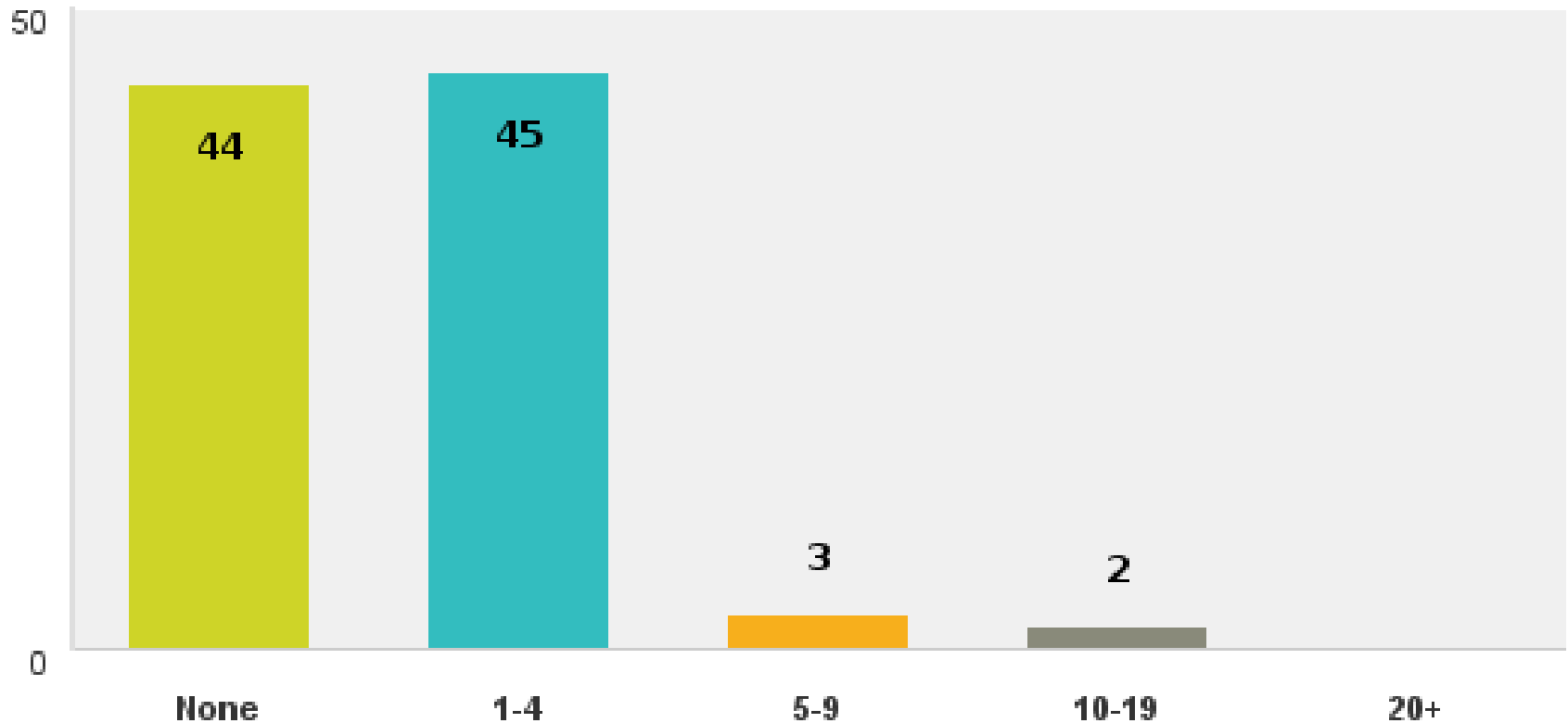
Answered: 97 Skipped: 4



Conclusion: Majority of respondents are very small businesses

Q8 How many of your employees are members of your family?

Answered: 94 Skipped: 7



Conclusion: About 50% of respondents employ family members to operate their businesses

What products do you sell: year-round & seasonally?

Year-round top responses:

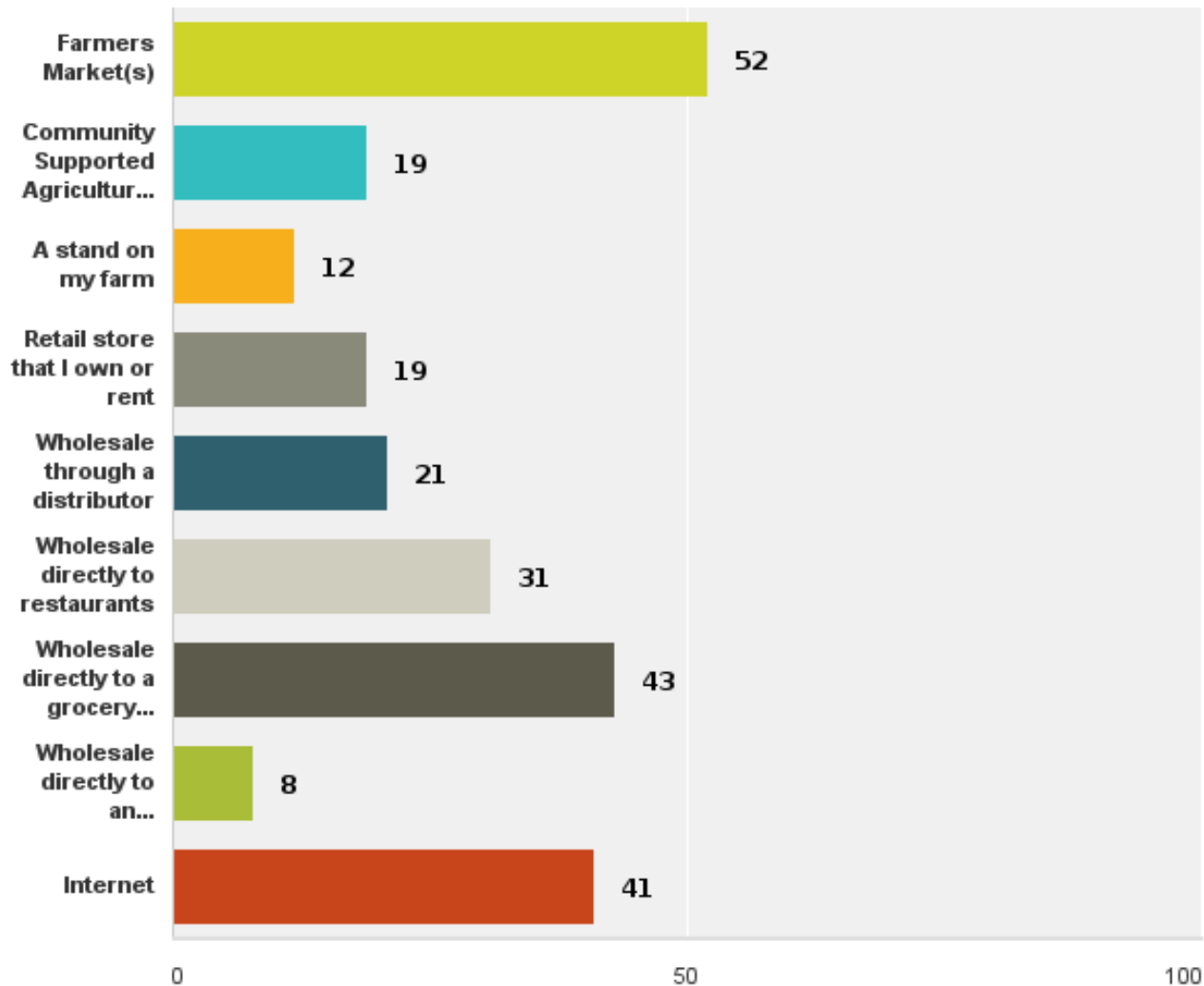
- Value-added – 24
- Meat – 17
- Bread/baked goods – 17
- Prepared foods – 15
- Candy/chocolate – 14
- Cheese – 13
- Vinegars/oils/spices - 13

Seasonal top responses:

- Vegetables – 18
- Fruit – 15
- Flowers/bedding – 7

Q10 Through what venue do you sell your product(s)? (Please, check all that apply)

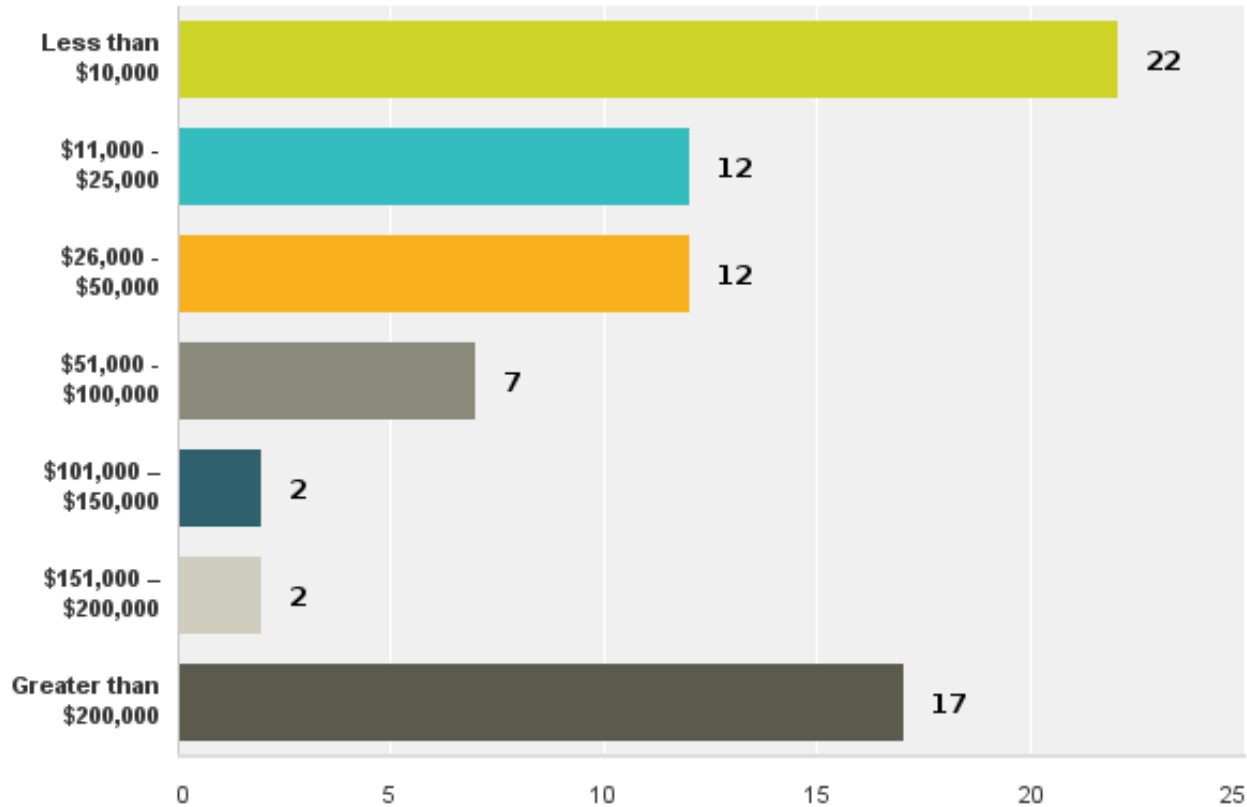
Answered: 81 Skipped: 20



Conclusion: respondents familiar with both direct and wholesale marketing models – also many products have a non-regional reach

Q11 What are your average annual sales (including wholesale, direct sales, etc)? (Optional)

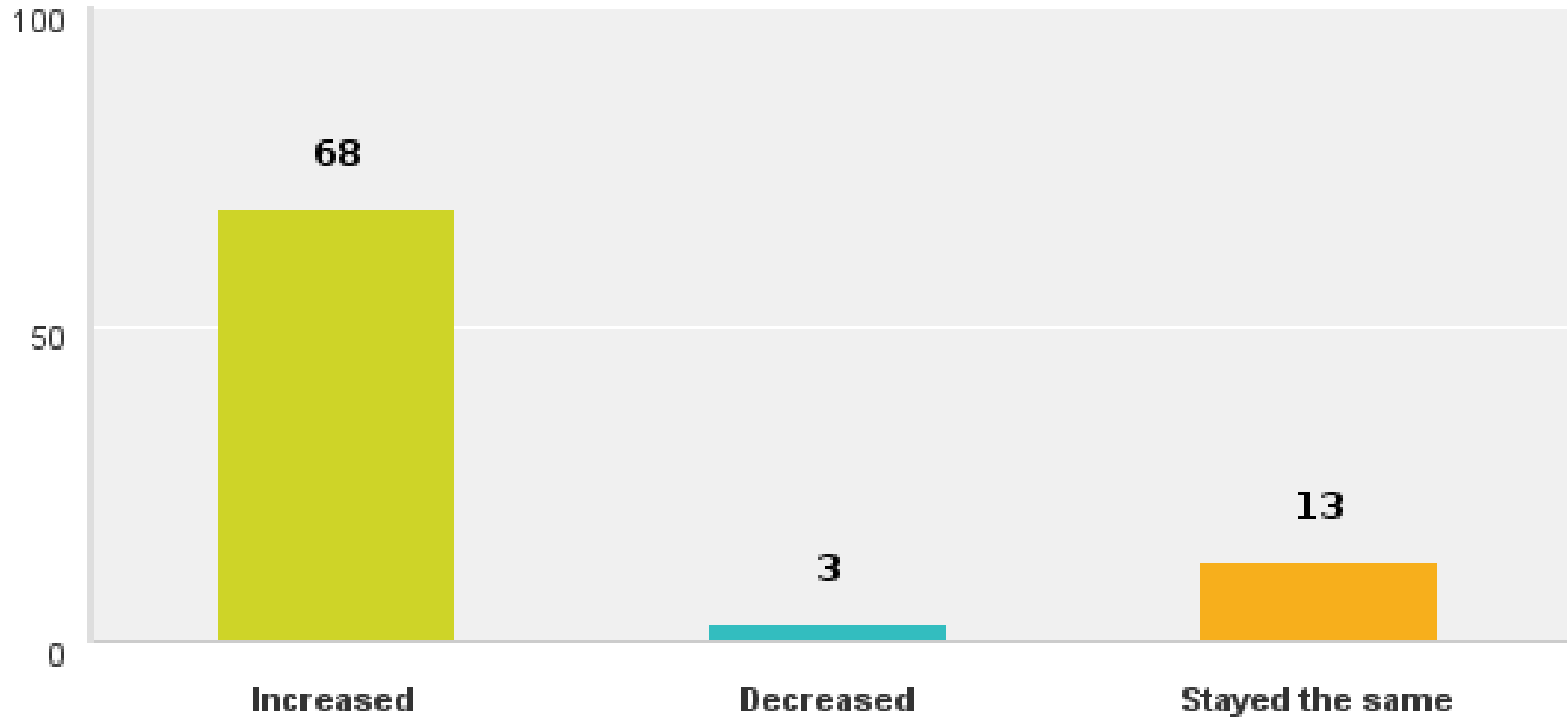
Answered: 74 Skipped: 27



Conclusion: majority of respondents have low-level sales (under \$50K)

Q12 In the past five years, have your sales:

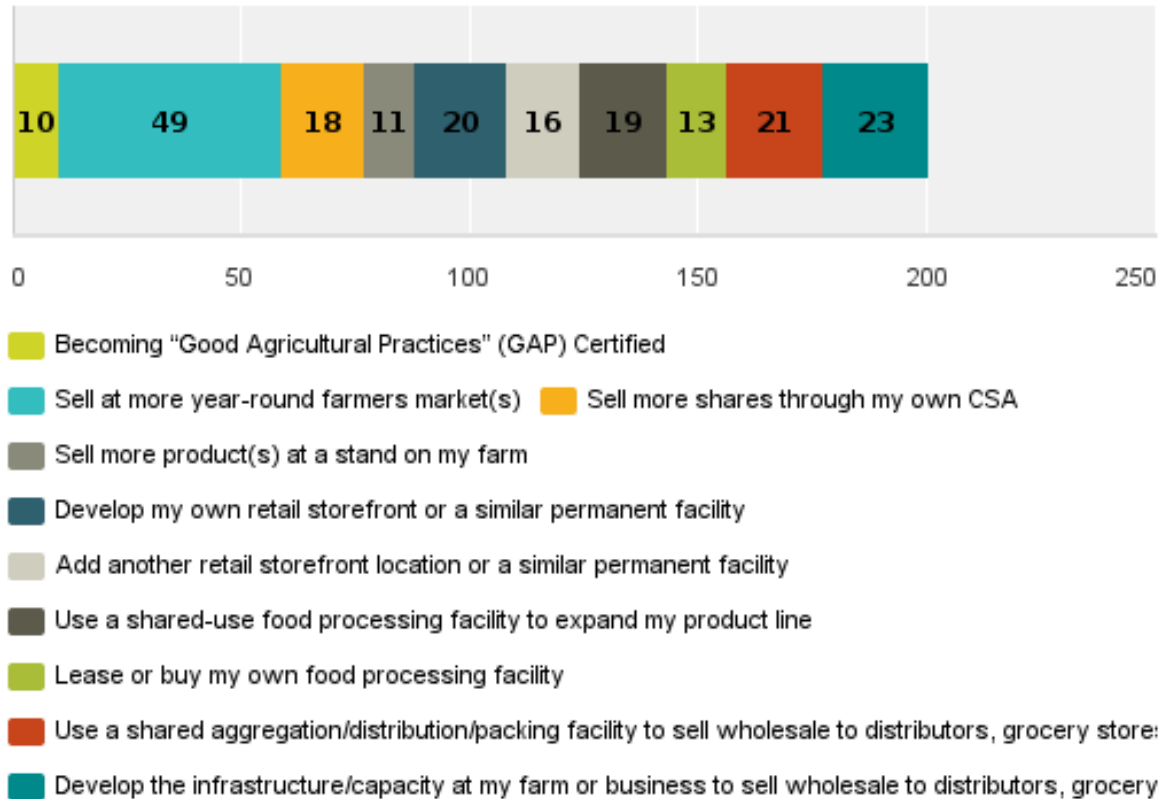
Answered: 84 Skipped: 17



Conclusion: business is booming!

Q13 How do you envision your business growing or changing in the next three to five years? (Please, check all that apply)

Answered: 77 Skipped: 24



Conclusion: High interest in retail (year-round farmers markets and retail store/stall) and wholesale

What products do plan on selling in the next three to five years: identify year-round and seasonally?

Year-round top responses:

- Value-added – 36
- Prepared foods – 22
- Café/restaurant/catering – 21
- Bread/baked goods – 21
- Meat -19
- Candy/chocolate - 16

Seasonal top responses:

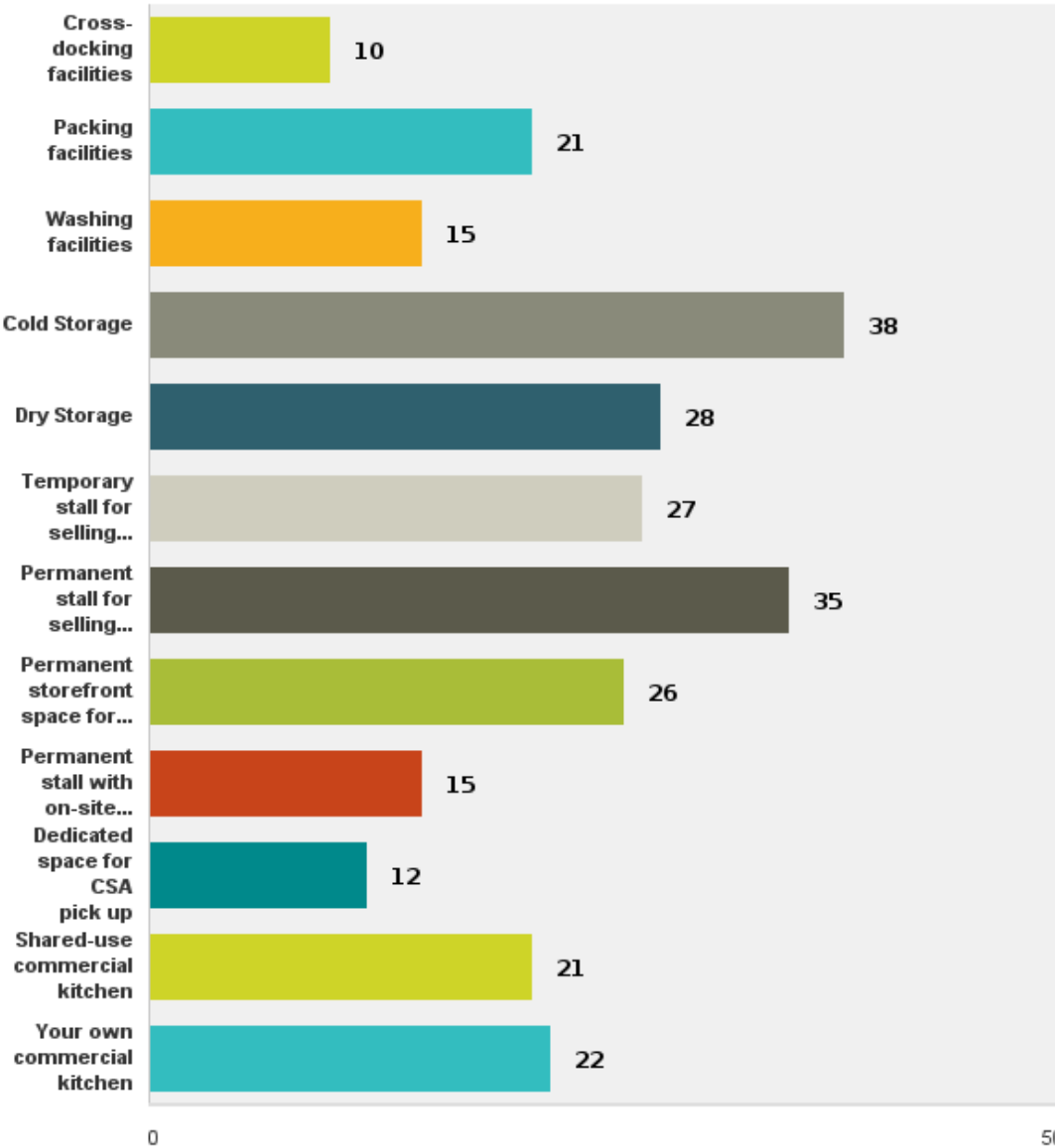
- Fruit – 16
- Vegetables - 15
- Flowers/bedding - 7

Conclusions:

- No change in seasonal interests
- Great interest in expanding into – café/restaurant/catering (13 more), value-added (12 more), prepared foods (7 more)

Q15 What infrastructure is necessary to grow your business? (Please check all that apply)

Answered: 80 Skipped: 21



High interest in:

- permanent stalls/stores
- storage (dry and cold)

Interest in:

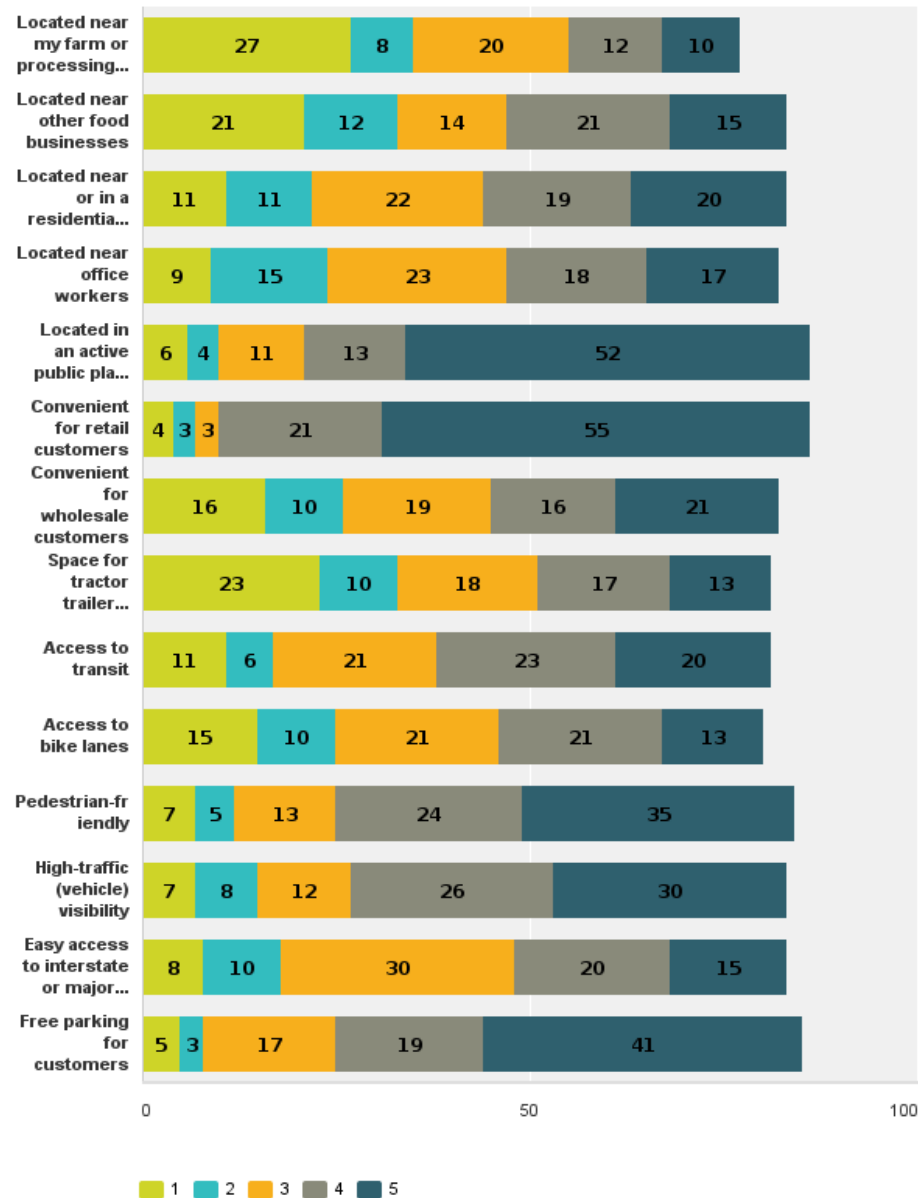
- shared-use and personal commercial kitchens

Less interest in:

- cross-docking facilities
- CSA pick-up (may be because CSA exclusive farms didn't take survey)
- washing facilities
- permanent stalls w/ on-site cooking equipment

Q16 How important are the following locational factors to the future success of your business? (On a scale of 1-5: 1 being not important at all, 5 being very important)

Answered: 90 Skipped: 11



Important for businesses to:

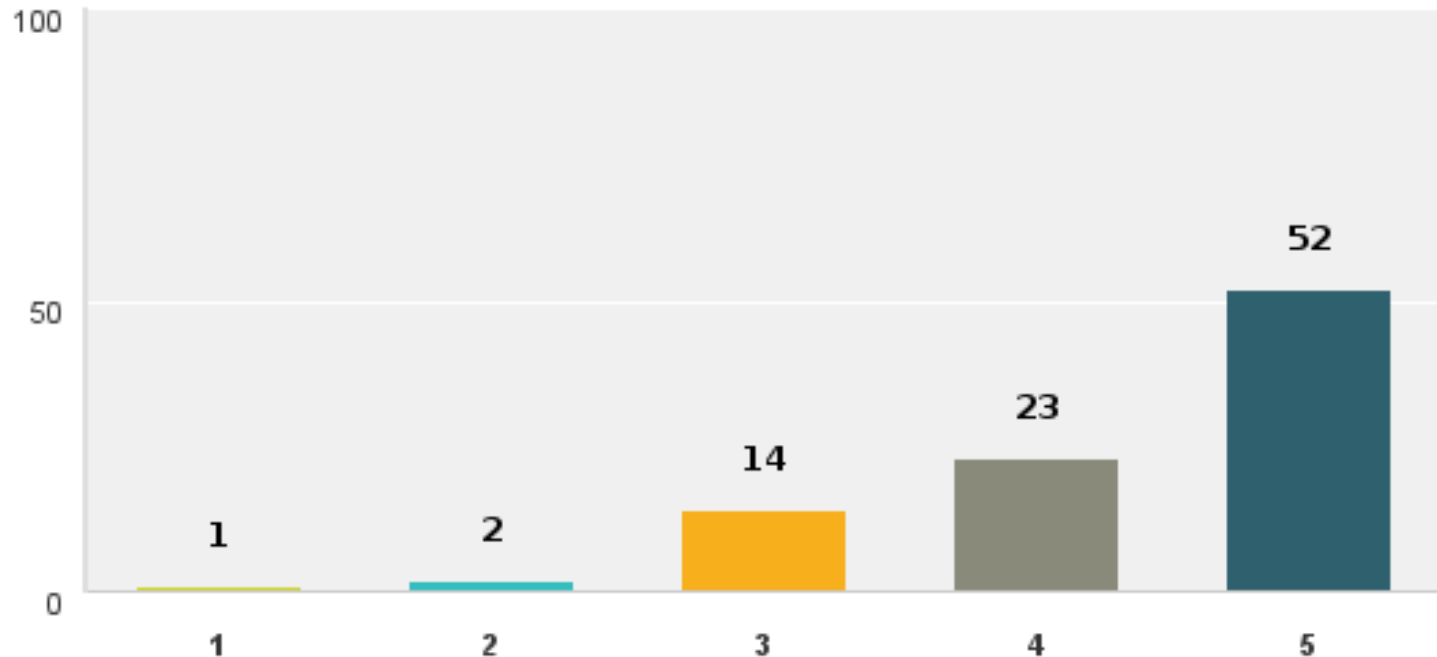
- be near active public places
- be convenient for retail customers
- provide free parking for customers
- be pedestrian-friendly
- have high-traffic visibility

Less important for businesses to be:

- near farm/processing facility
- have space for tractor trailers
- located near other food businesses

Q17 How interested are you in locating your business or doing business in a public market in the City of Madison? (On a scale of 1-5: 1 being not interested at all, 5 being very interested)

Answered: 92 Skipped: 9



Conclusion: Interest in the MPM is high

Q. 18 What unique characteristics of your potential/existing business or your potential/existing product(s) do you think will contribute to making the market successful?

Answered: 87 Skipped: 36

Appeal **Business Cheeses** Clean Corn Eat Experience
Food Grass-fed Beef Health Herbs High
Quality Line **Local Market** Meat Organic
Produce Raised **Retail Shared Shop Space** Thin
k Vegetables Vendor

Q. 19 What are your hopes and wishes for a healthy, vital public market in Madison?

Answered: 77

Skipped: 46

Access Affordable Businesses Customers DCFM
Destination Food Happen Indoor Local Location Lots
Market Operations Parking Products Regular Shop
Space Vendors

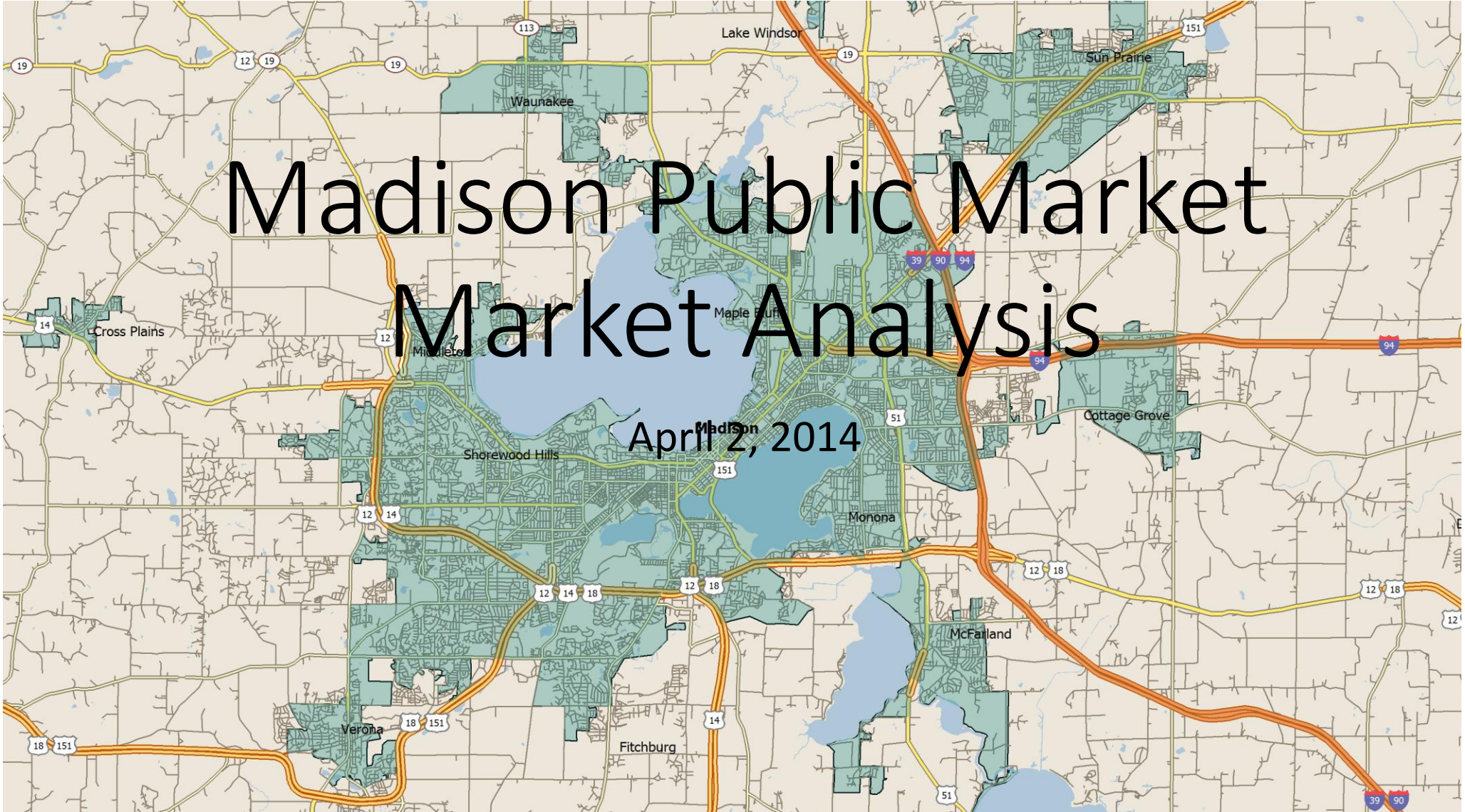
New Businesses – 4 respondents

- Interested in selling – coffee/tea, prepared foods, café/restaurants/catering
- Want to sell through – their own storefront, farmers markets, internet
- Need – permanent storefront/stall with on-site cooking equipment
- Want location to be – active place, convenient for retail, pedestrian-friendly, high-trafficked, free customer parking

Appendix F: Madison Public Market Market Analysis

Madison Public Market Market Analysis

April 2, 2014



Introduction

The PPS team has undertaken extensive research into the Wisconsin food system as it pertains to developing a public market for Madison.

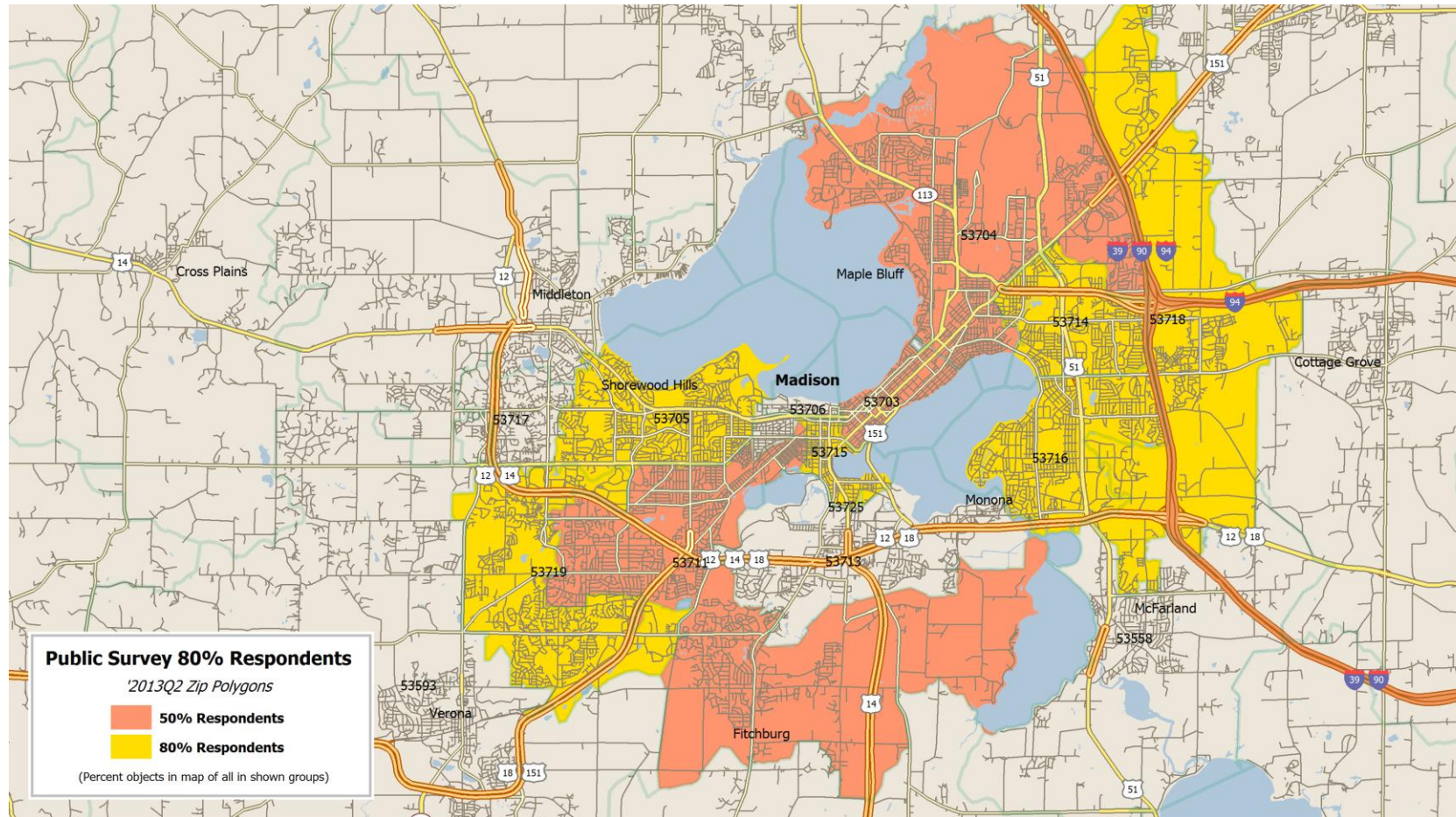
Our emphasis was on the potential vendor pool and their interest in a market. Our analysis of the vendors included surveys of potential vendors, industry meetings, telephone and personal interviews with leaders in the “food movement” and several public meetings that reached out to potential vendors.

On the consumer side, two surveys were completed. One was with a paid survey panel and the other a “public” survey that was sent to those previously identified as interested in the market and those that saw announcements in the local media. Prior to commencing the surveys, we conducted two focus groups. The participants in the focus groups were professionally recruited and the participants were unaware of the client’s identity until the end of the discussion. One group was selected to ensure a broad geographic interest and the other panel ensured there was broad economic representation.

On the demographic side, we used GIS technology to understand the geographic distribution of the Madison population.

Public Survey Respondents

The public survey's 2,083 people came from 77 zip codes. Half of respondents lived in 3 Madison zip codes, 80% came from 6 additional zips (shown in yellow).



Public survey participants by share of ZIP code population:

Zip Code	Respondents	Pop (2014 est.)	Share ZIP Pop.	Index
53726 (Near west)	57	5,300	1.08%	1.50
53703 (Isthmus)	301	28,452	1.05%	1.46
53704 (North)	421	45,055	0.93%	1.29
53705 (West)	200	24,077	0.83%	1.15
53715 (Near South)	115	14,634	0.79%	1.10
53711 (West)	311	46,756	0.67%	.96
53714 (East)	102	16,884	0.60%	.83
53718 (East)	63	12,033	0.52%	.72
53716 (East)	90	18,900	0.48%	.67
53719 (West)	76	29,197	0.26%	.36
	1,736	241,288	0.72%	1.00

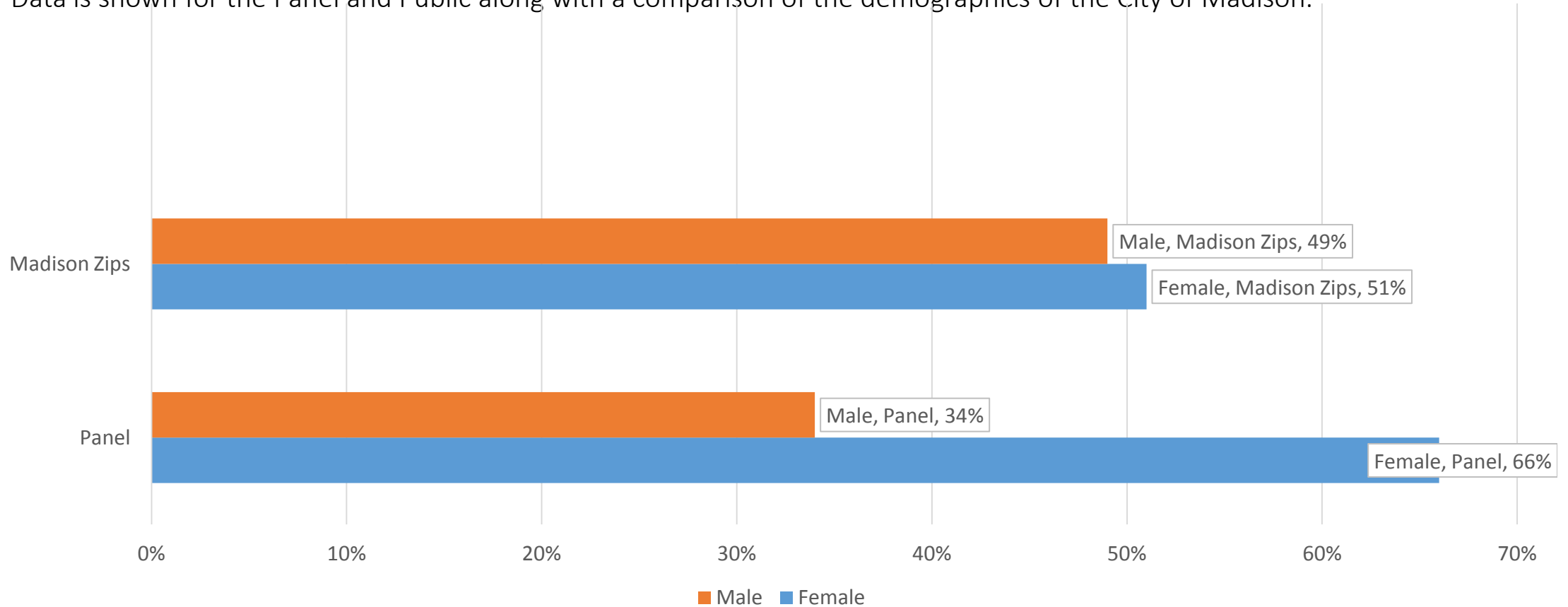
(ZIP code 53713 (South) had only 42 responses with a 0.19% share of 22,630 population with an Index of .26)

Source: Population – Scanus, 2014

Demographics of the population that took each survey:

Gender

Data is shown for the Panel and Public along with a comparison of the demographics of the City of Madison.

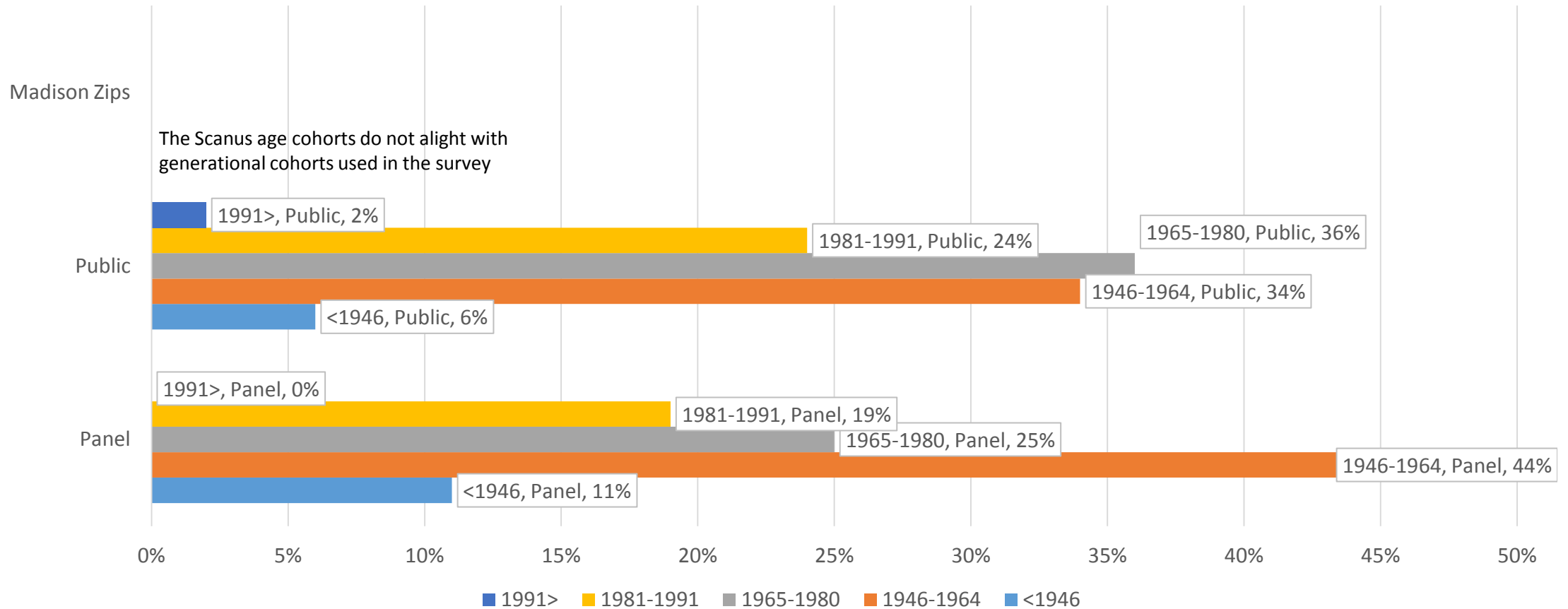


Women traditionally have been the food providers of the household and one would expect a higher participation rate by females in a survey on food shopping.

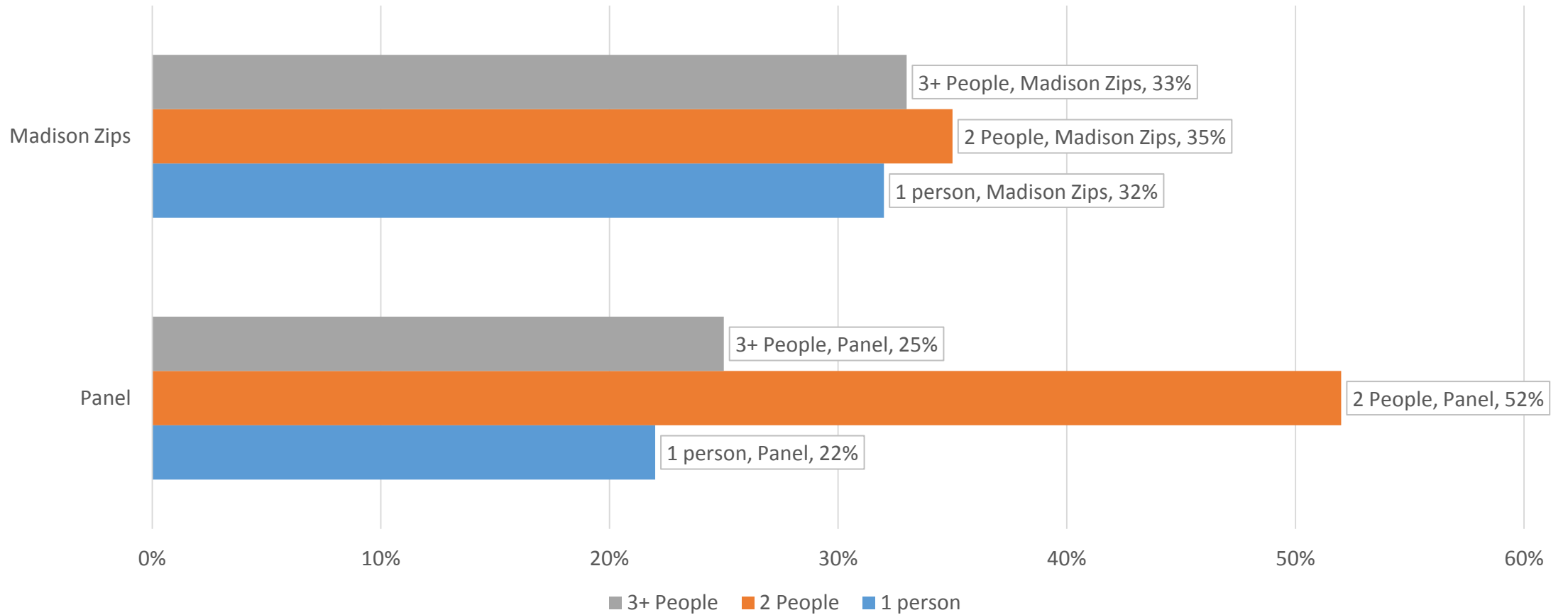
Question was not asked in the Public Survey

Generational

(< 1946 – Great Generation; 1946-1964 Boomers, 1965-1980 Gen X'ers, 1991> Millennial. The panel survey however excluded those born >1991)

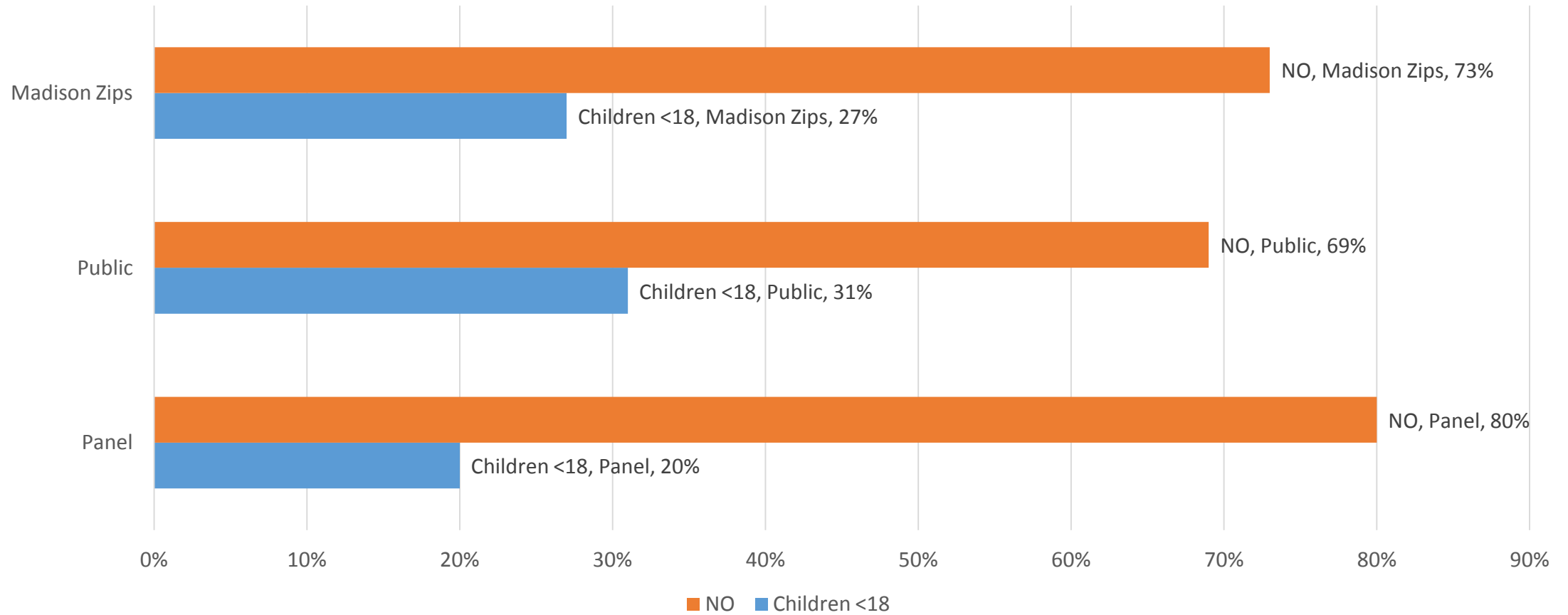


People in Household

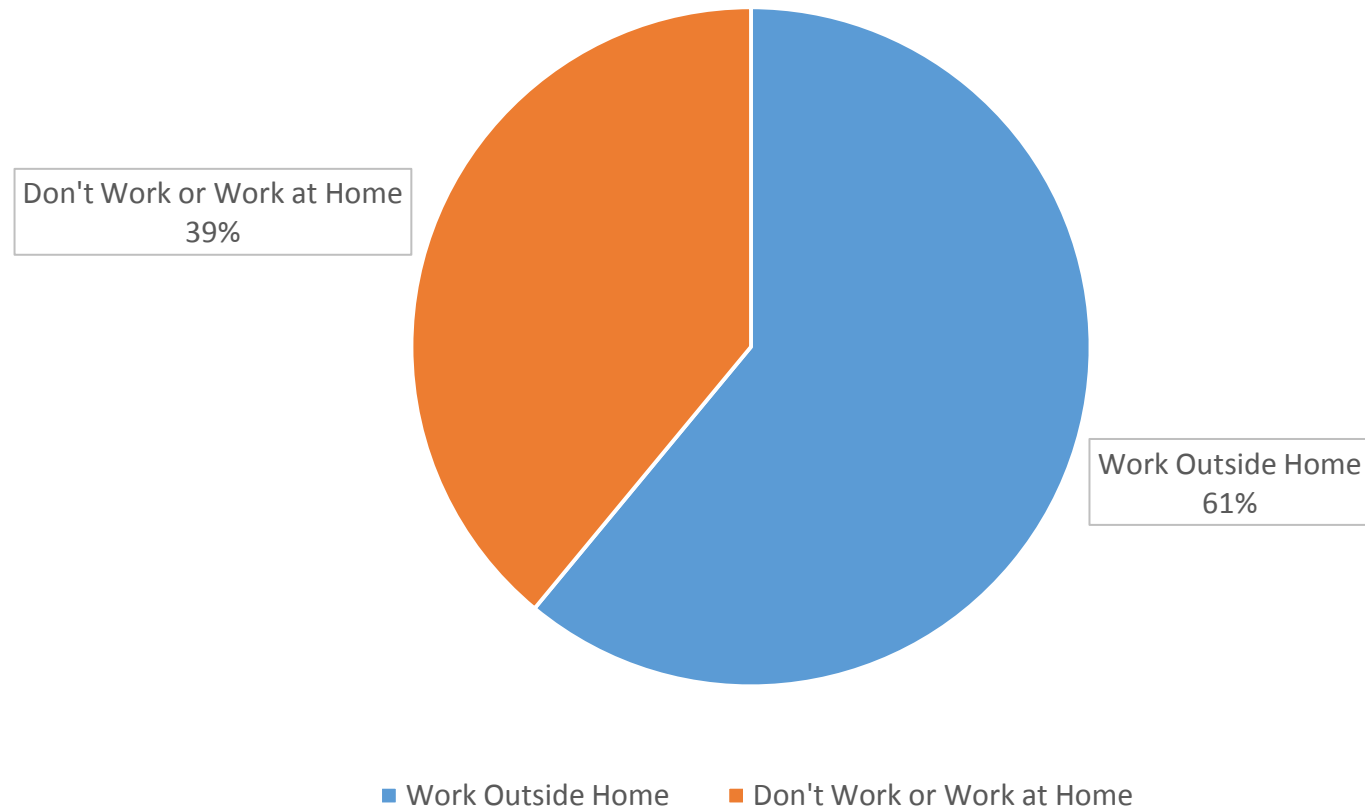


Question was not asked in the Public Survey

Children <18 years at Home



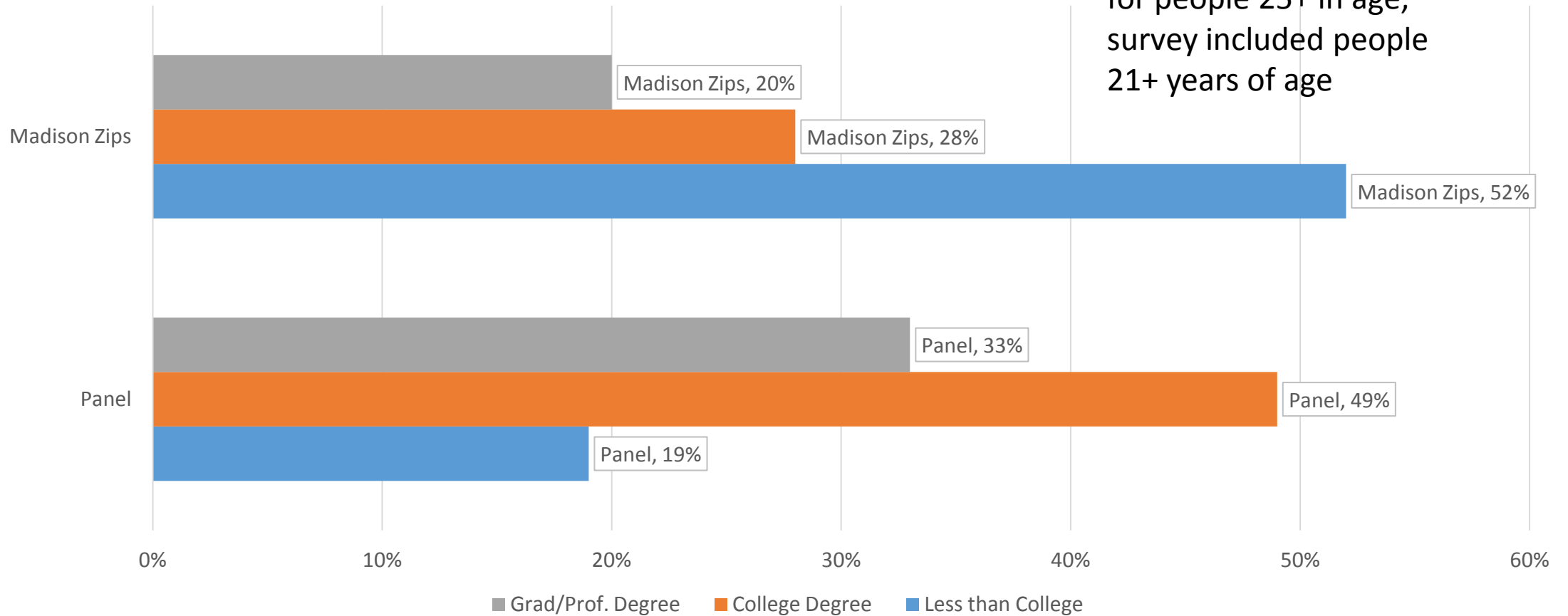
Work Outside of Home



Question was not asked in the Public Survey

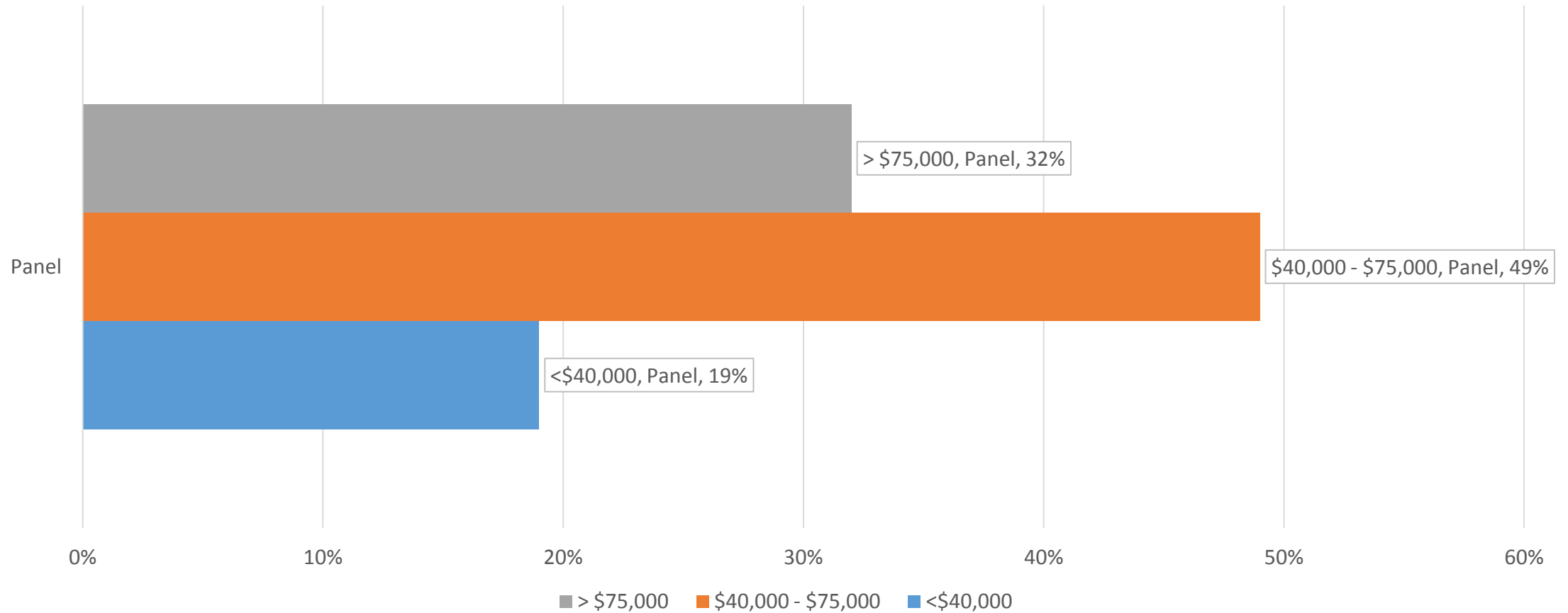
Educational Level

Education for Madison is for people 25+ in age, survey included people 21+ years of age



Question was not asked in the Public Survey

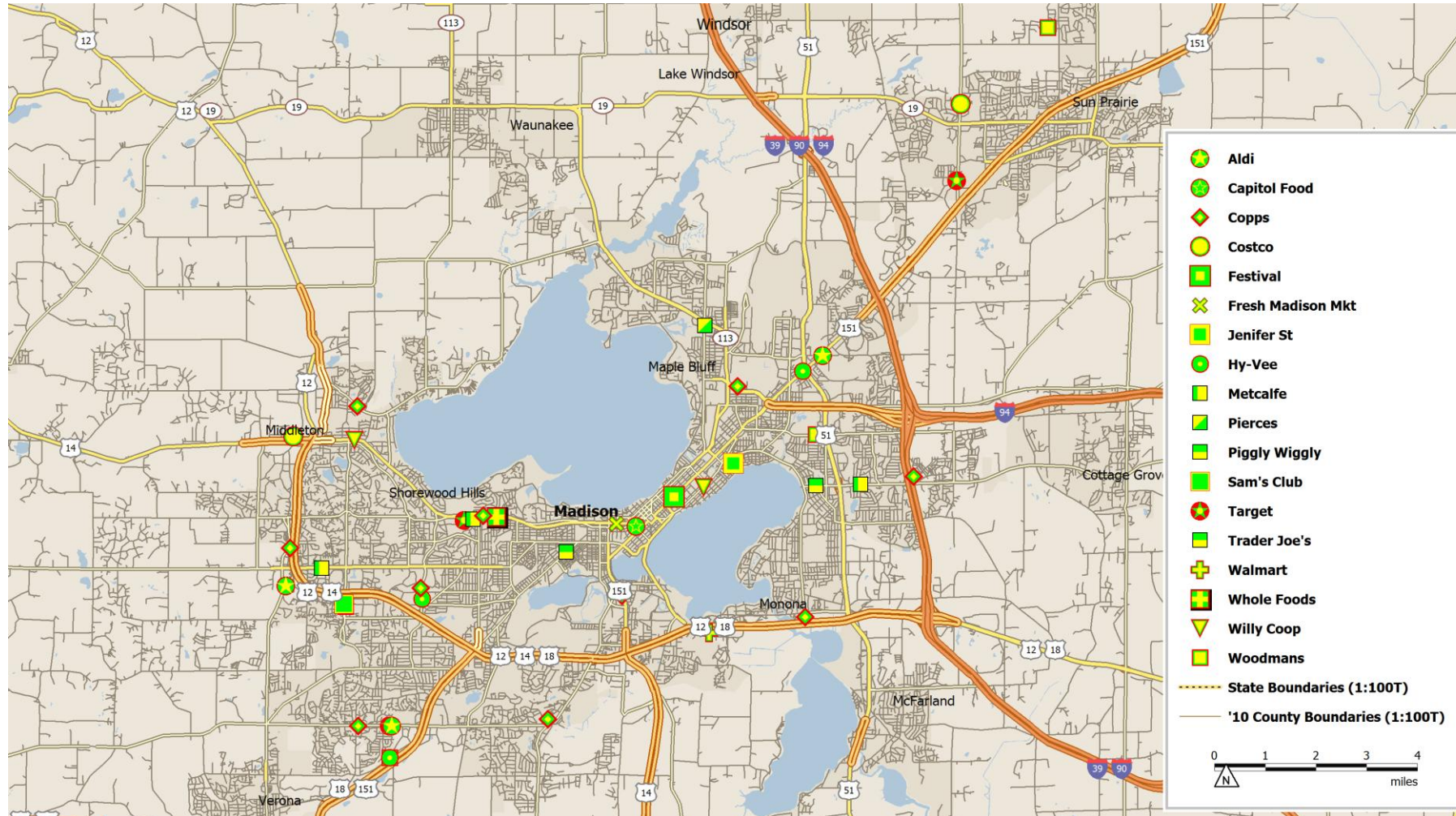
Annual Household Income



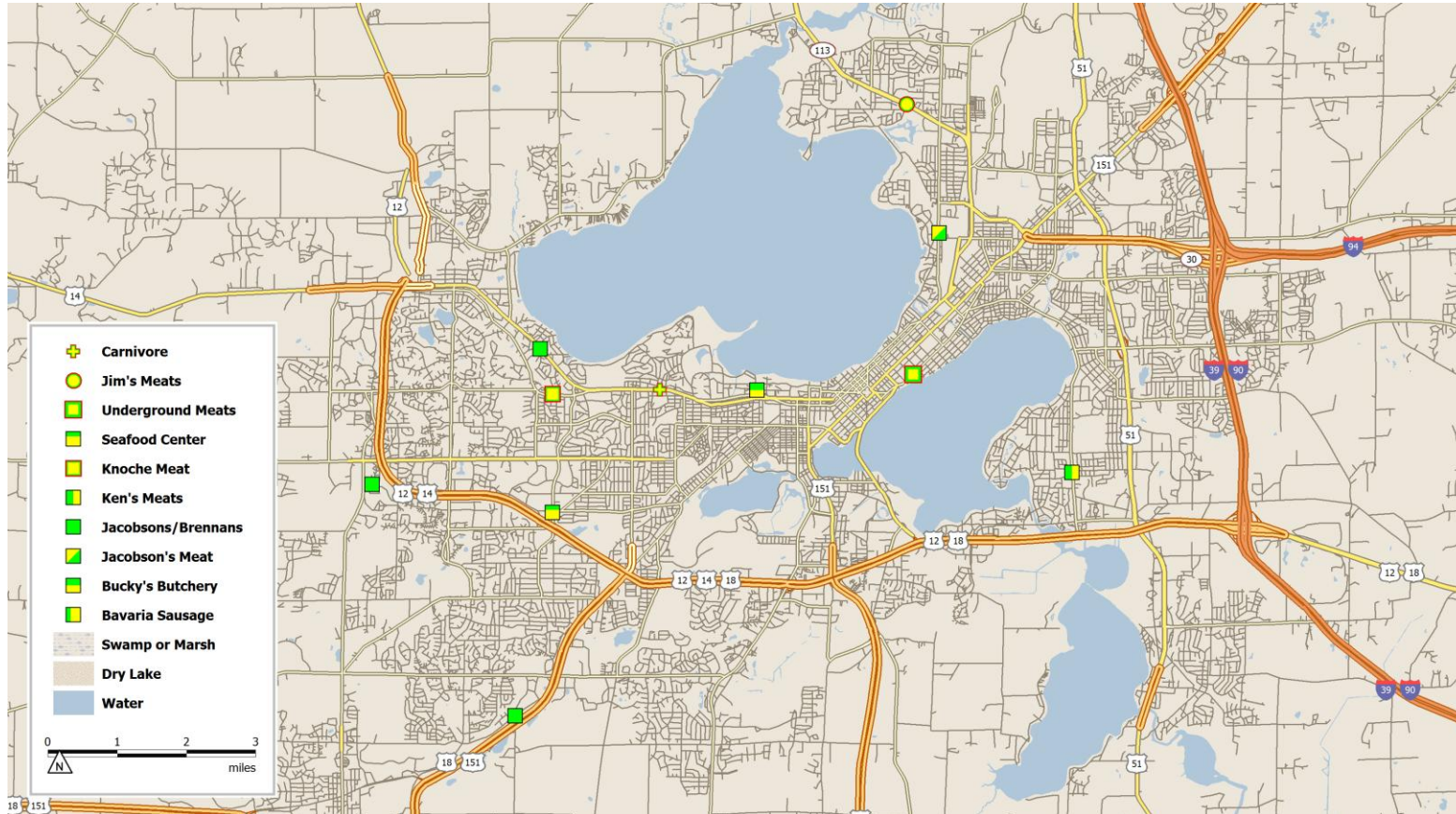
Scanus does not have comparable categories Household Income Data
Question was not asked in the Public Survey

Primary food stores in Madison

19 Grocers with 41 locations

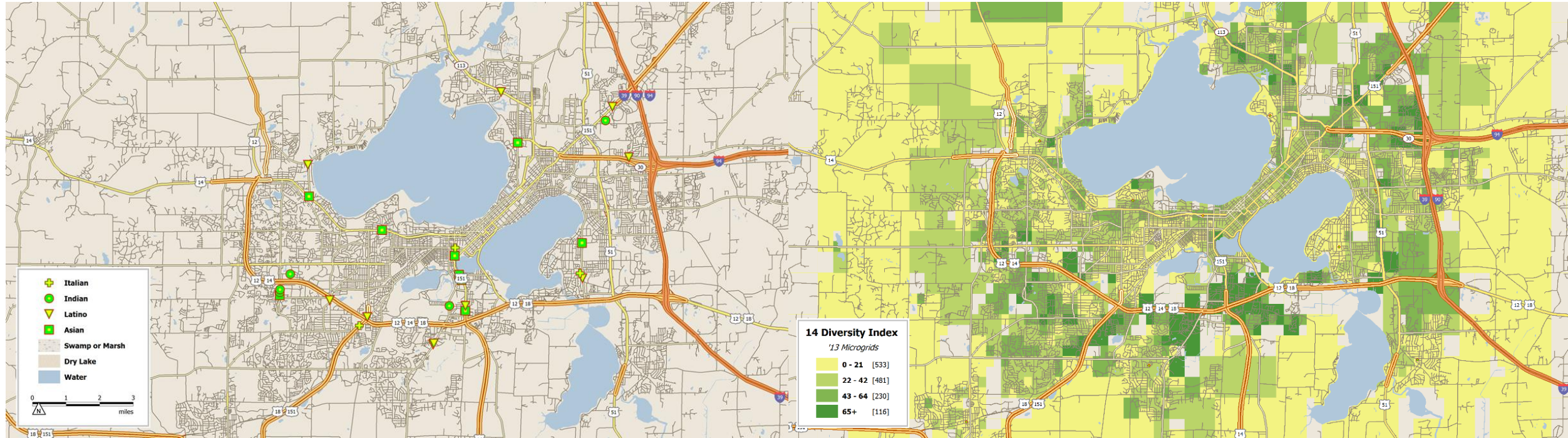


Specialty Food Store Locations



Location of Ethnic Food Stores

Diversity Index



Where do Panel and Public survey respondents shop for food?

Top 10 Panel Stores	% Shopping Weekly	% Shopping 2-3 times Monthly	% Shopping Less than Monthly	Top 10 Public Stores	% Shopping Weekly	% Shopping 2-3 times Monthly	% Shopping Less than Monthly
Woodman's	29%	27%	44%	Willy St Coop	22%	21%	57%
Copp's	27%	39%	34%	Woodman's	18%	24%	58%
Hy-Vee	9%	31%	60%	Copp's	15%	25%	60%
Metcalfe's	8%	21%	71%	Metcalfe's	12%	18%	70%
Costco	6%	24%	70%	Trader Joe's	10%	22%	68%
Target	6%	23%	71%	Hy-Vee	8%	21%	71%
Aldi	5%	11%	84%	Target	6%	26%	68%
Willy St Coop	4%	9%	87%	Jenifer St.	6%	10%	84%
Walmart	3%	12%	85%	Whole Foods	5%	13%	82%
Trader Joe's	2%	17%	81%	Costco	3%	18%	79%

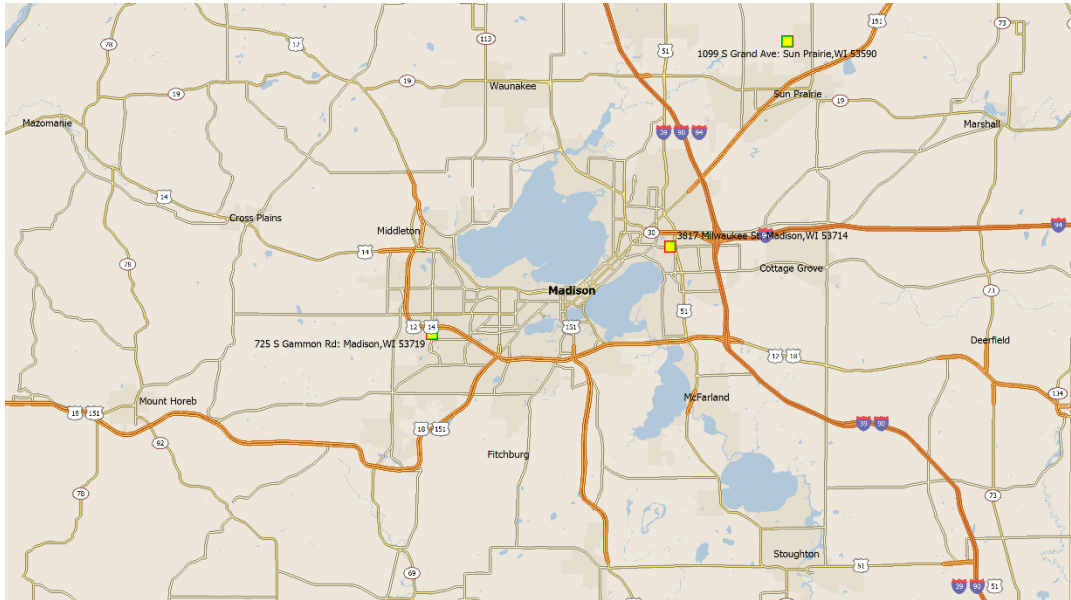
The shopping frequency from the Panel respondents, which is more representative of the public and the Public survey respondents, which are more representative of a Market customer have, with the exception of Woodman's , very different shopping patterns from each other.

Madison Food Shopping second tier stores

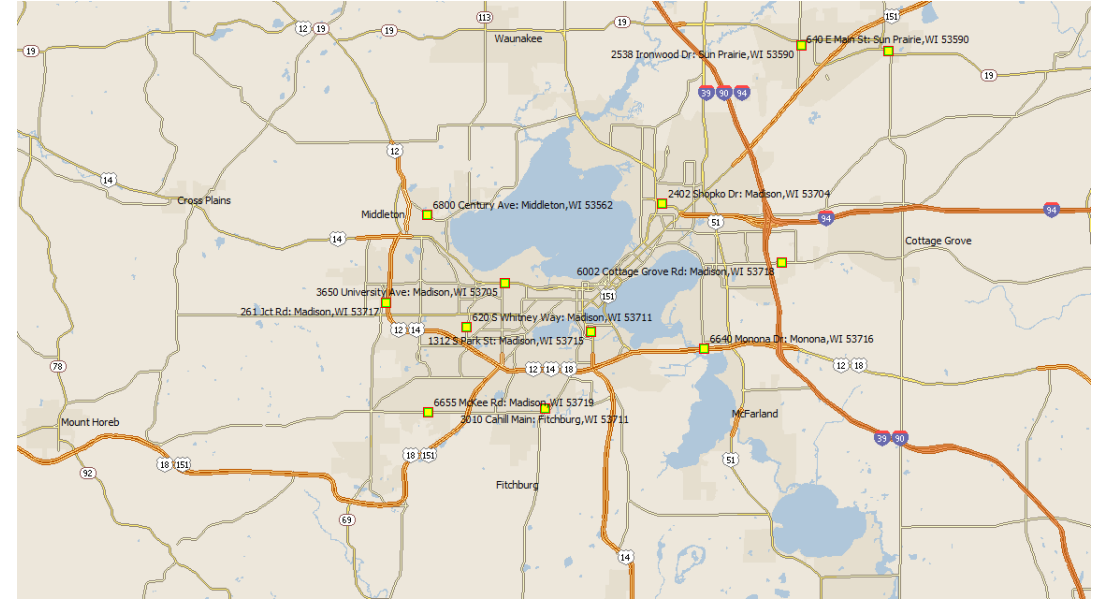
8 Remaining Panelist	% Shopping Weekly	% Shopping 2-3 times Monthly	% Shopping Less than Monthly
Whole Foods	2%	10%	82%
Brennan's	2%	8%	90%
Fresh Madison	2%	4%	94%
Sam's Club	1%	9%	90%
Specialty Stores	1%	9%	90%
Capitol Foods	1%	2%	97%
Seafood Center	1%	2%	97%
Jenifer St	1%	2%	97%

9 Remaining Public	% Shopping Weekly	% Shopping 2-3 times Monthly	% Shopping Less than Monthly
Specialty Stores	3%	16%	81%
Fresh Madison	2%	7%	91%
Aldi	2%	5%	93%
Pierces Market	2%	3%	95%
Capital Foods	2%	3%	95%
Brennan's	1%	8%	91%
Seafood Center	1%	5%	94%
Walmart	1%	5%	94%
Sam's Club	.4%	2%	98%

Woodman's (n=3) and Copp's Locations (n=12)



Woodman's Locations

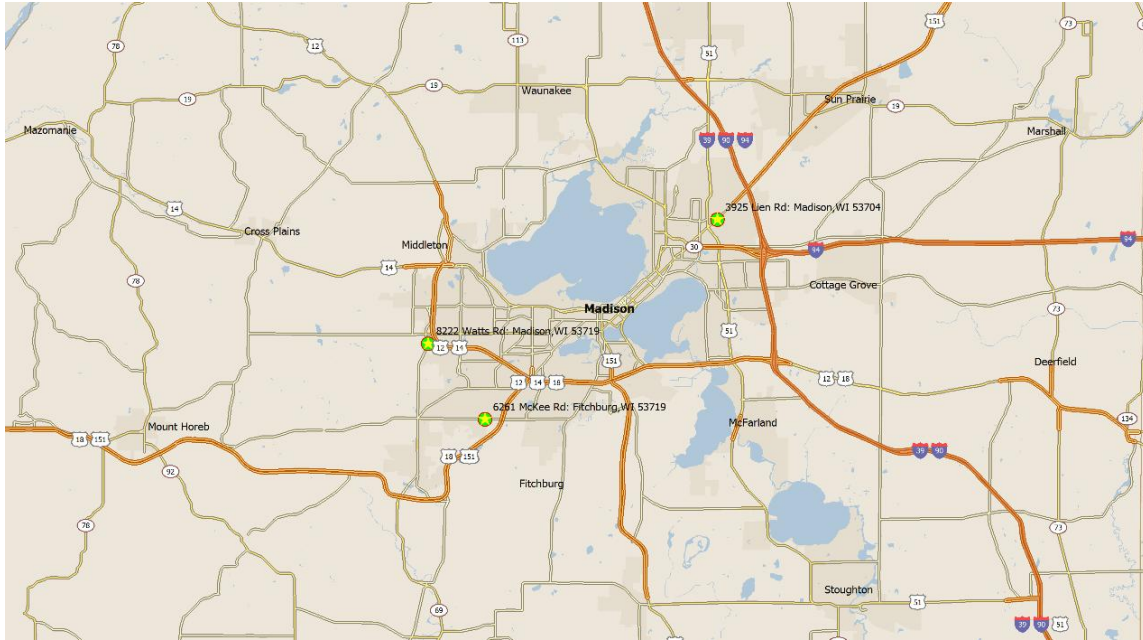


Copp's Locations

Size Does Matter: The Choice between Selection and Convenience - Woodman's was Madison's top food store in the Panel survey capturing 28% of the weekly shoppers and second in the Public survey with 18%. Copp's was second in the Panel Survey with a 27% share and third in the Public survey with a 15% share. A newspaper article reports that the average Woodman's has \$71.5 million in sales annually.

- Woodman's Location Model based on Large Selection:
 - 3 Stores with 634,218 square feet. Stores range from 197,298 s.f. to 225,000 s.f. with an average of 211,406 s.f.
 - The stores are 5 and 10 miles apart or 12 and 18 minutes
- Copp's Location Model based on Convenience:
 - 12 Stores in area with an estimated 587,498 square feet. Stores range from 26,381 s.f. to 71,585 s.f. with the average store 48,959 s.f.
 - Avg. 3.3 miles between stores or 9-1/2 minutes
 - Implied Trade area of 1.6 miles or say 5 minutes

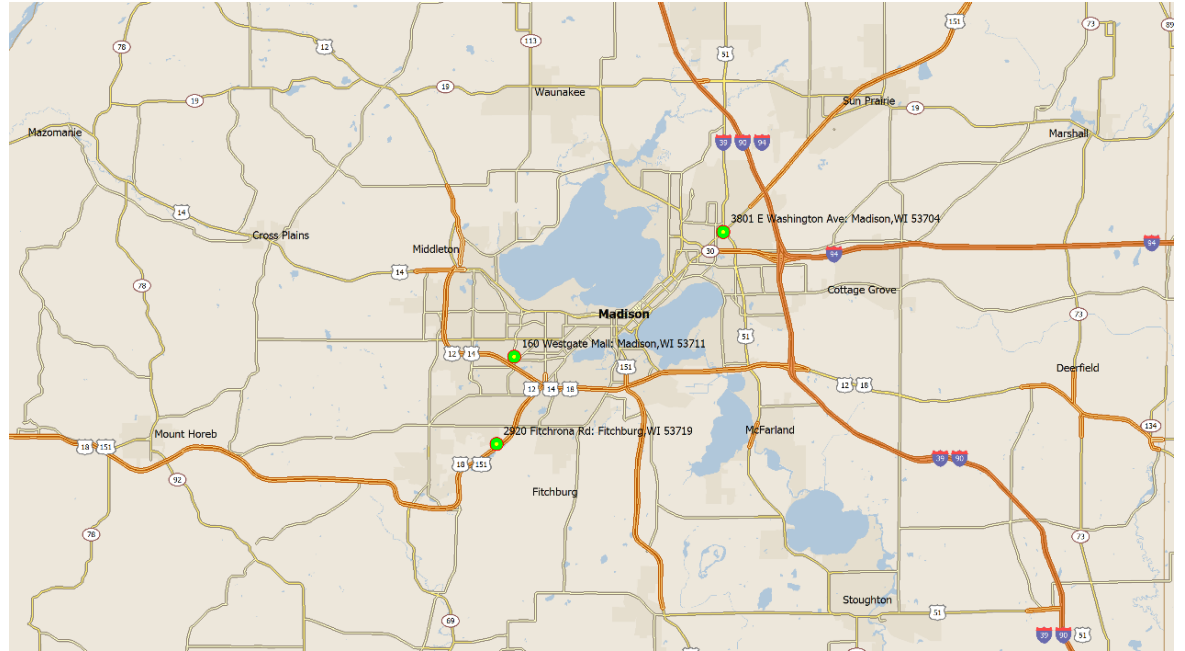
Price Does Matter: Aldi and Hy-Vee



Aldi has three stores and they are separated by 3.2 and 11 miles, with drive times of 12 and 20 minutes.

Aldi stores have a total estimated area of 47,858 s.f. with stores ranging from 15,066 to 16,782 s.f. with an average of 15,953 s.f.

Aldi stores are just a fifth of the size of Hy-Vee, but in the panel survey they garner 5% market share compared with 6% for Hy-Vee

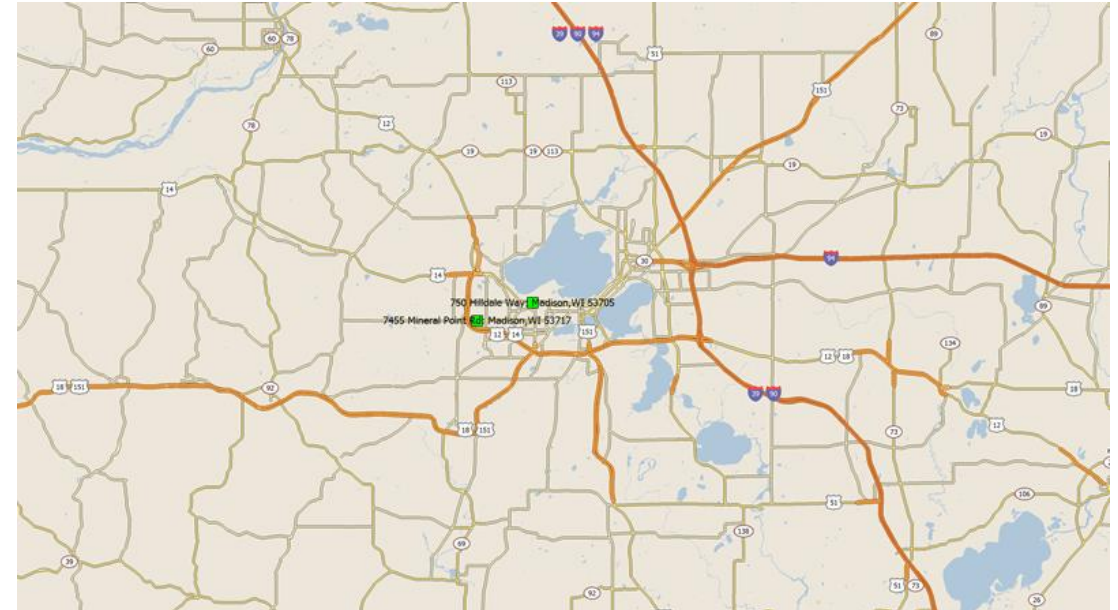
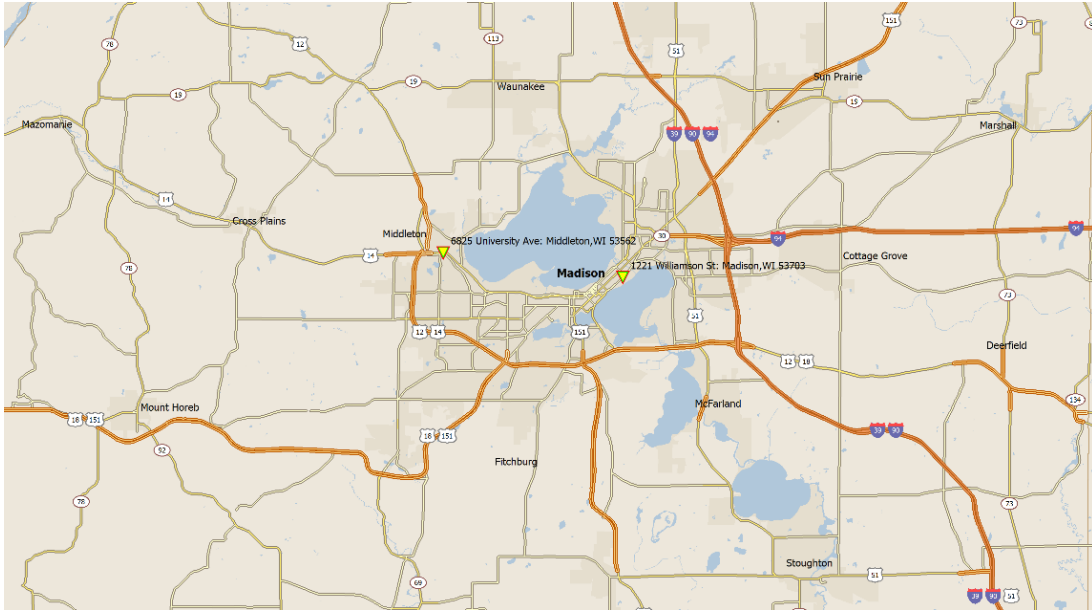


Hy-Vee has three stores in this market and they are separated by 8 and 3.6 miles with drive times of 9 and 19 minutes.

Hy-Vee's three stores total 233,556 s.f. with stores ranging from 65,000 to 85,556 s.f. with an average of 77,852 s.f.

Hy-Vee is looking for more locations.

Willy Street Co-op and Metcalfe's Market

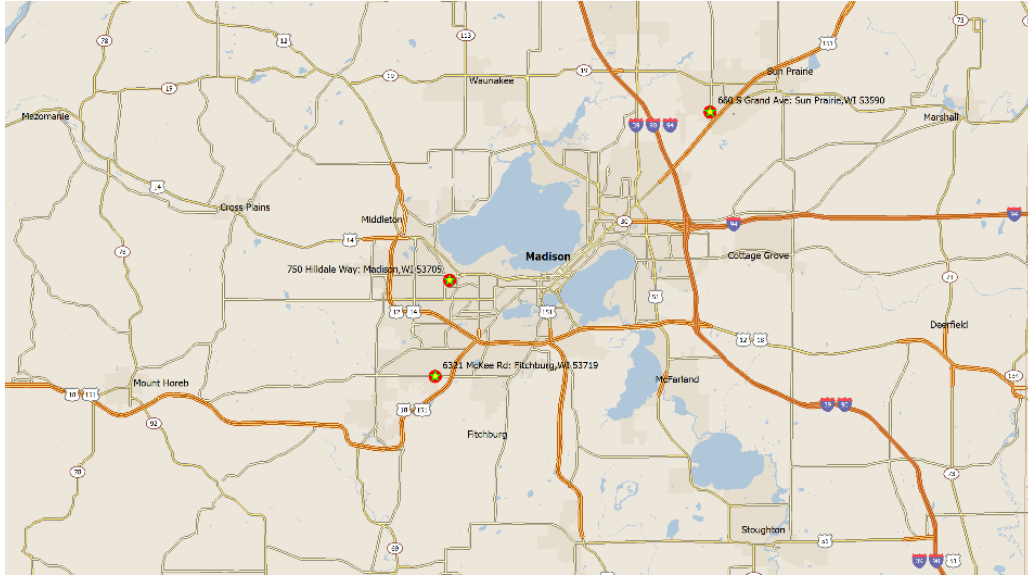


Willy Street Coop has two locations that are 6.7 miles and about a 19 minutes apart. The Williamson St. store has an estimated 20,000 square feet including a 5,000 s.f. preparation kitchen and catering. The University Ave. store has 12,369 s.f.. An article reports that the Coop has about 30,100 members and their Williamson St. store had 15,000 transactions weekly and their University Ave store had 8,600 transactions weekly. Sales at the University Ave. location, however, is reportedly growing quickly.

A late 2013 newspapers article report that Willy Street Coop has been looking for a 3rd location of about 10,000 s.f..

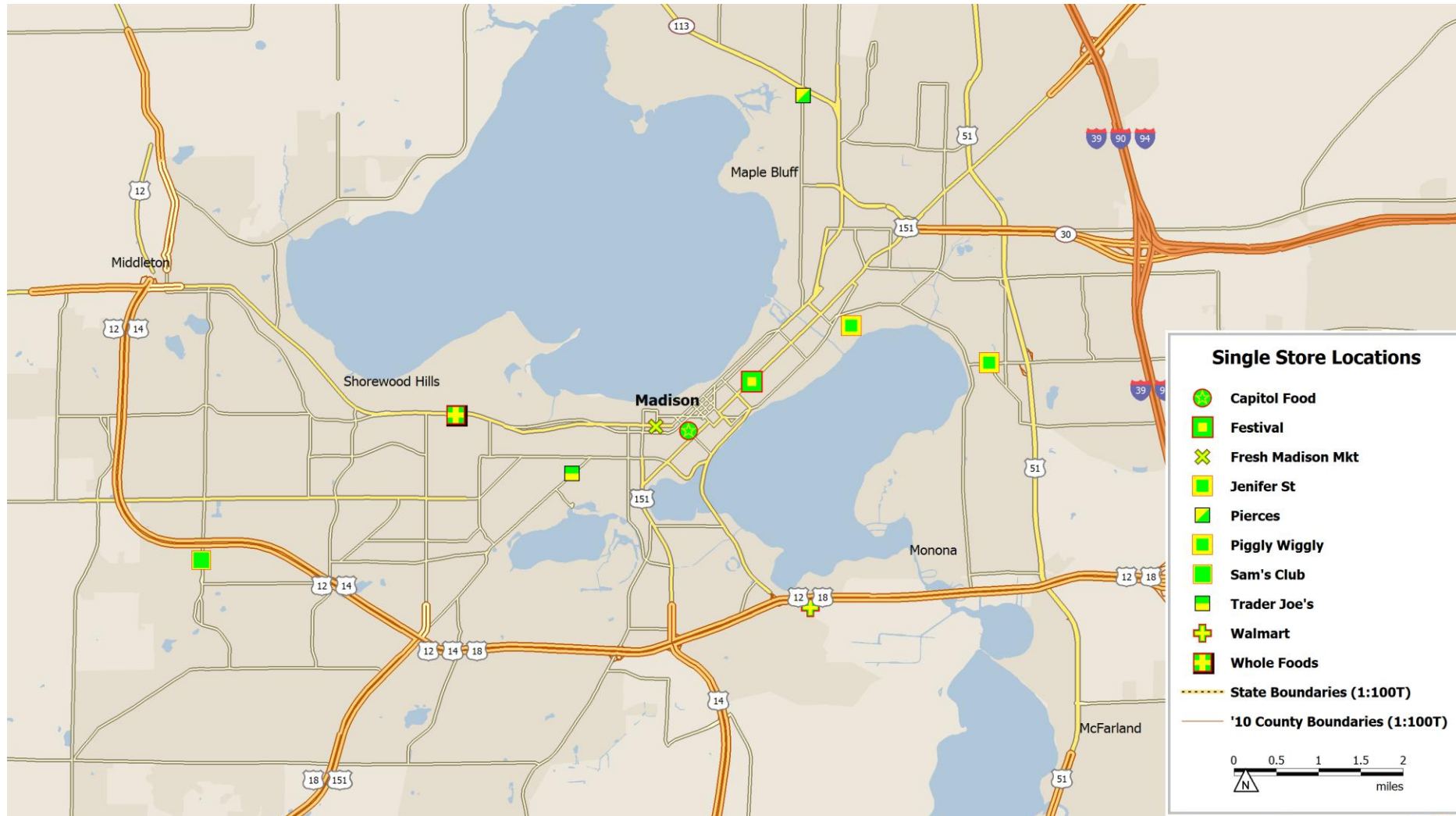
Metcalfe's has two stores in the Madison area. The two stores have an estimated total area 120,594 s.f. The two stores are approximately 59,832 sf. and 60,762 sf. The Metcalfe's at Midvale and Mineral Point Road are separated by a 9-minute drive time.

Target



Target has three stores that all have their P-fresh food concept. Targets food department is about 20,000 s.f. and including storage, about 30,000 s.f. or about 20% of their store. Industry estimates their sales at \$250K weekly. The three target stores 456,000 overall s.f.. and with 30% of area in groceries about 135,800 sf. The stores are 3.2 and 11.3 miles apart and in drive time, 11 and 26 minutes.

Single Store Locations



Dane County Food Employment and Establishments 2007 - 2011

	Employment			Establishments		
	2007	2011	2011 L.Q.	2007	2011	2011 L.Q.
Total Employment	255,574	249,353		13,531	13,179	
Ag Businesses	500	496	2.0	23	22	.66
Food & Bev Manufactures	4,136	3,753	.1.07	70	74	1.50
Wholesale Food	1,486	1,684	.85	69	59	.67
Grocery & Bev. Retail	5,063	5,056	.90	187	177	.69
Restaurants/Bev	20,686	20,783	.98	1,081	1,120	.94
Total	31,871 (12.5%)	31,772 (12.7%)		1,430 (10.6%)	1,452 (11.0%)	

Source: U.S. Dept. of Commerce County Business Patterns 2007 and 2011 and REPG

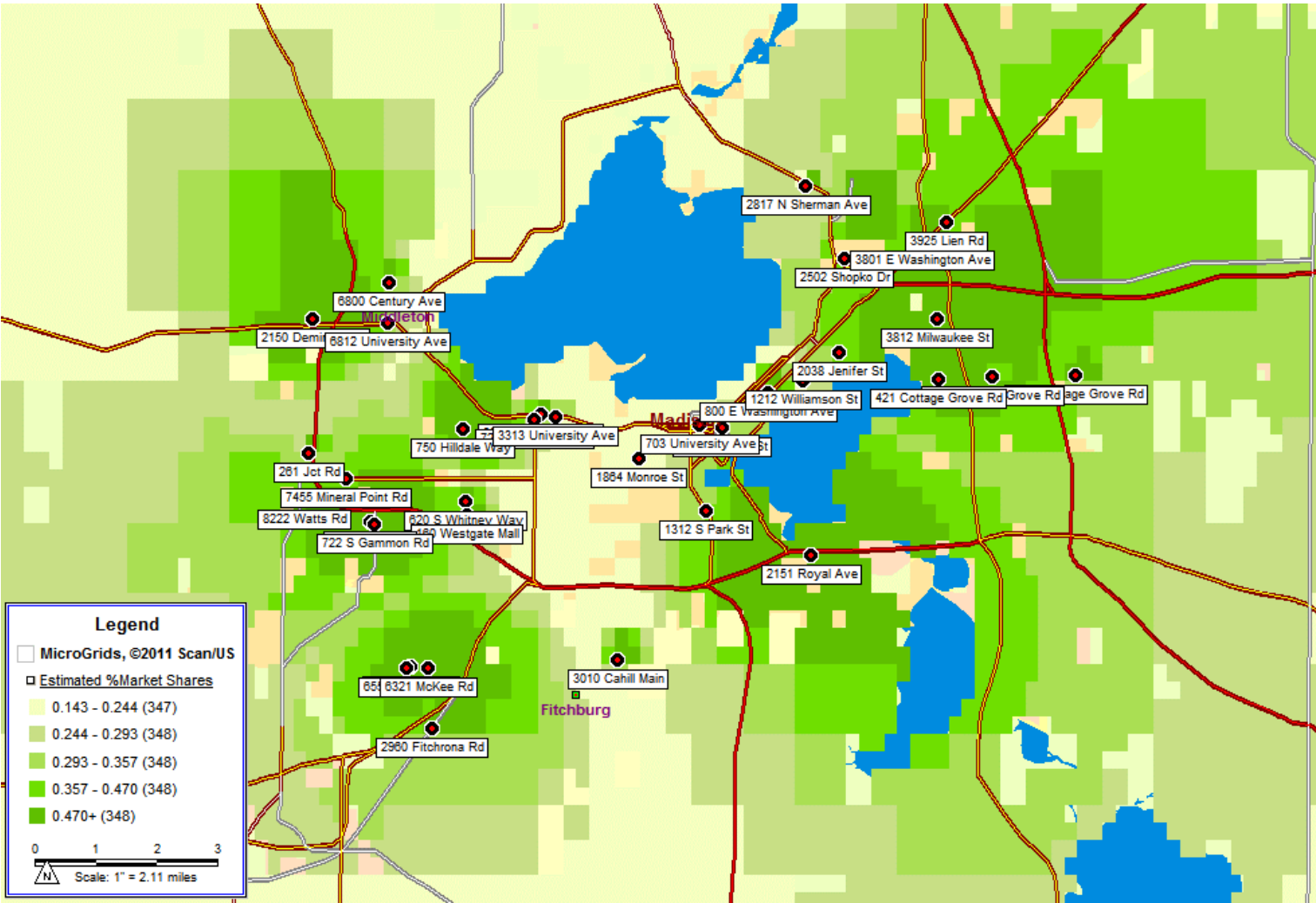
In food related business, Dane County has regained most of the loss resulting in the Great Recession.

The LQ column is the Locational Quotient, which is the proportion of Dane County jobs and establishments compared with U.S. distribution.

Dane County's employment is higher in Ag business, but it has fewer establishments. Food manufacturing has slightly higher employment but a significantly higher rate of establishments. The county is not a significant employer in food wholesaling and it does not have many wholesaling establishments. Its food grocery business was also low, but food service is similar to the U.S. levels.

The food wholesaling industry is centered in the larger cities of Chicago (150 miles away), Minneapolis (270 miles) and to a lesser extent Milwaukee (80 miles).

Gravity Model



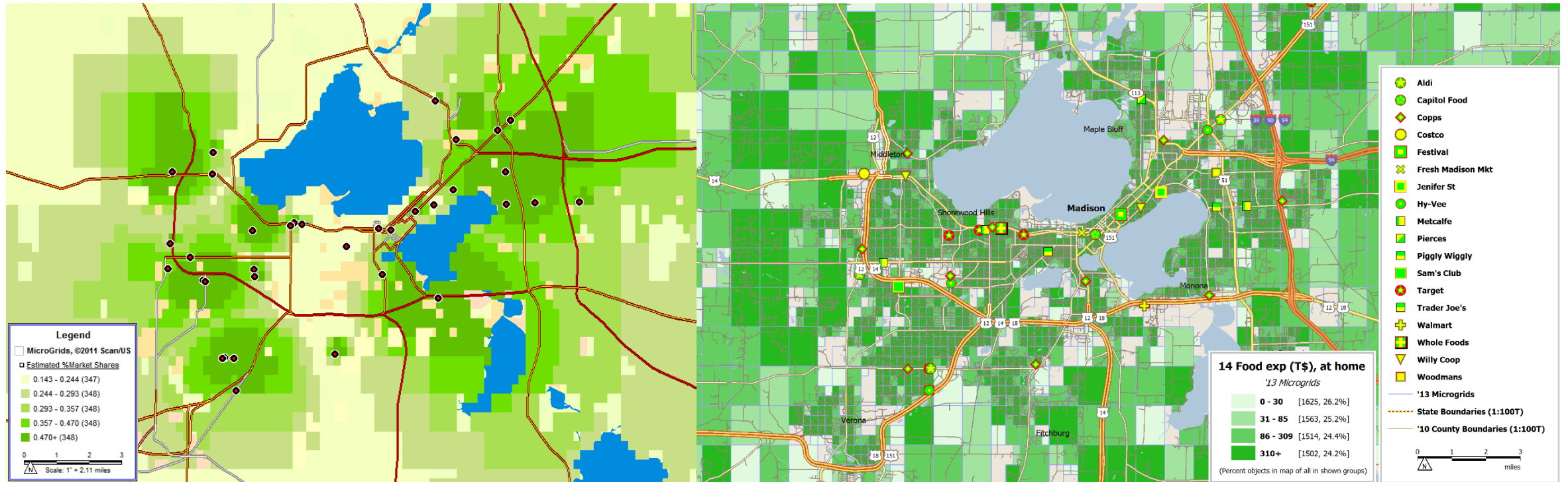
The gravity model measures the attractiveness of the store to meet a consumer’s needs and the ease of access to the store from a consumer’s location.

The model takes the size of the store as a measure of attractiveness based on the assumption that the larger the store, the more variety in goods offered is more attractive to the customer. The model also measures the distance to the store from the zone where the consumer lives. In this case “microgrids” which are similar to census block groups. The results of the model is a cumulative probability of store patronage for each store from the area shown in the map.

In the adjacent map, the darker shades show the highest concentrations of cumulative shares to a specific store in the meaning that customers living in these areas have high levels of potential from existing stores.

In Phase II, specific locations and trade areas will be set to measure the probability of patronage to specific sites and its primary trade area and will provide for more meaningful analysis.

Gravity model/food at home potential



Gross Food Potential

Demographic Profile			Gross Food Potential		
	City of Madison	Dane County		City of Madison	Dane County
Population	240,715	500,137	Food @ Home	\$398,810,000	\$867,040,000
Households	107,028	210,973	Bakery	\$37,800,000	\$82,638,000
Avg. HH Size	2.15	2.31	Meats	\$51,094,000	\$111,211,000
Med. Age	32.1	35.2	Poultry	\$13,987,000	\$29,850,000
Avg. HH Income	\$69,471	\$78,847	Fish/Seafood	\$10,519,000	23,077,000
Med. HH Income	\$53,433	\$61,239	Fresh Produce	\$47,742,000	\$105,056,000
College+ (pop 25+)	52.2%	45.8%	Food Away Home	\$260,556,000	\$575,071,000

The average household size in the U.S. is 2.55: Madison’s households are 16% smaller than the U.S. and Dane County are 9% smaller. Larger households spend more on food than smaller households.

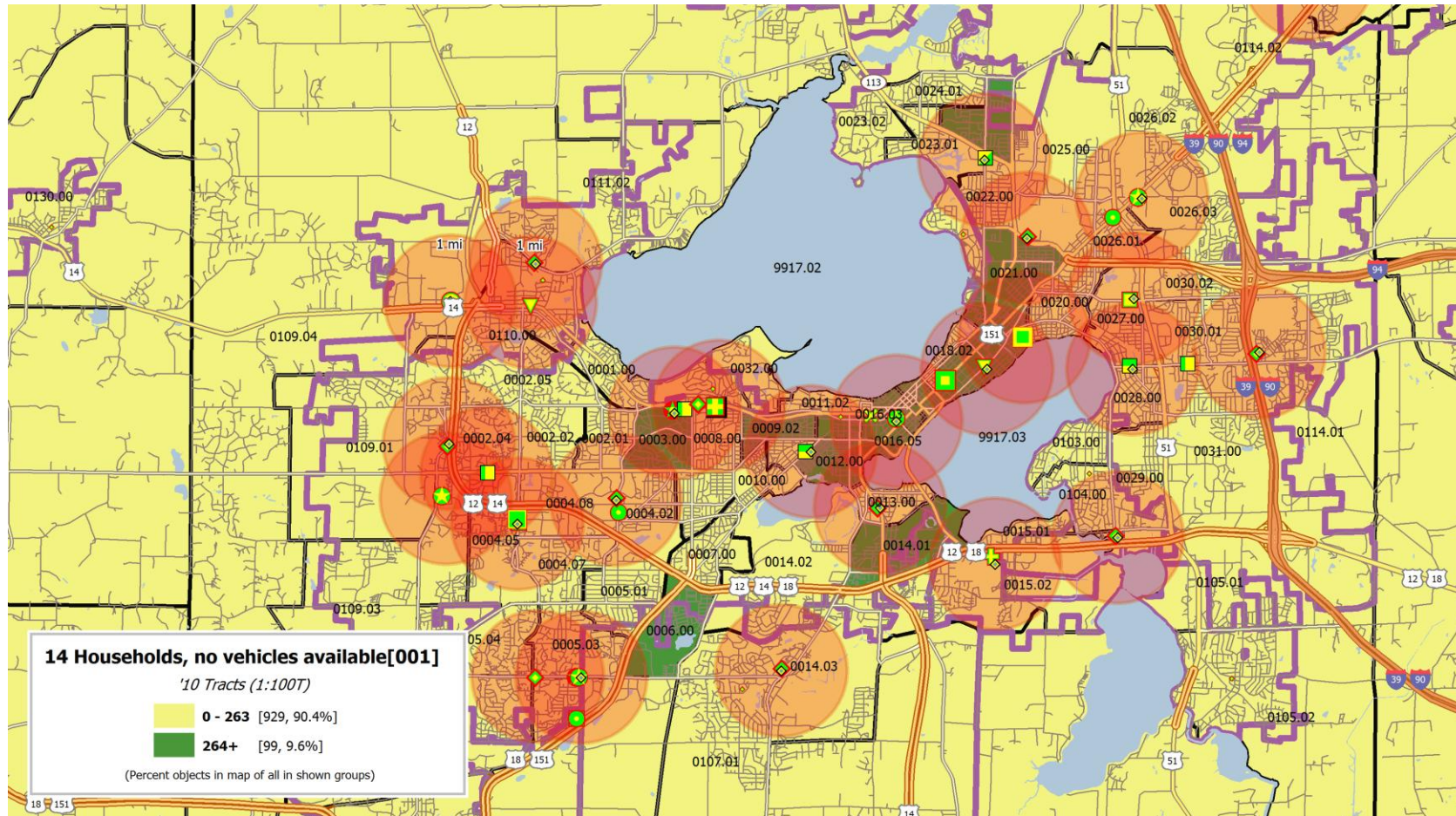
The average annual household income is \$72,869 and the median is \$53,958. Madison is 5% below the U.S., but overall, Dane County is 8% above. The median income for Madison is 1% below the U.S., but Dane County is 13% above.

The metric of educational level plays a role in explaining differences in food expenditures with College graduates spending larger amounts on fresh produce, for example. In the U.S. 28.3% of the population over 25 years of age has a college degree or higher, in Madison it is 52.2% and 45.8% in Dane County; Madison is 84% above the U.S. average and for Dane County it is 62%.

Median age in the U.S. is 37.4 years, Madison is 17% younger and Dane County is 6% - these reflect the influence of students.

The average food at home expenditure for the U.S. is \$4,494 per household, in Madison it is \$3,726 and in Dane County it is \$4,490. Madison’s food expenditure potential is 17% lower than the U.S. and Dane County’s average food expenditures is at the national norms. Expenditures based on age of head of household, household size, household income and region of country. (Source: Scanus 2014)

Most residents in Madison are within a mile of a food store



Most residents in Madison are within a mile a food store. However there are neighborhoods where residents are not covered as shown in the adjacent map. The USDA defines a “food desert” as census tracks that lack a food store within a 1-mile radius, has over 500 people, and where 10% ore more of the population lack access to a personal vehicle. Though many Madison neighborhoods have food access challenges, the adjacent map reveals that the Allied Community is the only part of the City that currently meets the technical definition of a food desert (track .0006, shown in green).

Food access is an important issue and this will be one of the issues to be considered in second phase of the study, as it proceeds.

Lifestyle Tapestry Segments

ESRI one of the GIS mapping companies provides demographic data that is segmented into 65 different lifestyles modes, which they call Tapestry.

On the following page is a map showing the dominant lifestyles in the census tracks around Madison.

The chart at right shows the top 8 segments encompassing 86% of the population. The numbers show the socio-economic ranking associated with the segment on a scale of 1 to 65 with 1 being the top socio-economic segment.

Enterprising Professionals (16) Young, educated professionals, either single or married with above average incomes. 16% of households. L2-Upscale/U3 high urbanization

Up and Coming Families (12) Youngest affluent segment. Above average incomes. 14% of households. L2 Upscale/U7 Suburban

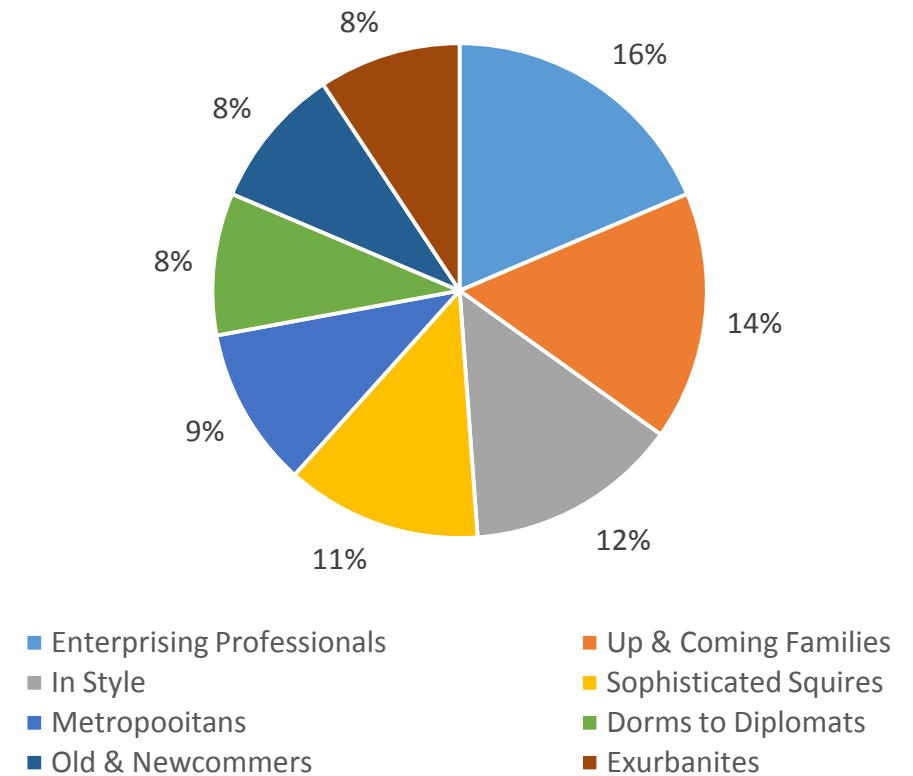
In Style (13) Live in suburbs, but prefer the city lifestyle. Professional couples predominate. Above average incomes. 12% of households L2 Upscale/U7 Suburban

Sophisticated Squires (6) High income households that accept longer commutes for country life. 11% households L1 Upscale/U7 Suburban

Metropolitans (22) Younger single and married families who live in urban areas. Highly educated, but not particularly wealthy. 9% households L3 Metros/U3 High urbanization

Dorms to Diplomats (63) Students. 8% households L3 Students/U4 dense

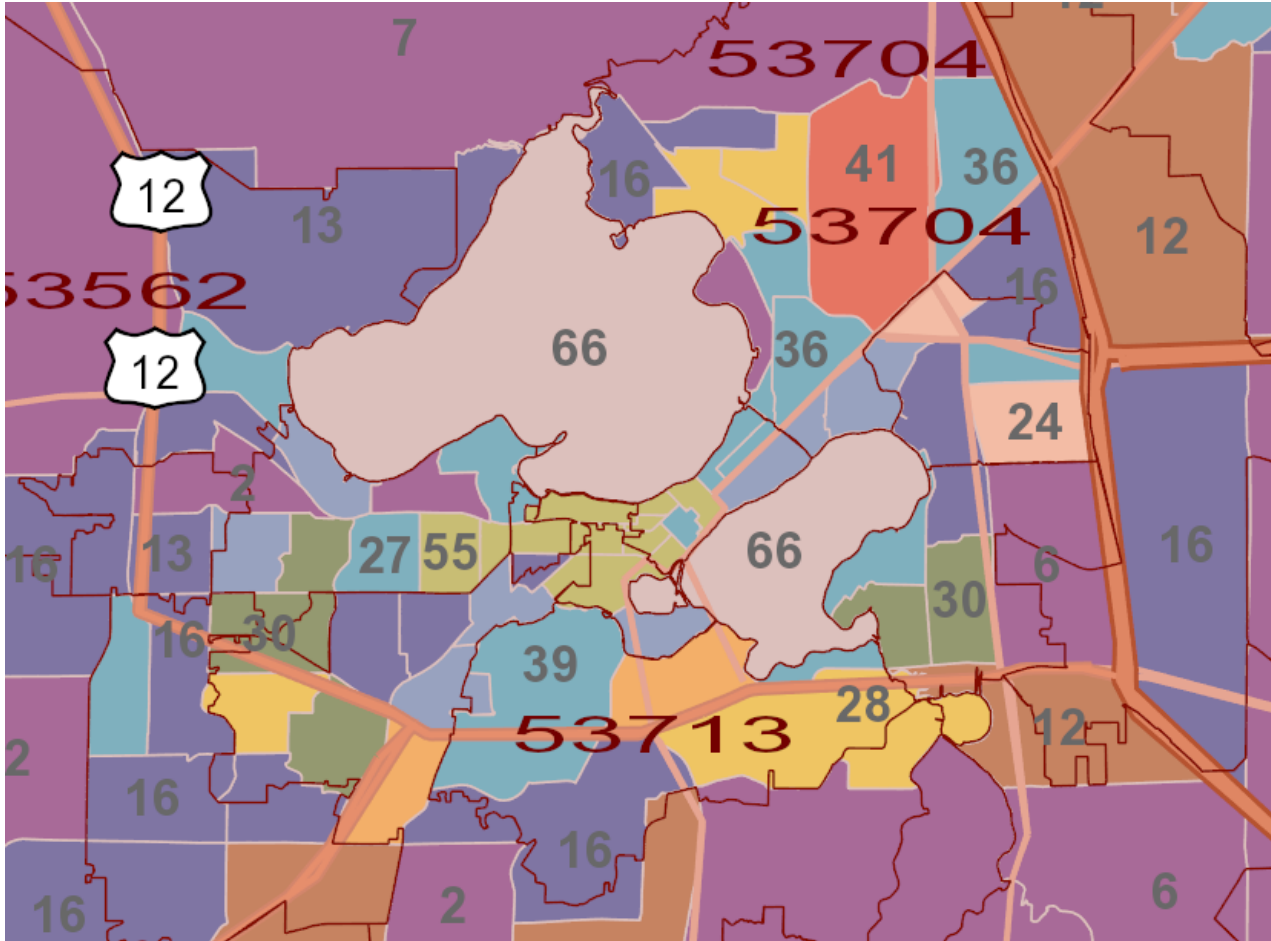
Lifestyles



Old & Newcomers (36) Transitional areas with those beginning their careers and those retiring. Below average income. 8% households L4 Singles/U4 dense urban.

Exurbanites (7) Affluent lifestyle in open spaces beyond urban fringe many are empty nesters and hold significant jobs. Above average incomes. 8% of households L1 Wealthy/U7 Suburban.

Dominant Tapestry Lifestyle



Adjacent map shows the dominant Tapestry Lifestyle by Census Tract in the Madison area. The two digit numbers inside the tracts are associated with the following Tapestry Lifestyles:

- 2 – Urban Splendor
- 6 - Sophisticated Squires
- 7 - Exurbanites
- 12 – Up and Coming Families
- 13 – In Style
- 16 - Enterprising Professionals
- 24 – Main Street USA
- 27 – Metro Renters
- 28 – Aspiring Young Families
- 30 - Retirement Communities
- 36 - Old and Newcomers
- 39 - Young & Restless
- 41 - Crossroads
- 55 – College Town
- 66 - Unclassified (Water)

Madison Food Stores by Chain with Gross Area Estimates

Store	Location	Gross Area
Aldi	3925 Lien	16,792
Aldi	6262 McKee	15,066
Aldi	8222 Watts	16,000
Capitol	111 N Broom	12,363
Copps	3650 University	40,000
Copps	6002 Cottage Grove	58,000
Copps	620 S Whitney	66,145
Copps	640 E Main SP	60,700
Copps	6555 McKee	55,888
Copps	6800 Century	44,000
Copps	1312 S Park	26,381
Copps	2502 Shopko	71,585
Copps	261 Jct	51,299
Copps	2538 Ironwood SP	60,000
Copps	3010 Cahill	54,000
Festival	800 Washington	50,000

Store	Location	Gross Area
Hy-Vee	160 Westgate	83,000
Hy-Vee	2960 Fitchrona	65,000
Hy-Vee	3801 E Washington	85,556
Jenifer St	2038 Jenifer	9,903
Fresh Madison	703 University	18,000
Metcalfe's	726 Midvale	60,762
Metcalfe's	7455 Mineral Point	59,832
Pierces	2817 Sherman	21,729
Piggly Wiggly	205 N Holiday	38,250
Piggly Wiggly	421 Cottage Grove	37,000
Trader Joe's	1864 Monroe	12,500
Whole Foods	3313 University	35,628
Willy Coop	1212 Williamson	15,700
Willy Coop	6812 University	12,369
Woodman's	3812 Milwaukee	197,298
Woodman's	722 S Gammon	211,920
Woodman's	151/Grand SP	225,000
	Including Sun Prairie	1,887,666
	Excluding Sun Prairie	1,602,666

The Madison area has seven traditional supermarket representing 26 stores and another seven single unit supermarkets bringing the total to 33 stores. These 33 stores have total area is 1,909,196 gross square feet and an average area of 49,218 sq. ft. The stores range from 9,903 sq. ft. to 225,000 sq. ft.

In addition to these traditional supermarkets, Madison also has four other large sellers of food: Costco, Sam's Club, Target and Walmart. These four chains have seven locations. This brings the total number of large food stores to 40 in the Madison area. These stores have large footprints and some like Costco and Sam's also have a large wholesale component. The total area of these stores is 2,191,953, say 2.2 million square feet.

Non-Traditional Food Stores

Store	Location	Gross Area	Food Area
Costco	2150 Deming	153,000	61,200
Costco	Hoepker SP	154,000	61,600
Sam's Club	7050 Watts	106,000	42,400
Target	6321 McKee	175,000	52,500
Target	660 S Grand SP	130,000	39,000
Target	750 Hilldale	151,000	45,300
Walmart	2151 Royal Ave	203,393	81,357
Subtotal w/SP		1,072,393	383,357
Without Sun Prairie		788,393	282,757

The lines between what is a grocery store are blurred with major retailers like Walmart Supercenters, Target, Costco, and Sam's Club selling food in addition to other non-food retailers like drug and dollar stores. Area measurements are for building, not sales area and the food area are guestimates based on industry reports and observation.

Our estimate of gross area of the large box and traditional supermarkets in Madison, excluding Sun Prairie, is 2,191,953, say 2.2 million square feet.

What shoppers look for when choosing where to shop for food

In choosing where to shop for food, how much do the following strongly influence where you shop?	Panel	Public
Very Convenient	69%	64%
Has Low Prices	63%	39%
Has Highest Quality	44%	60%
Good Selection of Locally Grown/Produced Products	25%	53%
Good Selection of Specialty and Ethnic Foods	18%	35%
Good Selection of Organics	12%	42%
Personal Service	12%	18%
Good Selection of Freshly Prepared Foods to Take Home	11%	16%
Introduces me to New Food	4%	18%
Place to Eat and Meet with Friends	0	5%

Profile of those who are strongly influenced by good selection of locally grown made Products

The panelist who were strongly influenced by locally grown or made products proportionately shopped more at Metcalfe's, Whole Foods, and at the Willy Street Coop. These shoppers are also proportionately more likely to buy organic products and wanted a good selection of prepared foods. They also wanted a good selection of specialty and ethnic foods. They are interested in personal service and don't like self-service meats, want highest quality, and are not as influenced by price.

They liked to shop in the Hilldale Mall, Westown, and Atwood areas. They also visited other markets more often and had visited the Milwaukee Public Market. They were proportionately more interested in community gather spaces.

Demographically, they were proportionately more represented in the Baby Boomer generation.

Profile of lower income customer

In the Panel survey, we also cross-tabulated the results of participants that earned less than \$40,000 annually. This customer was statistically differentiated from the entire panel in that there were a higher percentage of single households, and fewer had graduated from college. More importantly this segment said that locally grown or made products had a stronger influence on where they shopped for food and that they were more time sensitive in the amount of time they were willing to travel to the market.

Word Cloud: What could your primary food store to serve your needs better?
(panel survey)



What could your primary food store to serve your needs better?

(sample panel responses)

na

my primary store have a pretty good selection and quality meats and produce but their prices on some regular grocery items are higher than a neighboring market. I end up visiting two stores. Their prices on general items should meet or beat other stores.

More variety on ready to eat products.
more sodium free products
More organic food to select from

More local food would be best--I see a lot of local produce but no local meat, for example.

More healthy offerings
more gluten free cooking ingredients (I avoid processed foods)
more fresh fruits and veggies available year round
More food samples in store
More discounts!
More checkout lines open. Better deli.
minimize clutter
Metcalfe's does an excellent job of providing what I need.

Meats low in fat. Good produce (local when available). Good choices in terms of carry-out options.

Make more attempts to stock and label low sodium. And heart healthy food
Lower salt products.
lower prices of organic products.
lower prices
Location and ease of in/out is most important.
Little change
larger selection
keep shelves stocked
Keep produce fresh and if not fresh, remove from shelves/counters
Keep prices low, especially on beef
keep prices low

I think my primary food store would do better were it to attend to the produce section more. Oftentimes, there is produce out for sale that is way past its prime. This makes it unattractive to customers and might serve to spoil other produce.

I prefer to buy in season locally produced and organic if possible foods. No GMOs
Improve the produce selection

I eat much more homemade from scratch meals which I prepare myself so I buy much more fresh veggies and meats. Brennan's is my favorite for fresh veggies and secondly coppers.

I do not have a 'primary' food store due to the fact that no single store is able to provide all of the things I need (at competitive rates). I regularly visit 4 - 8 food stores to get everything I need. Therefore, the only thing that could be improved by a primary food store would be to have everything I need in a single place at the best prices, which honestly, is unrealistic.

Identify if foods contain genetically modified ingredients.

I care more about the food I purchase and purchase much less that is pre made. We cook almost everything from scratch and like high quality products at good prices. I also like to know the people I am buying stuff from. People at our favorite stores don't necessary know our names but recognize our faces and make an effort to say hi, how are you doing?

I care more about the food I purchase and purchase much less that is pre made. We cook almost everything from scratch and like high quality products at good prices. I also like to know the people I am buying stuff from. People at our favorite stores don't necessary know our names but recognize our faces and make an effort to say hi, how are you doing?

I'd say my primary store serves my needs quite well.
Highlighting local products and produce more
have more of a variety of diet foods. More new products
Have more nutritional information on foods readily available.
have in stock the things I am looking for, or are advertised sales
Have a variety with fair prices.
Have a large stock of advertised items

Have a better selection of prepared foods that are fresh and good tasting, easy to bake off or heat(reheat), etc Also, change up the selections regularly or have certain items rotate daily i.e. meat loaf on Monday, pork loin Tuesday, etc.

Greater selection of low or no salt foods.

good quality, grown locally if possible, grown in USA, do not have foods from China (safety a concern), reasonable prices

Give impression of being cleaner.
Fresh produce and meat at reasonable prices

First and foremost: organic products, grass-fed beef, nitrate-free pork, wild-caught seafood. These items are often very expensive to buy, so I'd like to see the cost even out a bit. We have budget for this type of food, but giving up a vacation is better than putting bad stuff into our bodies. I also love buying locally produced products.

Display produce more attractively.
discounts
Continue to offer a wide variety of fairly priced options.
Check the condition of the cucumbers more often.

Changing the layout of the store is NOT helpful. I like to find the items that I am accustomed to buying in their usual places. Change for the sake of change doesn't help me.

Carry more lower carb, higher fiber, low fat food for diabetics!

Carry Hills Brothers Coffee, Have more Bakery Specials (Discounts) in late afternoon, early evening.

Bring produce prices down
better selection of produce.
Better quality produce
better prices for the same items that are found at other stores as well as this one

Better fresh vegetables, better choice of meats, actually HAVE the things that are on special

Better directions about where to find things
Be more consistent in offering truly fresh produce.

Arrange the store so that basic items-produce, meat, dairy canned goods, basic paper products and frozen foods are grouped together and that the pet dept, baby dept, beauty dept, card dept are not in the middle of it. It would save time and steps for those that never use those departments.

always keep low
add more locally grown/produced items

Word Cloud: Main reason for shopping at farmers market rather than their primary (panel survey) food store



Reasons they shop at farmers markets (sample panel responses)

The Farmers Market I actually shopped the most are the ones in the Middleton area. I shop them because it's straight from the source, no middle man, so the cost is usually lower. I like supporting local farmers and everything I've ever bought has been terrific.

I shop regularly at the weekly Stoughton Farmer's Market for the fresh locally grown food
Locally grown, organic, good quality foods

I don't like crowds around the capitol, can't remember when more convenient ones take place

You can get local produce (I prefer organic and seek out those farmers/farms) at reasonable prices. It is convenient, the money stays local and supports local farms, and you get to know the farmers.

freshest seasonal produce
fun

Like to support local farmers.

Local, organic products

Good prepared foods to eat there

I like to support local growers, and the Hilldale market is very near a family member's apartment.

We shop for local fruits and vegetables, plus other items like maple syrup, at the farmers market because we like to support the local farmers.

local fresh produce, organic, lower prices, better quality., support community

Fresher produce, local foods, enjoyable outing.

Happened to be downtown for another reason

don't shop

vast variety of foods

I love the fresh fruits and veggies that are locally and often organically grown.

To get outside and walk

I shop primarily at the local farmer's market since everything sold has to be home-grown or homemade. On a rare occasion I shop at the Hilldale or downtown Capital Square Farmer's Market.

Variety and fresh items. Good to buy local.

I wanted buy local

Fresh local foods and it is recreational too

Convenience, fresh vegetables...

Support local, pick up community supported agriculture box for week

Convenient for fresh products

Fresh home grown vegetables.

Home grown

organic, wide variety and fresh

Fun and very fresh food

Change of routine -an outing

ambience of an open air market - ability to interact with farmers

Supporting local farmers, fresh produce, cost, taste, quality

Its an event. Lots to see, can pick the fresh produce I want and can talk to the people who grew the produce.

I prefer farm-fresh food. A secondary reason would be lower prices.

We see the people who produce the food, our money doesn't go through a middle man, we are supporting the local economy, we're conserving fuel and gas in what we purchase (it didn't have to go far to get to us), we can walk to the farmers markets in our neighborhood enjoying the beautiful Madison summer, we often run into friends and acquaintances at the market. There is a fun and festive atmosphere at the market.

The money stays local and supports local people and community. Even if a food store is locally owned, it might source products from elsewhere. Shopping at the Farmers Market means supporting area farmers.

It is just so nice to get straight from the producer stuff

It's nice to shop outdoors and see and interact with the producers of the food. The atmosphere is fun and unique. It's an experience.

they had good homemade jam

local produce...especially corn

Have a good relationship with some of the vendors at the Northside Town Center market

fresh, local veggies and fruits

fresh produce/location

I can find much fresher vegetables

more local ingredients

freshness - and to check out the products offered

To support my local grower.

Specialty food items from local vendors that is fresh and cheap. Also it's the ambience in general

Enjoy the outdoors

We usually look for kale (or Swiss chard), beet roots (and greens) and in season squash, onions and cabbage. Except for kale, these are usually available in grocery stores, but just not as fresh.

Very convenient.

It's fun and the produce is fresh.

support local farmers and have extremely fresh local products

People watching

Looking for specific items that the grocery did not carry.

locally grown

Community atmosphere and variety in sold produce.

fresher produce!

support local farmers

They have merchants/vendors not available at the local food stores. The products are fresh.

festive atmosphere

help community

because it is convenient (near my house), a fun experience, and very high quality food

I like giving my money directly to the food producers.

Fresh and homegrown produce.

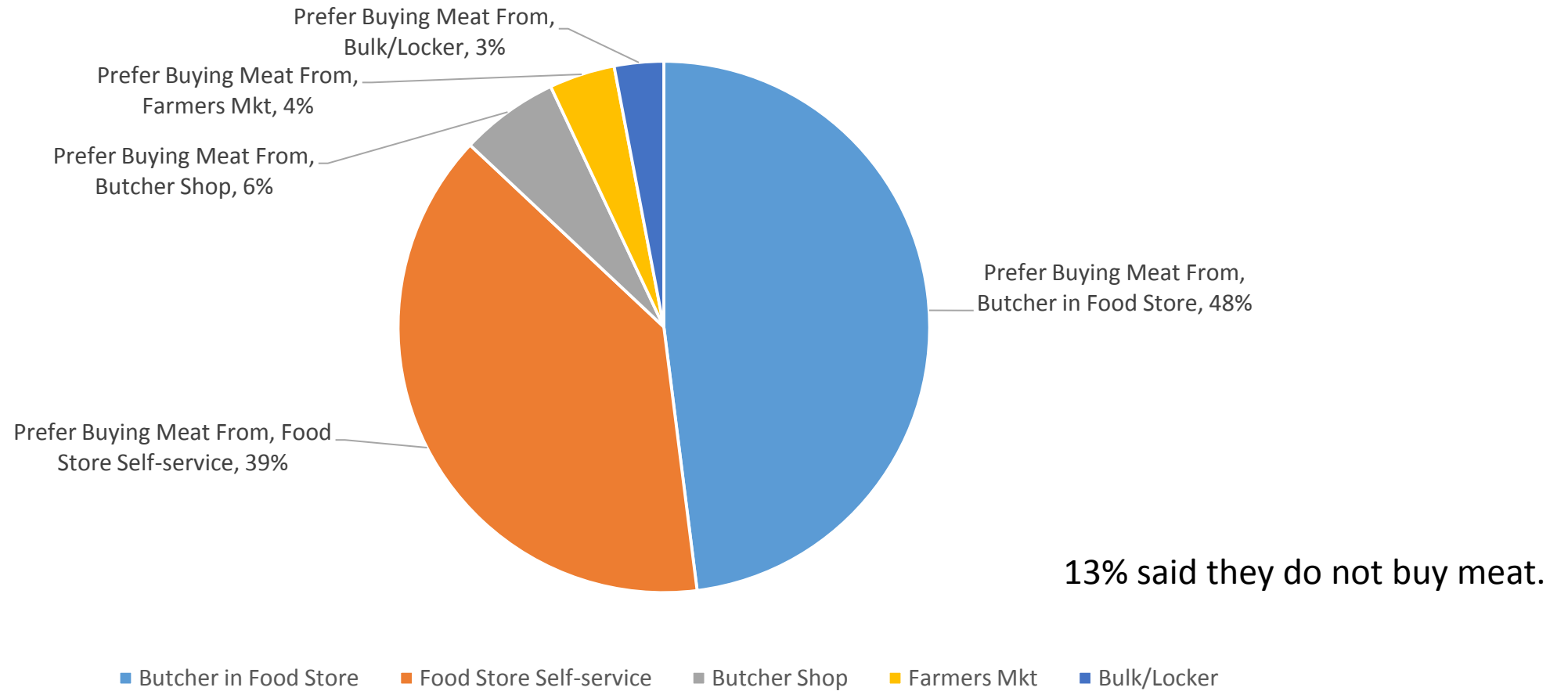
Shopping at Butcher Shops

Butcher Shops	% Panelist Visiting in past 60 days
Jacobson Bros. Meat & Deli	12%
Jim's Meat Market	8%
Ken's Meats and Deli	7%
Bavaria Sausage	4%
Knoche Butcher	3%
The Conscious Carnivore	3%
The Underground Butcher	1%
Bucky's Butchery	1%

Panel Survey: 28% of the Panelist went to a butcher shop in the past 60-days.

Public Survey: 19% of the Public Survey visited a Local Butcher Shop/Meat Market in the past 30 days.

Where do you prefer to buy your meat?



Farmers Markets visited in 2013

	Panel	Public
Downtown Farmers Market on Capitol Square	63%	81%
Downtown Farmers Market on Martin Luther King Jr. Blvd	21%	46%
Westside Market DOT or Hilldale	Hilldale: 17% DOT Parking: 18%	40%
Eastside Jennifer St Market	10%	27%
Capitol View Far Eastside Market	15%	12%
Southside Labor Temple, Villager Mall or Rimrock Markets	Labor Temple: 8% Villager Mall: 14% Rimrock: 7%	13%
Northside Market	13%	23%

Visited one of these markets in 2013

The Farmers Markets where they spent the most money in 2013

Farmers Market	Panel
Downtown Capitol Square Saturday	53%
Hilldale Mall Saturday	9%
Westside Hill Farms DOT Saturday	8%
Downtown MLK Wednesday	7%
Monona Sunday	5%
Northside Town Center Sunday	4%
Capitol View Wednesday	4%
Hilldale Mall Wednesday	4%

Farmers Market	Panel
Fitchburg Thursday	2%
Gilbert Rd Wednesday	2%
Jennifer St Tuesday	1%
Rimrock Monday	1%
Villager Mall Friday	1%
Labor Temple Sunday	0.4%

Word Cloud: How can farmers markets meet your needs better? (panel survey)



What would make their farmers market better (sample panel responses)

more selection!
Provide some kind of shopping cart to carry purchases.
Offer lower prices
Can't think of anything
I have a large garden and enjoy growing my own produce in summer.
can't think of any way they could better meet my needs.
Have more vendors

No problems with the farmers market, except that the price is higher -- but in general, the quality is higher too.

no thoughts

Be located where there is more room
better prices
Lower prices.
better variety and close off the street it is crowded

I would LOVE to eat organic but can't afford to...keep prices affordable! Would be happy to buy dirty, blemished, seconds produce.

offer rabbit meat
keep prices low

Have a map showing the booths and what is available for each. Somehow make it easier to go around--people stop in the walking lane and just chat making it very difficult to get around them.

More selection, bargains on "seconds" for canning.
Sun Prairie Market is just the right size
none
Stop pretending the goods are premium from grocery stores. "Grown Locally" is not worth extra money. It should be cheaper since there are no transportation costs.
My needs are met at Farmers market

Between the Wil-Mar market and the Dane County market, I do pretty well. Also "Sorry, you cannot continue until you correct the following: Issue 1 Please answer this question." It specifically said to skip the question if I don't buy meat, but it won't let me skip.

Increase the variety of offerings at the farmers'markets closer to the west side of Madison. Lower the prices to compete with supermarket prices.
They are fine as is.
Offer free parking
The few times I've gone by one, the parking has been atrocious. I also tend to forget they exist, so maybe better marketing - email reminders that you can sign up for from a central site?
this isn't an improvement but a reason why I don't go - I don't like crowds and carrying items isn't always easy for me as I have a bad back and arthritis
pretty good as is
More variety
Good as is.

I don't buy meat and yet I cannot continue unless I fill in the meat buying question. I will fill in but disregard.

better hours
I feel prices are to high. Originally it was said prices could be more reasonable because food didn't have to travel so. Far I can find much produce cheaper at stores.
I am happy with the vendor I deal with.
everyday farmers market!!
Like it the way it is.
Group like vendors in one location
They do just fine.
Offer a farmer offering milk. We loved it when Blue Marble was at the Westside Market.

I can't say that they necessarily better meet my needs, but the whole experience is quite pleasant, especially when the weather is nice. The main reason I like the farmers' market is because the produce is less expensive and very good and fresh.

good selection, reasonable prices
More visible
None. (Also, I tried to skip the meat question above, as indicated since I don't buy meat, and was unable to proceed without answering it.)
fresh

You can select the quantity and quality yourself of your produce. Plus, helping local farmers.

ability to use credit cards at each vendor
Longer hours would possibly lessen crowding

Focus on food products, the plant items (especially those that are only ornamental) aren't what I look for at these markets.

They are meeting our needs now.
organic and fresh stuff

Physical layout - gets so crowded after 9 a.m., can't get into stalls I want to visit, and can hardly stop when I want to.

Better parking situation
better prices
lower prices
Larger space so that they are less crowded.

Locally grown is a MUST! Best to have organically grown, but I'll settle for locally grown since I know it's picked when ready, not weeks before. I also prefer to support the local growers financially.

Fine as is.
I know that the food is local and the meat is high quality

Parking closer to the stands. It is difficult to lug all your purchases to where your car is parked. How about shopping carts?

Nothing comes to mind
Maybe a few more vendors giving a little more selection
I forget to go, not a habit I've developed.
More fruit

Winter Farmers Market Places

	Percent Visiting Market Since November 2013
Dane County Early Winter Market at Monona Terrace	10%
Late Winter Market at Madison Senior Center	7%
Northside Town Center Winter Market	6%
Fitchburg Community Winter Market	4%

Panel respondents who visited markets:
81% visited a single market 1 to 2 times last year
16% visited a single market 3-4- times and
3% visited a single market 5+ times

Word Cloud: What would make the winter markets better? (panel survey)



What would make winter markets better (sample from panel survey)

with gasolibe costs, I don't save money driving to these events

I have not been to any of these

More marketing; I was not aware of most of them until very recently, which is a shame.

Just not interested

the senior center is too small

more vendors

They should move the food eating line further away from the vendors. It is hard to get to the ones right by the line. (This is for the Madison Senior Center.)

none in my neighborhood, but not sure whether they would fulfill my main reason for shopping the summer market (fresh seasonal produce)

Not interested

They are meeting our needs.

I accidently hit the Dane County markets, when in reality I only stopped at the Capitol Square Farmer's Market in November, primarily because I had a meeting and stopped afterwards.

More advertising of their times.

I wasn't aware that Fitchburg had a winter market! I'll definitely check it out.

I LOVE the winter market thanks to the breakfasts. They are a huge draw even if the amount of produce is much lower during the winter. The location is not ideal because parking can be tricky but I would rather that it stay more centrally located than go somewhere far away from me that is easier to park at.

The Madison Senior Center Market is too small and cramped.

no suggestions

better publicize what is offered - I didn't know about the Fitchburg winter market and don't know when it is.

It was a very cold winter, just not convenient to go.

be in my neighborhood

na

The Dane Count winter markets I have visited are so crowded it is an unpleasant experience, so I stopped going.

lower prices

have some soup to go maybe. a little bit bigger. I know there isn't much produce but maybe other things to eat

N/A

I haven't been in more than 3 years - but it seemed small and not enough variety back then

no

Id rather go to the farmers market when it is nice outside and I can walk around

later/extended hours in case of bad weather

Good as is

have wider variety

N/A

only went a couple of times since there didn't seem to be many vendors there

Lower prices

nothing

Nothing, it is just too hard to bundle the kids up in the winter to go

I thought the winter market was good the last time there and not certain I could improve upon it at this time.

varieties

Nothing needs to change. My needs are already met.

Better location.

none

more variety

More winter veggies!

nothing

Not sure, you can't make a local strawberry appear in February.

The one at the senior center is usually very small, and they don't have a good selection

I do not shop farmer's markets.

would prefer something near the west side.

wegweg

It is hard to have a large variety of locally grown food in the winter in Wisconsin

Nothing comes to mind.

CSA usage and satisfaction with location

	Panel CSA Members (n=49)	Panel Extremely Satisfied (n=49)	Public CSA Members
Someone Else's Home	30%	53%	60%
Work	22%	80%	14%
Farmers Market	16%	50%	11%
At Farm	12%		
Retail Store	12%		
Home	2%	none	6%
Parking Lot	2%	none	10%

Panelists: 13% subscribe to CSA

Public: 25% subscribe to CSA

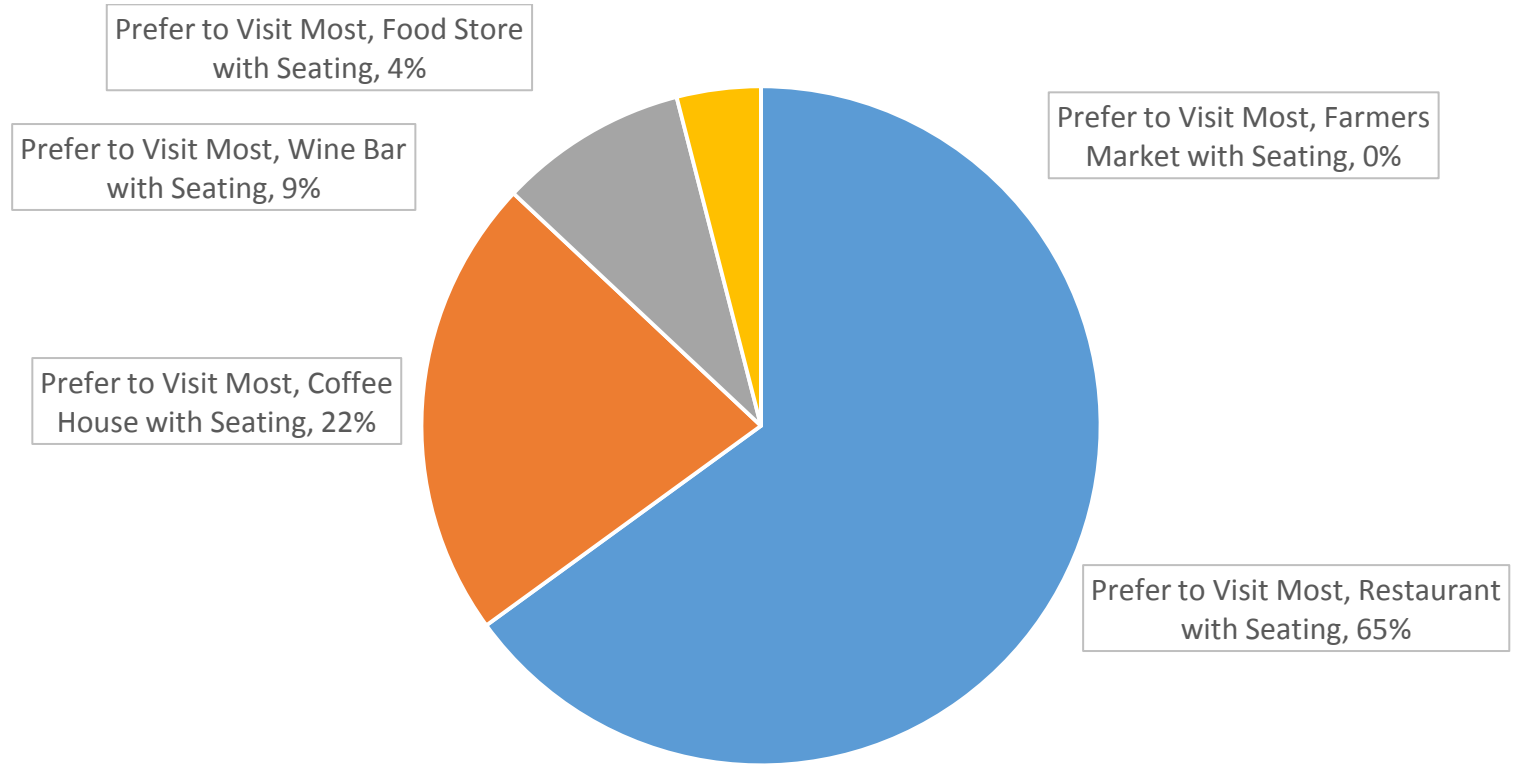
* The rating of convenience is based on a very small response to be reliable. This question was not asked in the Public survey.

Favorite Shopping Areas

We asked panelist to check up to 4 general shopping areas that the like to visit most. (not necessarily need to be where they buy their food or spend the most money)

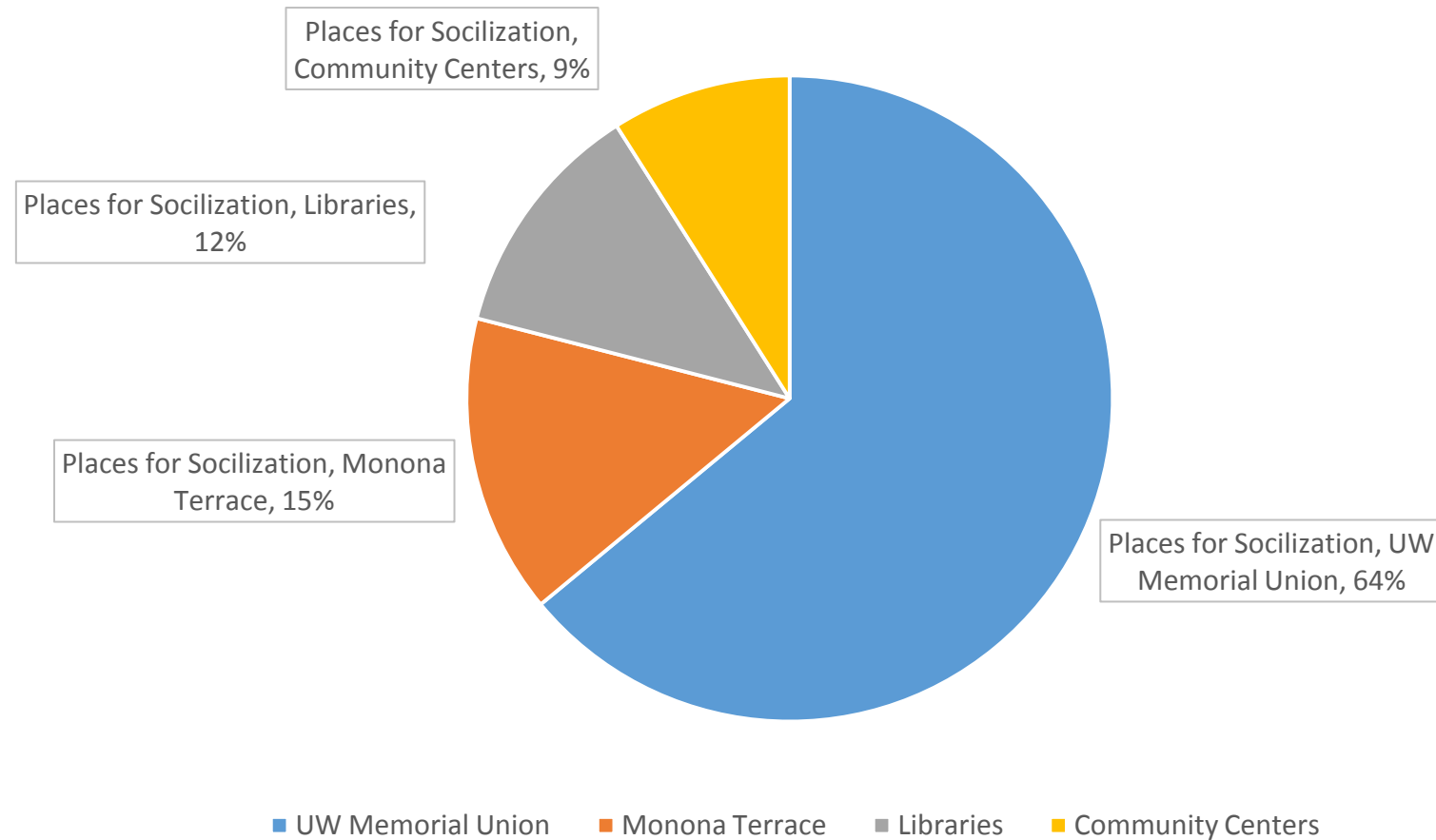
Shopping Areas	Panelist (total votes n= 1,071)
West Towne Mall Area	19%
Hilldale Mall Area	18%
Greenway Park Station	12%
East Towne Mall Area	11%
Downtown Madison	11%
Westgate Mall Area	8%
Monroe Street	7%
Williamson Street	5%
Atwood Avenue	4%
Downtown Middleton	4%
Park Street	1%

Places preference for socializing (among choices offered)



■ Restaurant with Seating ■ Coffee House with Seating ■ Wine Bar with Seating ■ Food Store with Seating ■ Farmers Market with Seating

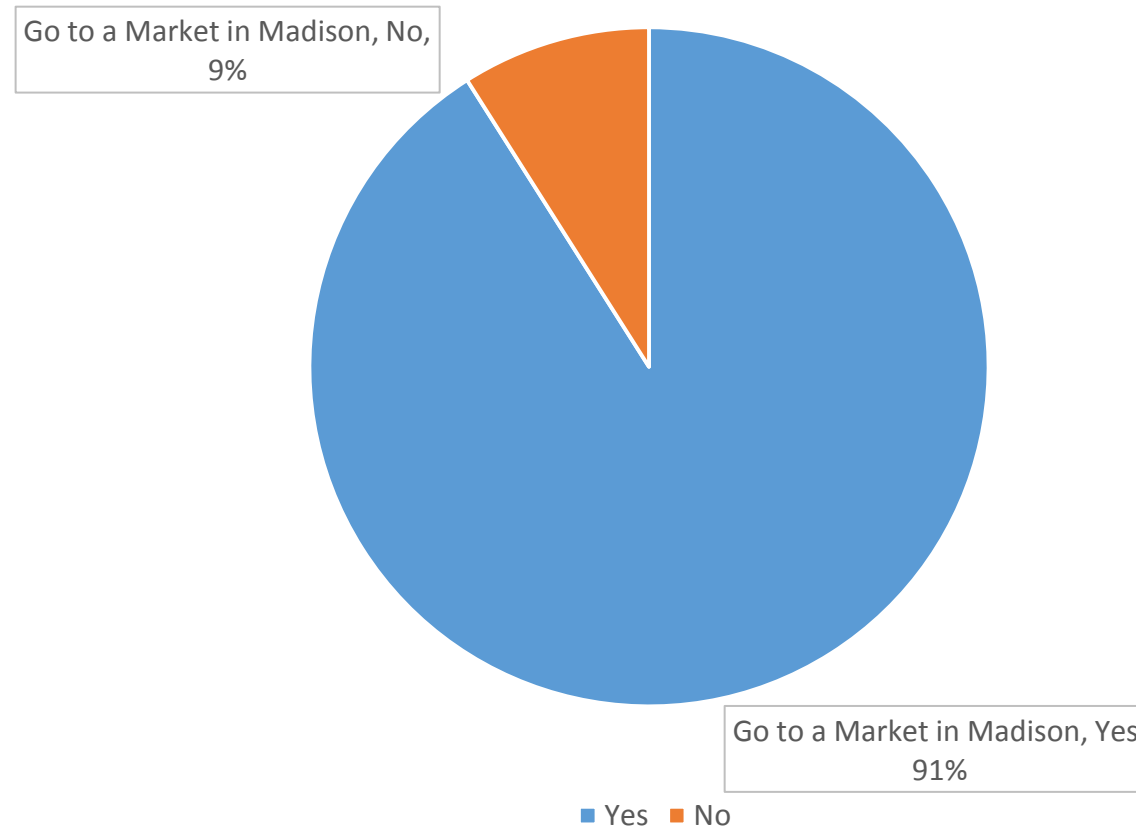
Preferences for Public Space Socialization (among places offered)



Public Markets that they have visited

Market	Panel	Public
Seattle Public Market	Na	35%
Milwaukee Public Market	13%	34%
Reading Terminal Market	Na	10%
Minneapolis Global Market	2%	9%
Chicago French Market	3%	6%
Detroit Eastern Market	Na	3%
Others	6%	27%
Been to a Market	21%	73%

Public survey – I would go to a Pubic Market in Madison



Potential amount of time willing to travel to a public market

	Panel	Public
Up to 5 minutes	100%	100%
Up to 10-minutes	97%	97%
Up to 15 minutes	75%	79%
More than 15 minutes	36%	30%
Would not visit Market	6%	3%

Panel and Public percentages are based on people who would go to Market assuming automobile travel.

Asking people how long they are willing to travel is very hard for people to judge since they do not yet have the experience of the market. It is also difficult to judge how people measure time, that is from door to door or after they get into their car. Computer calculations on travel time are from just the drive time and does not include congestion or traffic signals.

Illustration of a 10 minute and 15-minute Travel time from State Capitol

The panel and the public survey indicate that 97% of the customers may travel 10-minutes to a public market. The map below illustrates an approximation of the area a 10 and 15-minute drive time contour might cover and the three maps on the following page show 10 minute drive times from three other locations.

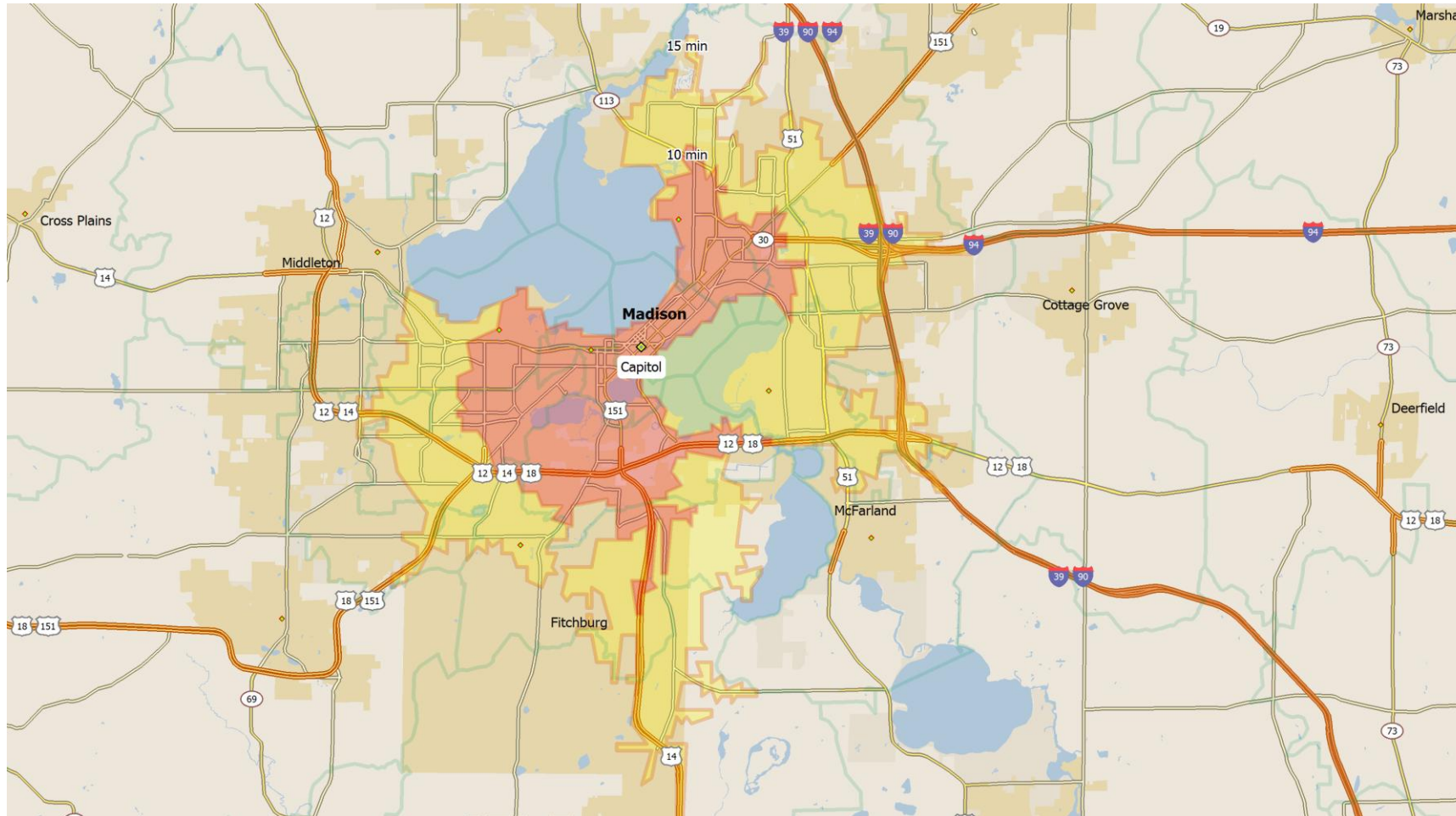
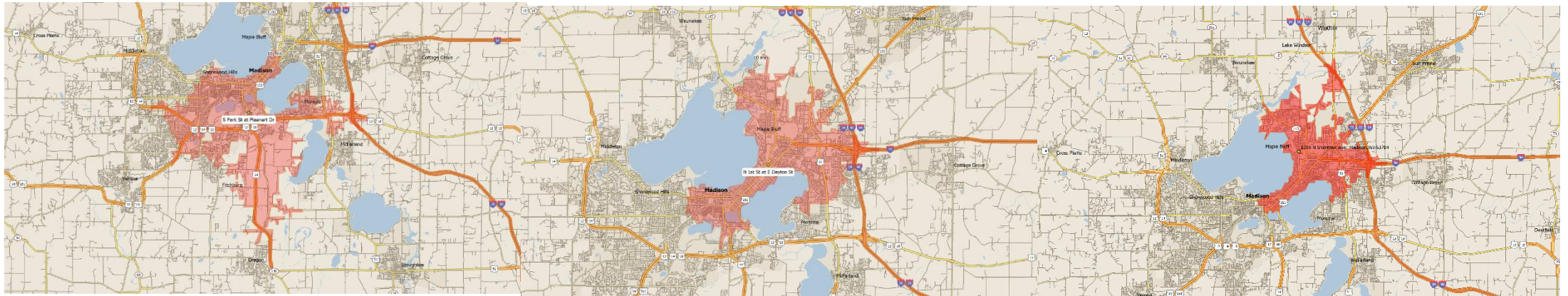


Illustration of a 10 and 15-minute Drive-time from Capitol

10-minute drive time comparisons and demographics from three hypothetical locations

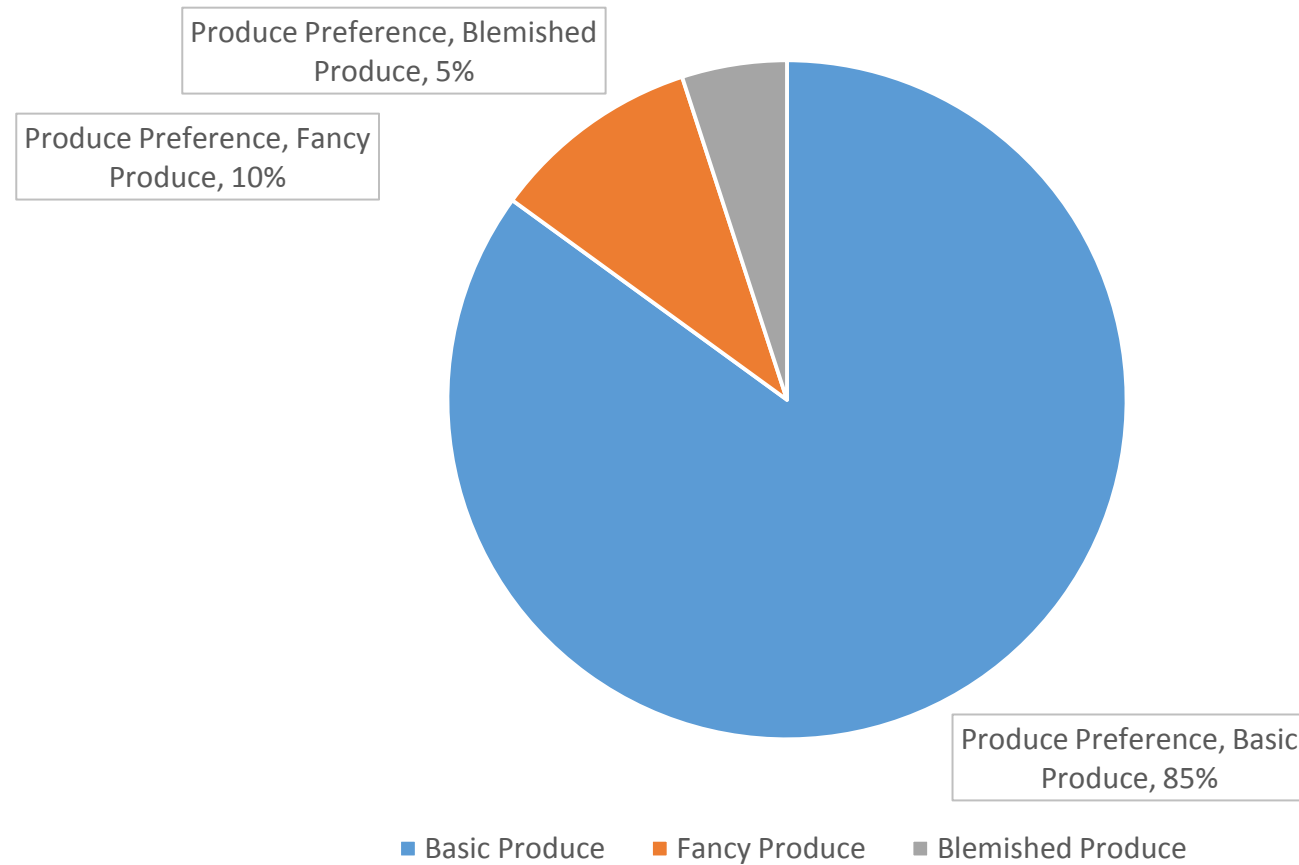


South Park St at Plaenert Dr:
118,611 population
51,412 households
\$188,186,000 food at home potential

N First St at Dayton:
173,232 population
48,974 households
\$110,868,000 food at home potential

1219 N Sherman Ave
89,543 Population
40,425 Households
\$138,690,000 food at home potential

Preference to different produce quality offerings



Preference for adjacent uses at a Public Market

	Panel	Public
Space for Cultural Events and Performances	42%	47%
Beer Garden	40%	43%
Kitchen for Cooking Classes and Events	37%	54%
Indoor/Outdoor Community Gathering Place	37%	54%
Adjacent to a Park for Recreation	23%	24%
Studio and Gallery Spaces for Artists	20%	33%
Playground	11%	22%

How would you see yourself using a public market (panel respondents)

Absolutely **Activities** Area Artisans Atmosphere Awhile Bars Buy Check Close Coffee Convenient
Couple Crowded Day **Depend** Destination Dinner Doubtful Downtown Easy Eating Enjoy Event Expensive
Family Farmers Find Food Fresh **Friends** Gather Gifts Good Great Grocery Hang Home Idea
Interested Items Kind Limited Live Local Location Long Love Lunch Madison Make **Market**
Meet Milwaukee Month Occasionally Offered Organic Outing Parking People Pick Place Plan Possibly
Prices Produce Products Provided **Public** Quality Reasonable Regular Regularly Restaurant Run
Shop Similar **Social** Sounds Special Specialty Square Stop
Store Summer Things Times Travel Trip Type Unique Variety Vendors Venue Visit Visitors Weather Week
Weekend Work

We described a public market and asked them how they would see themselves using it (sample panel responses)

I would probably try it out, but wouldn't expect to use it for all my shopping. Probably wouldn't use it for social activities.

maybe, with other local friends.

I would probably not utilize a public market, especially in the winter. I am limited in mobility.

No

I would love Madison to have a permanent public market like Pikes Place in Seattle

Probably not

I might check out in winter but I don't socialize much outside of work. My activities involve the dog rescue I volunteer with.

no

absolutely

I'd use it for shopping but not socializing

It would depend on the location -- I prefer to shop at a place close to my home. I would definitely visit it occasionally, but not regularly, if it is not near my home.

yes

No

I would shop there, but probably not use it for social activities.

No

I would shop there.

yes

I work downtown, would probably run over at lunch time to pick up lunch/dinner items. Also probably check it out on some weekends.

not sure, most likely not or very seldom

depending what they had there I would probably go there for specialty items; I would possible use it for socializing

Maybe a little

Yes, I would shop there occasionally. I would meet my friends there if there were plenty of tables.

Would not travel into Madison often for it

no

Only out of curiosity. No on the social activities.

possibly would check it out.

If it were in a central area with public transport, I could see myself going there. I would see myself using it as a social venue if, like the Dane County Farmers Market, it also had spaces for buskers and information tables (NARAL, PPAWI, candidates, etc.) to add to the life of the space. I'd probably shop there the way I do at the farmers markets: to interact with the producers and pick up things I can't get at the grocery store in the same way.

Depending on its location, the products' prices, and the entertainment offerings, I would use it as an occasional destination. Another consideration is how this type of market would deal with the varying weather conditions versus the competing usual providers of food, entertainment and venues for socialization.

I think would this type of market if there were free parking available. I live outside Madison (15 miles) and always have to find a place to park and sometime if around the square have to walk a ways and pay for parking. I am disabled which makes it hard for me to enjoy a lot of these things.

none

Would probably shop there at times, depending on what was available. In terms of social activities, it would depend on the activities. Probably would take guests when they visit.

Absolutely, much the way I do at the summer farmers market on the capitol square

Only Occasionally every couple of months

It would totally depend on the nature of the market and the facilities available there.

We would probably shop there with some frequency, but would probably not use it for social activities.

sounds good for shopping, not socializing though

Yes, if selection was good and prices reasonable.

Not sure

probably not

visit once or twice a year

I would visit a Public Market, shop there, meet friends there, as long as there is relatively convenient parking.

no

I would definitely shop at a Madison Public Market. When I'm in the Milwaukee area, I like going to their public market and wish Madison would start one of their own. Again, I like to support local artisans/vendors.

Yes, would stop there to socialize and shop.

I think a public market would be a great venue for social activities!

I would probably use the public market as a respite from the crowded 'supermarkets.' I enjoy looking at the variety of different food types offered at the Milwaukee Public Market. I enjoy talking to the vendors. Talking to the vendors would be my social activity.

I would shop if the prices were reasonable. I would not use it for social activities unless they would have some kind of "dating service" (similar to "It's only lunch).

Absolutely

I'm sure I'd use the Public Market for a variety of prepared foods.

probably not

Featuring local producers but also some exotic goods being available seasonally

possibly

Maybe occasionally

For shopping to get good quality locally grown or made. No interest in social aspect of markets.

A public market would be interesting, but I don't think I would use it for the majority of my shopping or for social activities

Possibility of meeting girlfriends there to shop and socialize while eating something tasty

no

No use for it.

I think so - as long as parking was fairly easy & reasonable

Word Cloud: What would make the Madison Public Market extraordinary? (panel survey)



What would make this market an extraordinary experience (sample panel responses)

Would need a coffee shop or food court with WI-FI

The quality and selection of vendors selling at the market.

Convenient parking and/or right on a bus line.

Wine bar, flower shop

don't know

specialty foods

I don't have any ideas at this time.

on-site restaurant/cafes

open six or seven days, if six, closed Mondays only

A local focus

?

high quality stuff year round

Lessons on cooking techniques, and how to pick good fruit and vegetables.

Not sure

don't know

Quality and a variety of food choices.

a location with free and plentiful parking.

I would enjoy the ability to sit and have a good cup of freshly roasted coffee. There should be local vendors preparing their food offerings in a variety of ways that show off the diversity of their products.

Tasting events.

Convenient parking

A place where you can purchase things that are not available in the supermarkets...

food carts?

Located in central location. Ease of parking and/or unlicensed transportation

Reasonable prices

Family oriented with something for everyone

n/a

Cooking demo's for game.

seasonal activities

Free parking

Space for seasonal products/demos.

entertainment venue

Tie in with established ethnic restaurants in Madison.

Regular theme meals that showcase local produce and chefs.

DO NOT KNOW

I cannot think of anything.

Great variety of local food and some things that you can't find traditionally in grocery stores like ethnic items and how to cook them.

cheetahs

Outdoor and Indoor Community Gardening Space

ability to sample small amounts

vendors of prepared foods

small samples of foods

Easy access and attention to people with mobility problems.

World class chefs and excellent diverse cuisine choices

Not sure but I might try with a friend.

I think a stage where local bands could perform would be great.

diverse food selections

ease of access and parking

Easy to get to, no cost to get there

Variety and price

good variety

Live music (like Dane Dances), especially right after work (to keep us downtown...hard to come back once home)

live music

Beautiful ornamental food/herb gardens surrounding the building.

none

I don't know

plenty of places to sit and eat some of the market foods

I think it should be located in a neighbor hood that people are already likely to go, so that people can cross between the market and other destinations. I generally try to combine my errands and my outings, and dislike having to go to the ends of the city for just one thing. (And as someone without a car, I dislike having to go to the edges of the city, period. It needs to be near public transit and bike routes.)

A large variety of food-related items to purchase, eat on the spot, and/or carry-out including an emphasis on international offerings with opportunities to meet the vendors, all at affordable prices. Add to that some free entertainment to draw customers. Think Portland(Oregon) Saturday Market on a smaller scale--and even they cut down on their open hours during their "winter" (LOL) months.

Near specialty, Madison-specific restaurants.

I don't know.

Free and good parking

lots of variety of specialty products

don't know as I would NOT visit!

I am not in favor of a Public Market in Madison with any public money. the only way it should happen is total funding from the private sector

foods from different countries

A variety of entertainment, local musicians and artists.

Reasonably priced coffee shop

not sure

Location would be important.. It should be someplace easy to reach via public transportation. It should have plenty of parking available nearby.

lots of vendors

Nothing

Focus Group Observations

As part of the market research, we conducted two consumer focus group sessions. We conducted these sessions on Wednesday, January 22, 2014 at the Madison Sheraton Hotel in a conference room. Each session was video recorded and simultaneously broadcast to an adjacent conference room where a group of City Staff members as well as the Chair and Vice Chair of the Local Food Committee were able to watch the sessions live and had the opportunity toward the end of each session to ask the moderator what areas they would like further information.

The focus group participants were professionally recruited by Matousek & Associates from Green Bay, WI. and each participant was paid \$50 for 90-minutes of their time and their opinions. The participants were not given the identity of the client when they were recruited and they were told it was for a study on food shopping habits. At the beginning of each session they were told they were being video recorded and that the client was a governmental agency and as a result there was a potential that their comments would be accessible in the public realm. At the end of each session they were told that the City of Madison was the client.

Session one began at 5:30 pm and the 11 person group was selected to have a representation of age, income, and race/ethnicity. The second group began at 7:30 pm and also had 11 participants. This group was selected by geographic criteria.

While each group had some slightly different attitudes, what came across in both groups is that people shop for food at multiple stores at different times of day and hours of day to fulfill their shopping needs. Generally, they are satisfied with the food stores but wish service might be faster, prices cheaper, and they would like to see more ethnic and specialty foods.

In regards to the Public Market, the participants expressed an interest in trying it and could foresee buying things there. However, they did not indicate that it is something that they necessarily need or would use on a day-to-day basis. Rather, they seemed favorable to idea of a Public Market, but viewed it as something they would use more occasionally if it offered something special. That something “special” might be a specific product that they found they loved, but more importantly, it was something more intangible than products – it was experience.

Delivering a compelling shopping experience that is both convenient (i.e. have good parking) and priced right (i.e. inexpensive) would be an attraction for them. They would likely shop at the market in a similar fashion to how they shop at the Dane County Farmers Market where they go to enjoy the experience, like to eat there and discover some different foods and maybe buy some food to take home.