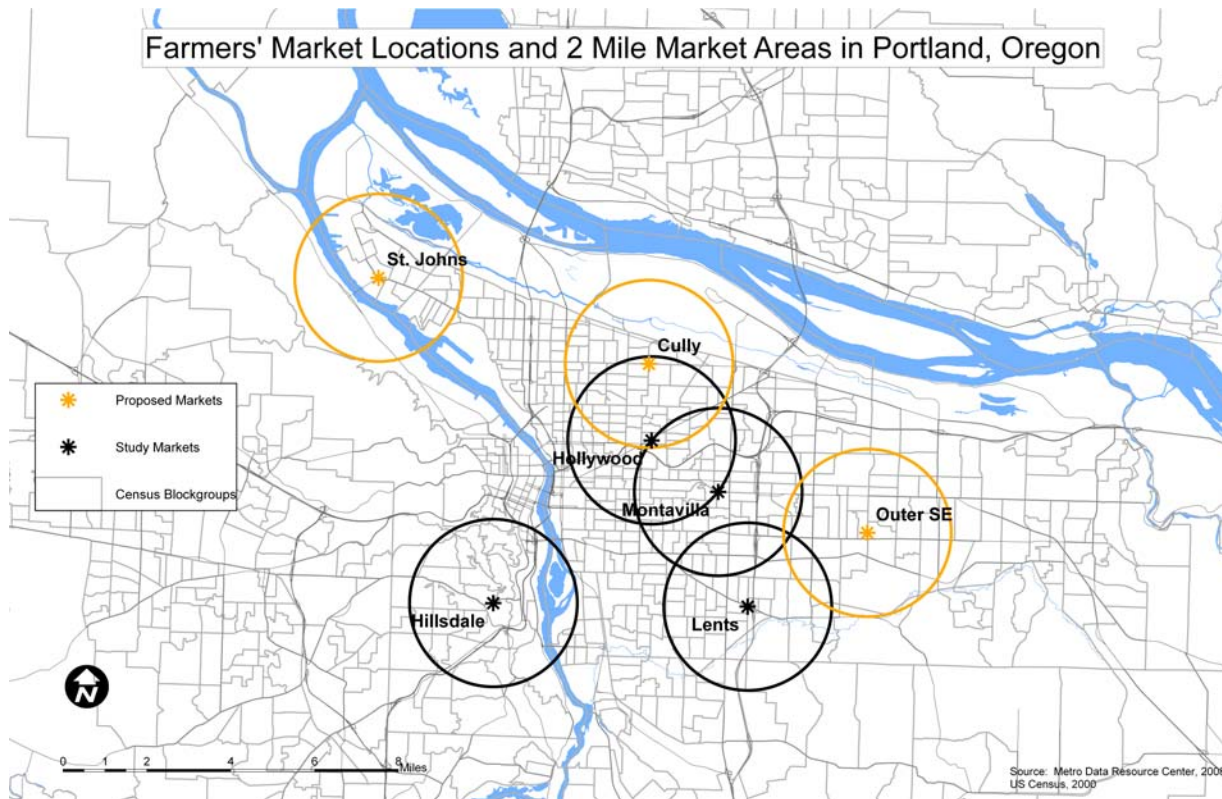


Geodemographic Profiling of Potential Farmers' Market Sites in Portland, Oregon



Geodemographic Profiles for Existing and Proposed Farmers' Markets

| Market* | Households | Aggregate Household Income | Average Household Income** | % Home Ownership | Per Customer Purchases | Total Sales 2007 | |
|----------|-----------------|----------------------------|----------------------------|------------------|------------------------|------------------|-------------|
| Existing | Hillsdale | 19,768 | \$1,483,876,600 | \$77,736 | 64% | \$30 | \$1,820,000 |
| | Hollywood | 43,259 | \$2,439,227,900 | \$59,963 | 61% | \$28 | \$1,800,000 |
| | Lents | 23,718 | \$1,028,712,200 | \$43,395 | 62% | \$10 | \$44,200 |
| | Montavilla | 33,170 | \$1,621,773,800 | \$49,444 | 60% | \$23 | \$207,000 |
| Proposed | Cully | 24,437 | \$1,407,272,100 | \$60,768 | 75% | -- | -- |
| | St. Johns | 9,634 | \$387,012,200 | \$42,321 | 61% | -- | -- |
| | Outer Southeast | 25,145 | \$1,093,128,300 | \$44,083 | 58% | -- | -- |

*Assumes no market area overlap. Households in blockgroups with centroids located in market areas for more than one market were treated as unique and used to calculate values for both market areas.

**Average household income calculated by taking the mean of the sum of aggregate household income for the block group divided by the total number of households for the block group. This value should be considered a general estimate of average household income for the market area.

Market Area Overlap for Existing and Proposed Farmers' Markets

| Market | Existing | | | | Proposed | | |
|----------|-----------------|-----------|-------|------------|----------|-----------|-----------------|
| | Hillsdale | Hollywood | Lents | Montavilla | Cully | St. Johns | Outer Southeast |
| Existing | Hillsdale | -- | 0% | 0% | 0% | 0% | 0% |
| | Hollywood | 0% | -- | 0% | 20% | 22% | 0% |
| | Lents | 0% | 0% | -- | 10% | 0% | 0% |
| | Montavilla | 0% | 20% | 10% | -- | 2% | 0% |
| Proposed | Cully | 0% | 22% | 0% | 2% | -- | 0% |
| | St. Johns | 0% | 0% | 0% | 0% | 0% | -- |
| | Outer Southeast | 0% | 0% | 4% | 0%* | 0% | 0% |

*Market area overlap exists, but no blockgroups have centroids located in the intersection area.

Marketing Scenario

Portland farmers markets sold an estimated \$11.2 million in 2007. The market for fruits and vegetables by Multnomah County households totals in aggregate over \$187 million. Given the vendor and product mix being sold in Portland farmers markets, these data suggest that Portland farmers markets currently capture about three percent of aggregate household spending on fruits and vegetables. As population growth is modest and areas served by farmers markets are relatively built-out, future growth in farmers markets is reliant on markets' ability to capture increased spending by appealing to consumers' interest in fresh, locally-grown produce and other unique products.

The City of Portland Office of Sustainable Development (OSD) and Portland Development Commission are conducting a study to examine the capacity for future expansion of Portland's farmers markets, looking at both local consumer demand and regional farmer/vendor supply. To capture more local food spending, farmers markets might increase their sales volume using a variety of approaches. One approach may be to attract new customers through the creation of new farmers' markets. Recent analysis suggests there may be three or more underserved (i.e., market deficient) areas in Portland. The potential locations for new farmers' markets include: St. Johns market, located at St. Johns Plaza on N Lombard Street, Cully, located at the Portland Community College Campus on NE Killingsworth, and an Outer Southeast market located St. Joseph's Catholic Church on SE 148th Avenue. The proposed locations are shown above with the existing markets used for demographic comparison purposes in this project.

Methods and Data

Four existing farmers' markets were selected as study markets for this project based on differences in geographic location and socioeconomic status of the residents in the market areas. These markets include Hillsdale, Hollywood, Montavilla, and Lents. Geodemographic profiles were developed for the study markets to evaluate the proposed market locations. The initial step in this process involved geocoding the market locations, then creating two mile buffers to delineate the market area. Addresses of existing markets were obtained from market websites, while proposed market locations were provided by OSD. Next, demographic and household income data from the 2000 Decennial Census was downloaded for blockgroups in Multnomah County. This data was joined to a blockgroup shapefile retrieved from Metro's Regional Land Information System (RLIS). Market area overlap was evaluated using the intersect tool. Using select by location, blockgroups with centroid contained in each market area were selected and summary statistics were recorded for the profile.

Results and Recommendations

The proposed market locations were evaluated based on geodemographic profile and market area overlap. Initial results indicate that the proposed market areas may be suitable for the location of new farmers' markets. However, additional analysis will be necessary prior to market establishment in these locations.

The proposed Cully market area appears to have a strong geodemographic profile, similar to the Hollywood market area. This may attributed to the fact that there is a 22% overlap of households in these two market areas. Assessing the nature of the market overlaps in these areas and more thoroughly exploring consumer demand is needed to more fully evaluate this potential location.

The proposed St. Johns location does not have a strong profile, with the lowest number of households, aggregate income, and average household income of all the market areas. Yet, it has no market overlap and is a geographically isolated area that may be underserved.

The Outer Southeast location has the strongest profile and very limited market area overlap. This location appears to be a solid candidate for a new farmers' market.

Limitations

Additional information about the neighborhoods where the proposed markets will be located is necessary for a more thorough market analysis. Info related to food access, site availability and suitability, and recent neighborhood demographic changes are not incorporated into this analysis. Also, further analysis of market area overlaps is necessary to more fully understand how they influence market revenues and consumer demand. Geodemographic profiling may provide a relatively quick way to explore the general socioeconomic conditions of a market area, but is probably not holistic enough by itself to base new market location decisions.