

Eau Claire Public Market Feasibility Study



Steering Committee Meeting 2
May 2016

Market Ventures Inc.

Agenda

1. Key informant interviews
2. Community Internet survey
3. Trade area analysis
4. Supply analysis
5. Public markets in comparably sized communities
6. Public market goals recap
7. Next steps

Key Informant Interviews

Name & Title	Organization	Category
Lisa Aspenson, Owner	Mona Lisa's restaurants	Business
*Deidra Barrickman, Manager	Eau Claire Farmers' Market	Nonprofit
Nancey Coffey, Nutrition Coordinator	UW Extension	Education
*Trish Cummings, Owner	Forage	Business
*Peter Farrow, President	Group Health	Business
*Carlos Garcia-Ruiz, Professor	UWEC	Education
*Miriam Gehler, Administrator	Marshfield Clinic	Business
Will Glass, Owner	Brewing Projekt	Business
Rachel Hart-Brinson, President	Just Local Food	Business
*Linda John, Executive Director	Visit Eau Claire	Nonprofit
Paul Kaldjian, Professor	UWEC	Education
*Tom Kemp, Member	Eau Claire Redevelopment Authority	Government
Caleb Langworthy, Owner	Blue Ox Organics	Farmer
*Eric Larsen, City Councilor	City of Eau Claire	Government
Erin LeFalve, Horticulture Educator	UW Extension	Education
*Guy Logan, Chef	Houligans	Business
Nick Meyer, Owner	Volume One	Business
Emily Moore, Executive Director	Feed My People Food Bank	Nonprofit
*Ned Noel, Associate Planner	City of Eau Claire	Government
Nik Novak, Storekeeper	Just Local Food	Business
*Tom Quinn, Executive Director	Wisconsin Farm Union	Nonprofit
*Blythe Rinaldi, VP Operations	Mayo Clinic Health System	Business
*Scott Rogers, Government Affairs & Workforce Director	Eau Claire Chamber of Commerce	Nonprofit
*Mike Schatz, Economic Development Director	City of Eau Claire	Government
*Pa Thao, Director	Hmong Association	Nonprofit
*Darryl Tufte, Director	Eau Claire Dept Of Community Development	Government
Adam Wehling, Dean	DVTC Horticulture Program	Education
*Andrew Werthmann, City Councilor	City of Eau Claire	Government

* Steering Committee

Key Informant Interviews – Comments

- Consumers very frugal. Some growers go to Twin Cities because buyers less price sensitive
- Area saturated with grocery stores; recent arrival of Woodman's has altered the local grocery sector
- Slowly evolving food scene with more independent restaurants but still limited
- Breweries are successful and growing
- Success of Downtown Farmers' Market, additional vendors looking to participate; concern about how public market might effect the farmers' market. Smaller but successful indoor winter market.
- Forage has identified and filled some demand for small-scale food production space
- Downtown rents are low
- University is downsizing while hospitals are strong
- Confluence project moving forward but generated some controversy about public funding, will absorb substantial portion of local philanthropic capacity
- Interest in integrating Hmong vendors into market; concern if next generation of Hmong will participate in farmers' markets
- Just Local Food Coop is evolving, will need additional space, would like to remain downtown

Community Internet Survey

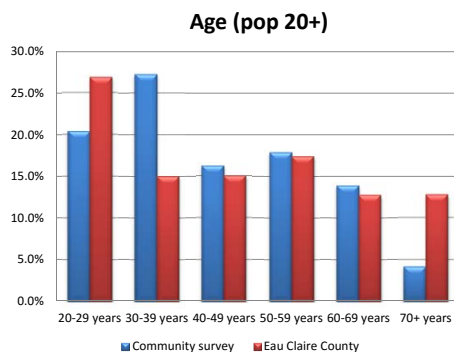
- Survey instrument utilized a question set that MVI has refined for other similar projects, altered to fit needs of this project
- Survey available on-line from March 24 – April 17, 2016
- Promoted by local project team via press releases, email blasts, social media, and (limited) paid advertising
- 3,602 surveys completed
- Self-selected respondents so not a random sampling of the population, but large dataset suggests that responses reflect a large proportion of area residents
- Sufficient statistical power to explore how different groups perceive and experience food shopping in Eau Claire and the proposed public market



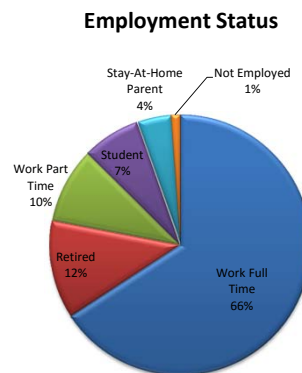
Community Internet Survey: Demographics

- 71% women; 29% men – women more likely to shop at a public market and typically spend more than men
- Largest group of respondents age 30-39
- Most respondents work full-time
- Average household size 2.74, above national average of 2.55
- Respondents represent 9,003 people

Q21. In what range does your age fall? (N=3,340)



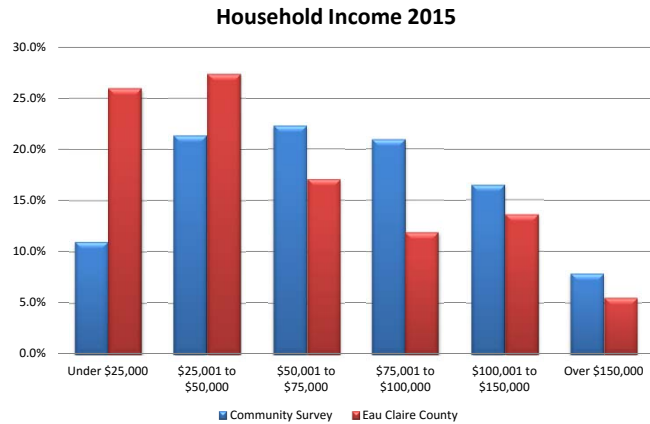
Q24. Which of the following best describes your current employment status? (N=3,283)



Community Internet Survey: Demographics

- Respondents wealthier than general population, typical of many public market customers

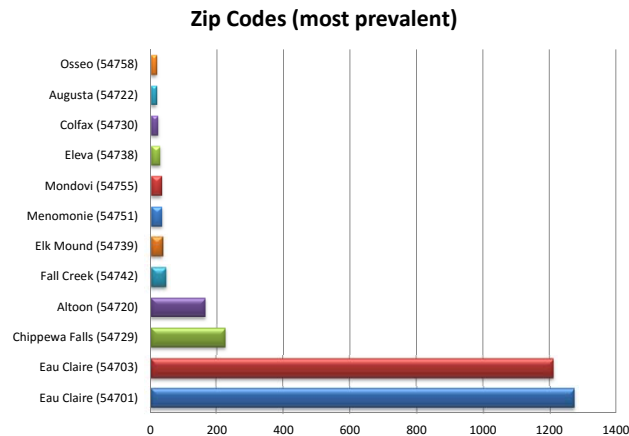
Q23. In what range did your 2015 total household income (before taxes) fall? (N=3,187)



Community Internet Survey: Demographics

- Respondents live in 109 zip codes
- Eau Claire zip codes represent 76% of respondents

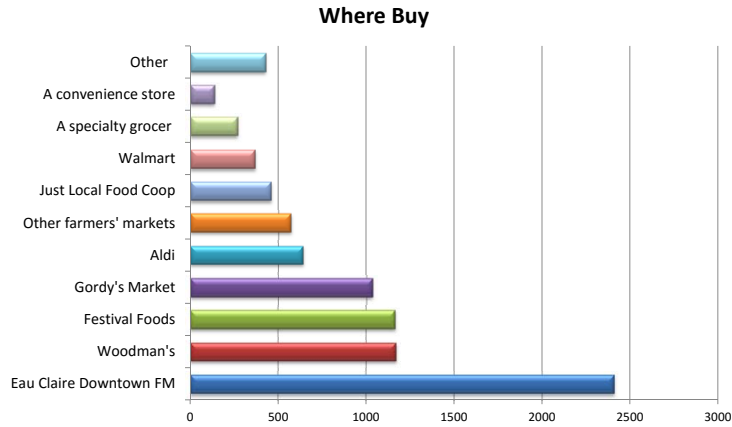
Q21. What is your home zip code? (N=3,283)



Community Internet Survey: Competition

- Majority (71%) indicated more than one store
- 67% indicated EC Downtown Farmers' Market; 32% each selected Woodman's and Festival Foods

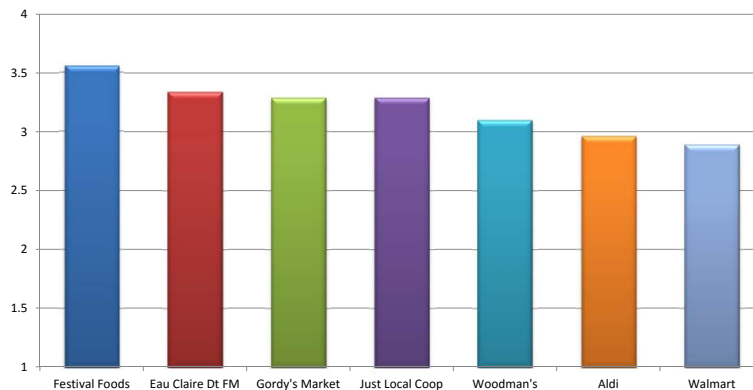
Q2. During the summer months, where does your household purchase most of its fresh foods?



Community Internet Survey: Competition

- Where does our household purchase most of its fresh foods by mean household income (five categories)

Where Buy by Mean Household Income
Eau Claire Community Survey

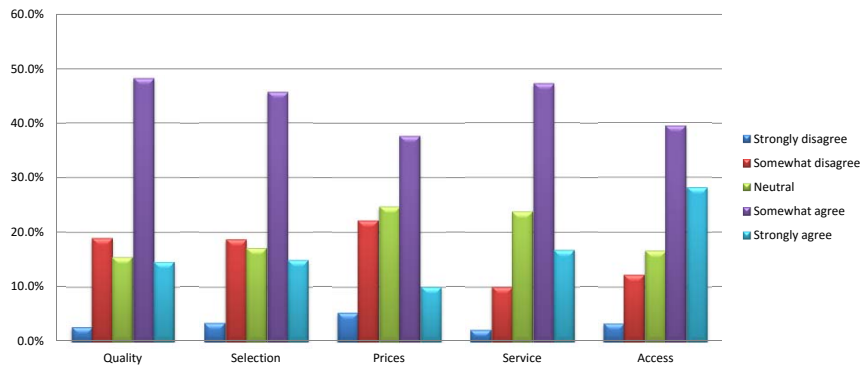


Community Internet Survey: Competition

Q3. For each of the following statements, please rate existing food stores around Eau Claire.

- The quality of fresh foods sold in Eau Claire meets my needs (N=3,583)
- The selection of fresh foods sold in Eau Claire meets my needs (N=3,560)
- The prices of fresh foods sold in Eau Claire meet my needs (N=3,568)
- Existing stores provide good service (N=3,572)
- It's easy to get to food stores around Eau Claire (N=3,572)

Existing Store Ranking

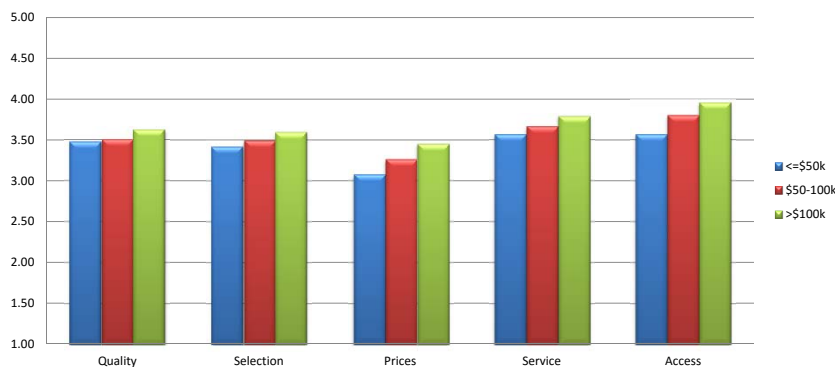


Community Internet Survey: Competition

Q3. For each of the following statements, please rate existing food stores around Eau Claire.

- The quality of fresh foods sold in Eau Claire meets my needs (N=3,583)
- The selection of fresh foods sold in Eau Claire meets my needs (N=3,560)
- The prices of fresh foods sold in Eau Claire meet my needs (N=3,568)
- Existing stores provide good service (N=3,572)
- It's easy to get to food stores around Eau Claire (N=3,572)

Existing Store Ranking by HH Income

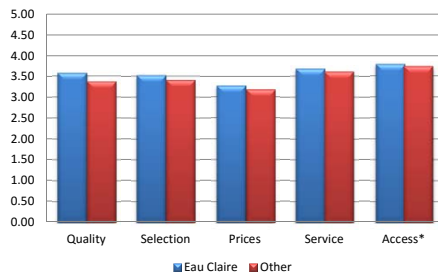


Community Internet Survey: Competition

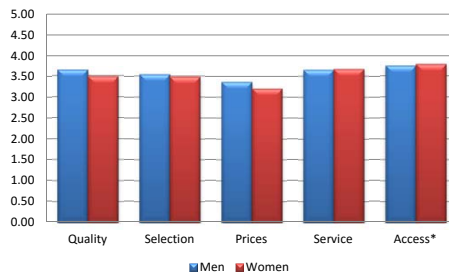
Q3. For each of the following statements, please rate existing food stores around Eau Claire.

- The quality of fresh foods sold in Eau Claire meets my needs (N=3,583)
- The selection of fresh foods sold in Eau Claire meets my needs (N=3,560)
- The prices of fresh foods sold in Eau Claire meet my needs (N=3,568)
- Existing stores provide good service (N=3,572)
- It's easy to get to food stores around Eau Claire (N=3,572)

Existing Store Ranking by Residence
Eau Claire Community Survey



Existing Store Ranking by Sex
Eau Claire Community Survey

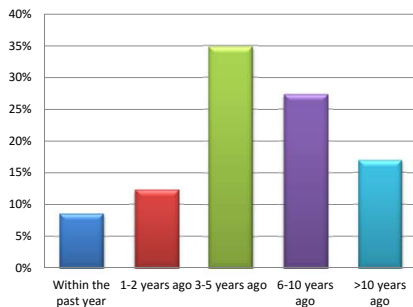


Community Internet Survey: Farmers' Market

- Nearly all respondents (93%) had visited a farmers' market in the past 12 months
- Nearly all respondents (94%) had ever visited the Eau Claire Downtown Farmers' Market; 94% of these visited within past year
- Most started coming 3-5 years ago and shop with moderate frequency

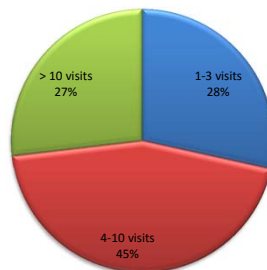
Q6. When was the first time you visited the Eau Claire Downtown Farmers' Market? (N=3,277)

First Visit to Dtnw Farmers' Mkt
Eau Claire Community Survey



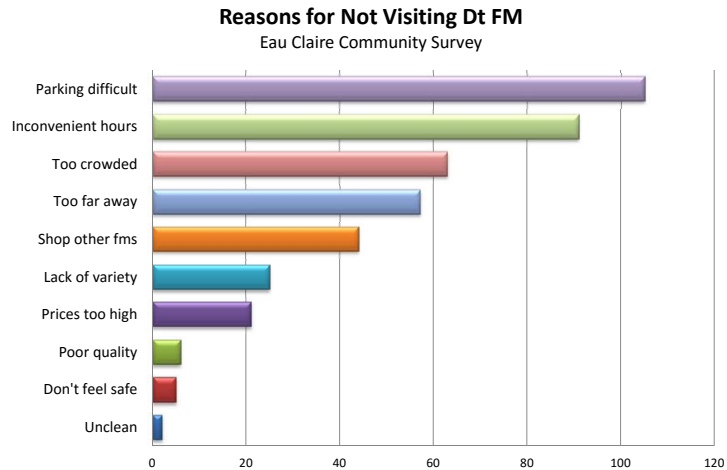
Q8. In the past year, about how many times have you visited Eau Claire Downtown Farmers' Market? (N=3,094)

Times Visited in Past Year
Eau Claire Community Survey



Community Internet Survey: Farmers' Market

Q10. What are the main reasons you have not visited the Eau Claire Downtown Farmers' Market recently? Check all that apply or add other reasons, below.



Community Internet Survey: Farmers' Market

Q12. For each of the following statements, please rate your most recent experiences at the Eau Claire Downtown Farmers' Market.

- The quality of products at the Eau Claire Downtown Farmers' Market is much better than places that sell similar products (N=3,003)
- The selection of products at the Eau Claire Downtown Farmers' Market is much better than places that sell similar products (N=3,009)
- The prices of products at the Eau Claire Downtown Farmers' Market are much better than places that sell similar products (N=3,011)
- The vendors are friendly and provide good service (N=3,014)

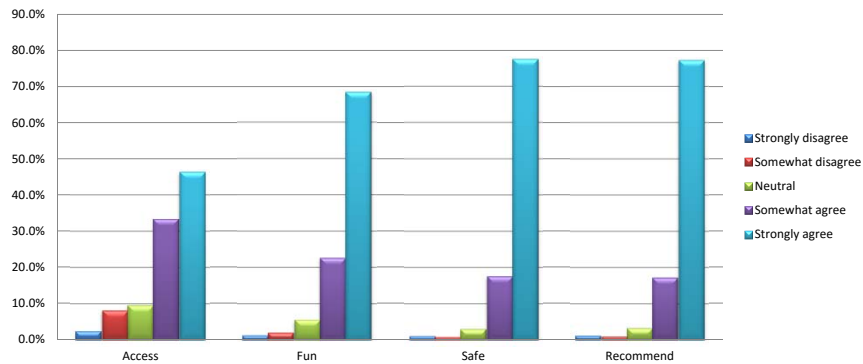


Community Internet Survey: Farmers' Market

Q12. For each of the following statements, please rate your most recent experiences at the Eau Claire Downtown Farmers' Market.

- It's easy to get to the Eau Claire Downtown Farmers' Market (N=3,011)
- It's fun to shop at the Eau Claire Downtown Farmers' Market (N=3,016)
- I feel secure and safe walking around the Eau Claire Downtown Farmers' Market (N=3,008)
- I would recommend the Eau Claire Downtown Farmers' Market to friends or relatives (N=3,009)

Experience at Downtown Farmers' Market



Community Internet Survey: Indoor Market

"We are exploring the possibility of creating a year-round, indoor public market facility that would complement – and not replace – the outdoor farmers' market. The indoor market would provide stalls for independent, locally owned businesses (including farmers) to sell fresh and prepared foods. It might also include facilities for educational programs and events.

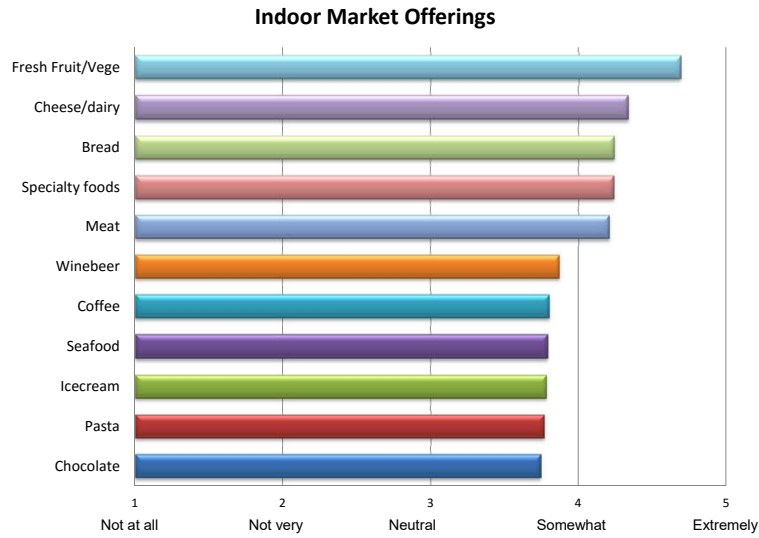
The indoor market would be designed to expand the types and availability of products that are sold to consumers at the farmers' market, including fresh foods such as meat, poultry, seafood, dairy, fruits and vegetables as well as baked goods and other prepared foods plus handmade crafts. While the focus would be on Wisconsin grown or made products, the indoor market would likely have products from outside the state, too. Vendor stalls could be designed so food could be made in the market.

Rents would be affordable so small, independent businesses could afford to operate there.



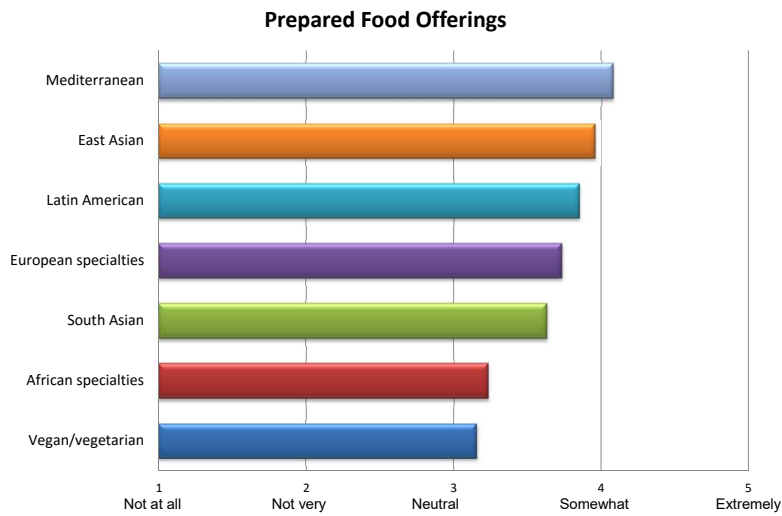
Community Internet Survey: Indoor Market

Q15. How interested are you in each of the following types of fresh and specialty foods being offered in a new indoor market facility in central Eau Claire:



Community Internet Survey: Indoor Market

Q16. How interested are you in each of the following types of prepared foods and other products being offered in a new indoor market facility in central Eau Claire:

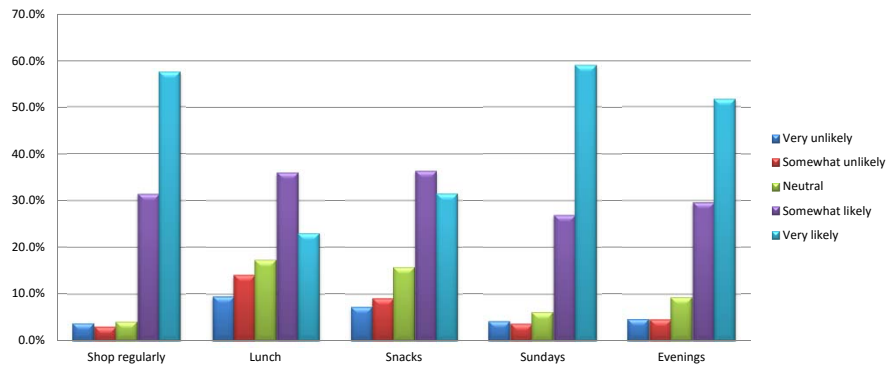


Community Internet Survey: Indoor Market

Q17. How likely are you to visit a new indoor public market in downtown Eau Claire...

- ... to shop for fresh foods on a regular basis? (N=3,362)
- ... for lunch on a regular basis? (N=3,355)
- ... for coffee, tea or snacks? (N=3,350)
- ... if it were open on Sundays? (N=3,357)
- ... if it were open on weekday evenings? (N=3,356)

Likeliness to Visit New Public Market

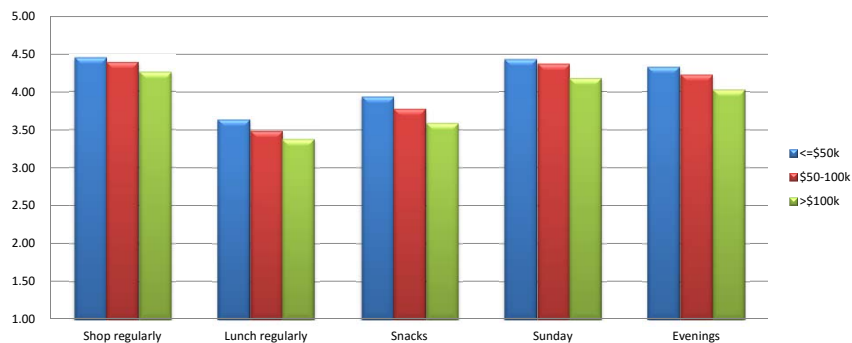


Community Internet Survey: Indoor Market

Q17. How likely are you to visit a new indoor public market in downtown Eau Claire...

- ... to shop for fresh foods on a regular basis?
- ... for lunch on a regular basis?
- ... for coffee, tea or snacks?
- ... if it were open on Sundays?
- ... if it were open on weekday evenings?

Likeliness to Visit by HH Income

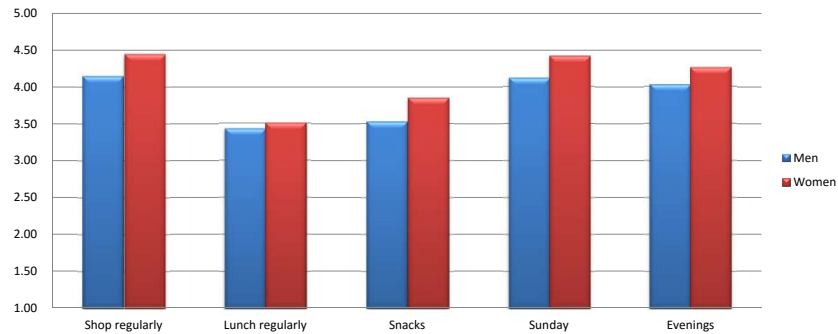


Community Internet Survey: Indoor Market

Q17. How likely are you to visit a new indoor public market in downtown Eau Claire...

- ... to shop for fresh foods on a regular basis?
- ... for lunch on a regular basis?
- ... for coffee, tea or snacks?
- ... if it were open on Sundays?
- ... if it were open on weekday evenings?

Likeliness to Visit by Sex

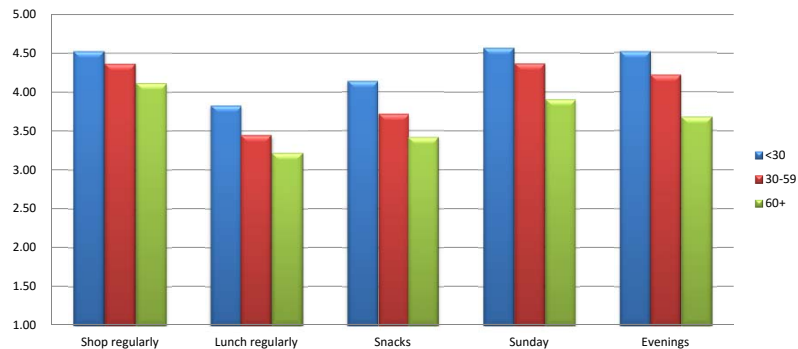


Community Internet Survey: Indoor Market

Q17. How likely are you to visit a new indoor public market in downtown Eau Claire...

- ... to shop for fresh foods on a regular basis?
- ... for lunch on a regular basis?
- ... for coffee, tea or snacks?
- ... if it were open on Sundays?
- ... if it were open on weekday evenings?

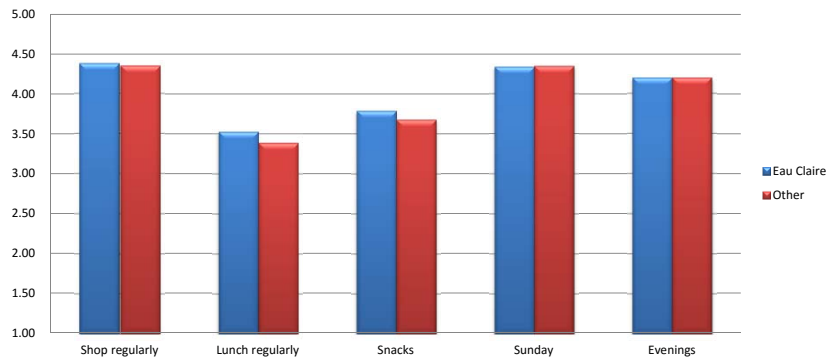
Likeliness to Visit by Age



Community Internet Survey: Indoor Market

- Q17. How likely are you to visit a new indoor public market in downtown Eau Claire...
- ... to shop for fresh foods on a regular basis?
 - ... for lunch on a regular basis?
 - ... for coffee, tea or snacks?
 - ... if it were open on Sundays?
 - ... if it were open on weekday evenings?

Likelihood to Visit by Residence

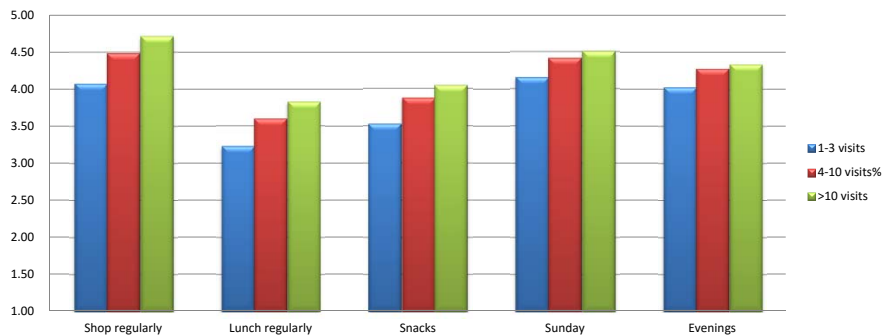


Community Internet Survey: Indoor Market

- Q17. How likely are you to visit a new indoor public market in downtown Eau Claire...
- ... to shop for fresh foods on a regular basis?
 - ... for lunch on a regular basis?
 - ... for coffee, tea or snacks?
 - ... if it were open on Sundays?
 - ... if it were open on weekday evenings?
- Q8. In the past year, about how many times have you visited the EC Downtown Farmers' Market?

Likelihood to Visit by Frequency of ECDFM Visits

Eau Claire Community Survey



Community Internet Survey: Indoor Market

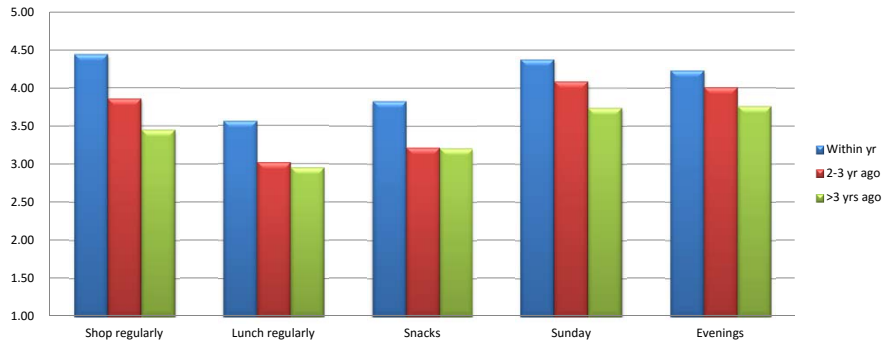
Q17. How likely are you to visit a new indoor public market in downtown Eau Claire...

- ... to shop for fresh foods on a regular basis?
- ... for lunch on a regular basis?
- ... for coffee, tea or snacks?
- ... if it were open on Sundays?
- ... if it were open on weekday evenings?

Q7. When was the most recent time you visited the Eau Claire Downtown Farmers' Market?

Likelihood to Visit by Most Recent Visit to ECDFM

Eau Claire Community Survey



Businesses mentioned in community survey

Q18. Are there any particular food or craft businesses from the Eau Claire region that you would like to see located in a downtown public market? What are their names:

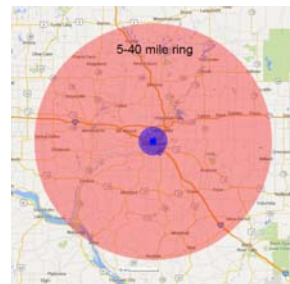
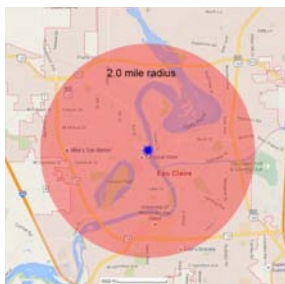
- Over 400 suggestions
- Rumps (94 mentions)
- Just Local Food Coop (68)
- Coffee Grounds (44)
- Brewing Projekt (40)
- Tangled up in Hue (38)
- Water Street Deli (35)
- Great Harvest (35)
- Nelson Cheese (35)
- Chip Magnet (29)
- Egg Roll Plus (25)
- Olson's Ice Cream (23)

Community Internet Survey: Comments

- 1,340 comments
- Most very positive and enthusiastic
 - “Yes we need this!” “Would love to have an indoor market!”
 - “I work nights, so I can never go to the farmer's market. I would love a place that was open later and/or more days a week.”
 - “This is one of THE best ideas I've heard of for the Eau Claire area. Make it happen!!
 - “We recently moved from Phoenix and the possibility of something like this excites me very much. As someone from outside the community, this is a huge draw 4 people relocating. One of my apprehensions of moving to a smaller town was the worry I would not find things such as this here. I am very excited and hopeful with this possibility! Thank you for allowing us to voice our input.”
- Some negative, concern about public funding, size of EC, parking, potential harm to farmers’ market
 - “This is a foolish waste of taxpayer money”; “This project is not economically feasible. It would require constant subsidies, especially in the winter months”
 - “Who’s paying for it? Where could you get local produce in winter? Parking parking parking!!”
 - “It's not needed. I get that Eau Claire likes to think of itself as the next Seattle or Austin when it comes to hipness and the "cutting edge" music and arts scene; the cultural Mecca of the Midwest! Unfortunately, Eau Claire is still basically a typical big town/small city.”

Trade Area Analysis

- Goal: to understand the characteristics of people living in and around Eau Claire in order to identify likely customers and estimate potential demand
- Trade areas
 1. The area where the market is easily accessible, including for people without cars, and a very convenient place to shop for fresh foods (2 mile radius)
 2. The band around the first area that is reasonably convenient but where there are other places to purchase similar products (band between 2 and 5 miles)
 3. The band around the second area that is not convenient but which can attract a small percentage of customers who appreciate the unique market environment and product offerings (band between 5 and 40 miles)



Demographics	2 m ring
Population 2010 census	34,492
Population 2016 estimate	34,834
Population 2021 projection	34,966
Population change 2010-2016 (%)	1.0%
Population change 2016-2021 (%)	0.4%
Population change 2016-2021	132
Racial diversity (% non-white)	10.0%
Percent Hispanic 2016	2.7%
Households 2016	13,919
Average household size	2.50
Median age	27.7
Average household income 2016	\$51,448
Median household income 2016	\$37,763
Household income >\$75,000/yr	2,980
Household income >\$75,000/yr (%)	21.4%
Household income <\$15,000/yr	2,534
Household income <\$15,000/yr (%)	18.2%
Family households	6,091
Family households	43.8%
Residents age 35-64	9,432
Targeted age range (35-64)	27.1%
Residents with bachelor's or higher	5,717
Bachelor's Degree	19.9%
Master's, Professional or Doctorate	10.3%
No Vehicles	8.8%

Trade Areas: 2 mile ring

- Small population that is not growing
- Very young median age
- Low average and median household income; large percentage of low income households
- 2,980 households with income above \$75,000
- Low percentage family households
- Below average percentage of residents in targeted age range (27.1%)
- High educational attainment: 5,717 adults with college or higher degrees
- Substantial percentage without vehicle (8.8%)

Demographics	2-5 m band
Population 2010 census	47,211
Population 2016 estimate	49,320
Population 2021 projection	50,803
Population change 2010-2016 (%)	4.5%
Population change 2016-2021 (%)	3.0%
Population change 2016-2021	1,483
Racial diversity (% non-white)	8.4%
Percent Hispanic 2016	2.6%
Households 2016	20,622
Average household size	2.39
Median age	38.0
Average household income 2016	\$73,061
Median household income 2016	\$58,618
Household income >\$75,000/yr	7,557
Household income >\$75,000/yr (%)	36.6%
Household income <\$15,000/yr	1,532
Household income <\$15,000/yr (%)	7.4%
Family households	13,475
Family households	65.3%
Residents age 35-64	18,667
Targeted age range (35-64)	37.8%
Residents with bachelor's or higher	10,654
Bachelor's Degree	20.8%
Master's, Professional or Doctorate	11.0%
No Vehicles	4.1%

Trade Areas: 2-5 m band

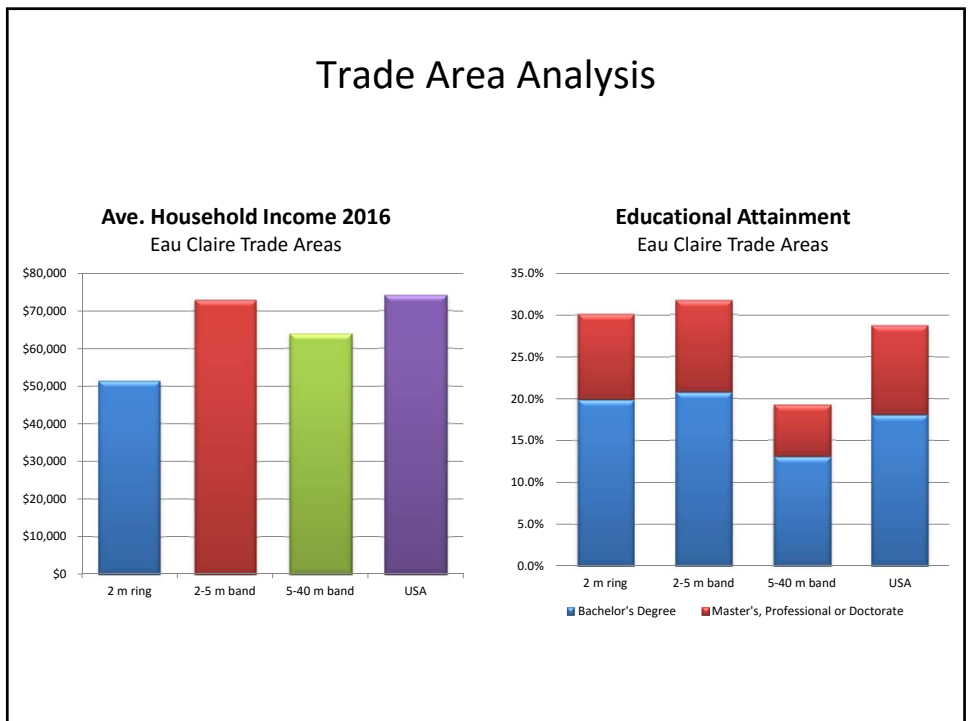
- Slightly larger population than first trade area but growing modestly
- Smallest household size but average percent of family households
- Highest average household income of three trade areas; slightly below national average (7,557 upper income households)
- Highest educational attainment, above national average. 10,654 adults with bachelor's degree or higher
- Few households without vehicles

Eau Claire Public Market Feasibility Study

Demographics	5-40 m band	Total	USA
Population 2010 census	193,487	275,190	
Population 2016 estimate	196,140	280,294	
Population 2021 projection	198,744	284,513	
Population change 2010-2016 (%)	1.4%	1.9%	3.5%
Population change 2016-2021 (%)	1.3%	1.5%	3.5%
Population change 2016-2021	2,604	4,219	
Racial diversity (% non-white)	5.1%		28.9%
Percent Hispanic 2016	2.7%		17.6%
Households 2016	77,391	111,932	
Average household size	2.53	2.50	2.55
Median age	40.3		37.9
Average household income 2016	\$64,065		\$74,165
Median household income 2016	\$52,019		
Household income >\$75,000/yr	23,624	34,161	
Household income >\$75,000/yr (%)	30.5%	30.5%	
Household income <\$15,000/yr	8,624		
Household income <\$15,000/yr (%)	11.1%		
Family households	52,352	71,918	
Family households	67.6%	64.3%	66.4%
Residents age 35-64	75,906	104,005	
Targeted age range (35-64)	38.7%	37.1%	39.5%
Residents with bachelor's or higher	25,408	41,779	
Bachelor's Degree	13.1%		18.1%
Master's, Professional or Doctorate	6.2%		10.7%
No Vehicles	5.0%		

Trade Areas: 5-40 mile band, total

- Large area with low population density
- Average household sizes and slightly high percentage of family households
- Lower average household income than second trade area, below national average
- 23,624 upper income households, 31% of population
- Highest percentage of residents in targeted age group
- Lowest rate of educational attainment; 25,408 adults with bachelor's or higher



Trade Area Analysis

Fresh and specialty food purchasing index

Index to USA Score	Eau Claire Study Area		
	2 m ring	2-5 m band	5-40 m band
Year 2016 Estimate			
Food at Home - overall	97	96	96
Food away from Home - overall	103	91	90
<i>Market categories</i>			
Bread	96	94	99
Dairy	101	98	102
Cheese	105	104	108
Meat	94	93	97
Poultry	76	69	74
Prepared foods	107	102	105
Produce - fresh	84	84	87
Seafood - fresh	61	59	67
Specialty food (jams, jellies)	108	112	115
Sweets (candy)	108	112	117
Beverages - nonalcoholic	105	97	100
Beer	135	98	105
Wine	68	76	74

Source: Nielsen 2016

Trade Area Analysis

Consumer Expenditures: Food & Beverage, Eau Claire					Consumer Expenditures: Food & Beverage, Eau Claire				
2 mile ring Market categories	2016	2021	Δ \$	Δ %	2-5 mile band Market categories	2016	2021	Δ \$	Δ %
	Estimate	Projection				Estimate	Projection		
	(000s)	(000s)	(000s)			(000s)	(000s)	(000s)	
Bread	\$2,419	\$2,459	\$40	1.7%	Bread	\$3,517	\$3,660	\$143	4.1%
Dairy	\$5,407	\$5,601	\$194	3.6%	Dairy	\$7,753	\$8,219	\$466	6.0%
Cheese	\$2,014	\$2,099	\$85	4.2%	Cheese	\$2,974	\$3,174	\$200	6.7%
Meat	\$7,301	\$7,516	\$215	2.9%	Meat	\$10,796	\$11,372	\$576	5.3%
Poultry	\$1,974	\$2,025	\$51	2.6%	Poultry	\$2,650	\$2,796	\$146	5.5%
Prepared foods	\$2,925	\$3,015	\$90	3.1%	Prepared foods	\$4,011	\$4,270	\$259	6.5%
Produce - fresh	\$6,520	\$6,772	\$252	3.9%	Produce - fresh	\$9,685	\$10,327	\$642	6.6%
Seafood - fresh	\$600	\$615	\$15	2.5%	Seafood - fresh	\$867	\$927	\$60	6.9%
Specialty food	\$5,163	\$5,353	\$190	3.7%	Specialty food	\$7,616	\$8,080	\$464	6.1%
Sweets (candy)	\$1,462	\$1,508	\$46	3.1%	Sweets (candy)	\$2,245	\$2,367	\$122	5.4%
Coffee/Tea	\$1,825	\$1,896	\$71	3.9%	Coffee/Tea	\$2,729	\$2,898	\$169	6.2%
Wine/Beer	\$3,586	\$3,701	\$115	3.2%	Wine/Beer	\$4,496	\$4,834	\$338	7.5%
Total	\$41,196	\$42,560	\$1,364	3.3%	Total	\$59,339	\$62,924	\$3,585	6.0%
All Food at Home	\$58,716	\$60,660	\$1,944	3.3%	All Food at Home	\$84,232	\$89,174	\$4,942	5.9%
All Food Away Home	\$34,109	\$35,050	\$941	2.8%	All Food Away Home	\$44,380	\$47,369	\$2,989	6.7%

Source: Nielsen 2016

Trade Area Analysis

Consumer Expenditures: Food & Beverage, Eau Claire				
5-40 mile band	2016 Estimate	2021	Δ \$	Δ %
Market categories	(000s)	Projection (000s)	(000s)	
Bread	\$13,872	\$14,212	\$340	2.5%
Dairy	\$30,042	\$31,303	\$1,261	4.2%
Cheese	\$11,542	\$12,066	\$524	4.5%
Meat	\$41,953	\$43,397	\$1,444	3.4%
Poultry	\$10,740	\$11,161	\$421	3.9%
Prepared foods	\$15,781	\$16,500	\$719	4.6%
Produce - fresh	\$37,507	\$39,499	\$1,992	5.3%
Seafood - fresh	\$3,689	\$3,962	\$273	7.4%
Specialty food	\$28,972	\$30,076	\$1,104	3.8%
Sweets (candy)	\$8,782	\$8,989	\$207	2.4%
Coffee/Tea	\$10,426	\$10,881	\$455	4.4%
Wine/Beer	\$17,347	\$18,163	\$816	4.7%
Total	\$230,653	\$240,209	\$9,556	4.1%
All Food at Home	\$326,938	\$340,186	\$13,248	4.1%
All Food Away Home	\$165,520	\$173,217	\$7,697	4.7%
Total Fresh/Specialty Food (3 Trade Areas)	\$331,188	\$345,693	\$14,505	4.4%
All Food at Home	\$469,886	\$490,020	\$20,134	4.3%
All Food Away Home	\$244,009	\$255,636	\$11,627	4.8%

Source: Nielsen 2016

Trade Area Analysis Capture Rate Analysis

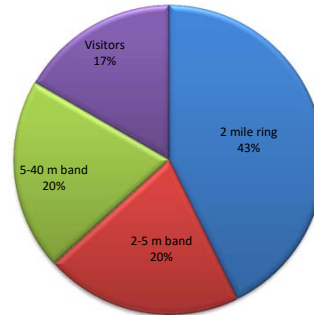
Market categories	2 mile ring			2-5 m band			5-40 m band			Total	
	Population	Demand (000s)	Potential (000s)	Demand (000s)	Potential (000s)	Demand (000s)	Potential (000s)	Demand (000s)	Potential (000s)	Demand (000s)	Demand Total (000s)
Bread	34,834	\$2,419	\$121	\$3,517	\$59	\$13,872	\$58	\$19,808	\$238		
Dairy		\$5,407	\$162	\$7,753	\$78	\$30,042	\$75	\$43,202	\$315		
Cheese		\$2,014	\$81	\$2,974	\$40	\$11,542	\$38	\$16,530	\$159		
Meat		\$7,301	\$292	\$10,796	\$144	\$41,953	\$140	\$60,050	\$576		
Poultry		\$1,974	\$79	\$2,650	\$35	\$10,740	\$36	\$15,364	\$150		
Prepared foods		\$2,925	\$117	\$4,011	\$53	\$15,781	\$53	\$22,717	\$223		
Produce - fresh		\$6,520	\$261	\$9,685	\$129	\$37,507	\$125	\$53,712	\$515		
Seafood - fresh		\$600	\$30	\$867	\$14	\$3,689	\$15	\$5,156	\$59		
Specialty food		\$5,163	\$207	\$7,616	\$102	\$28,972	\$97	\$41,751	\$406		
Sweets (candy)		\$1,462	\$58	\$2,245	\$30	\$8,782	\$29	\$12,489	\$117		
Coffee/Tea		\$1,825	\$73	\$2,729	\$36	\$10,426	\$35	\$14,980	\$144		
Wine/Beer		\$3,586	\$108	\$4,496	\$45	\$17,347	\$43	\$25,429	\$196		
Total/Average/Total		\$41,196	\$1,589	\$59,339	\$765	\$230,653	\$744	\$331,188	\$3,098		

Trade Area Analysis Capture Rate Analysis

Demand Summary

Resident demand	\$3,098,000
Visitor demand %	20%
Visitor demand \$	\$619,600
Total demand	\$3,717,600
Average sales per sf	\$700
Supportable sf (net)	5,300
Supportable sf (gross)	8,000

Sources of Demand Eau Claire Public Market

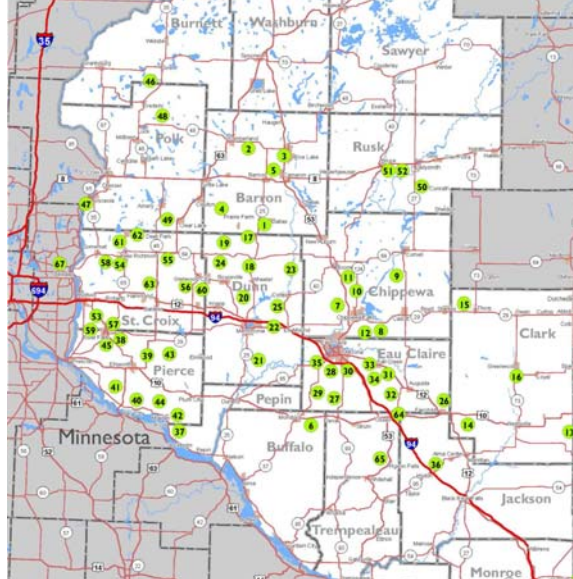


Supply Analysis

- Key informant interviews
- Vendor focus groups
- Regional farming analysis
- Competitive analysis

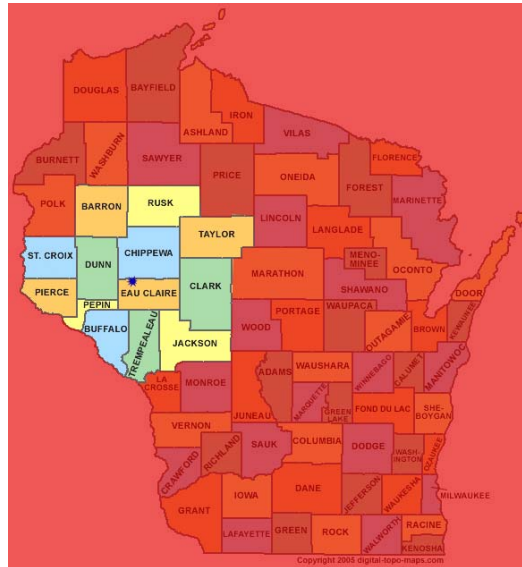
Supply Analysis

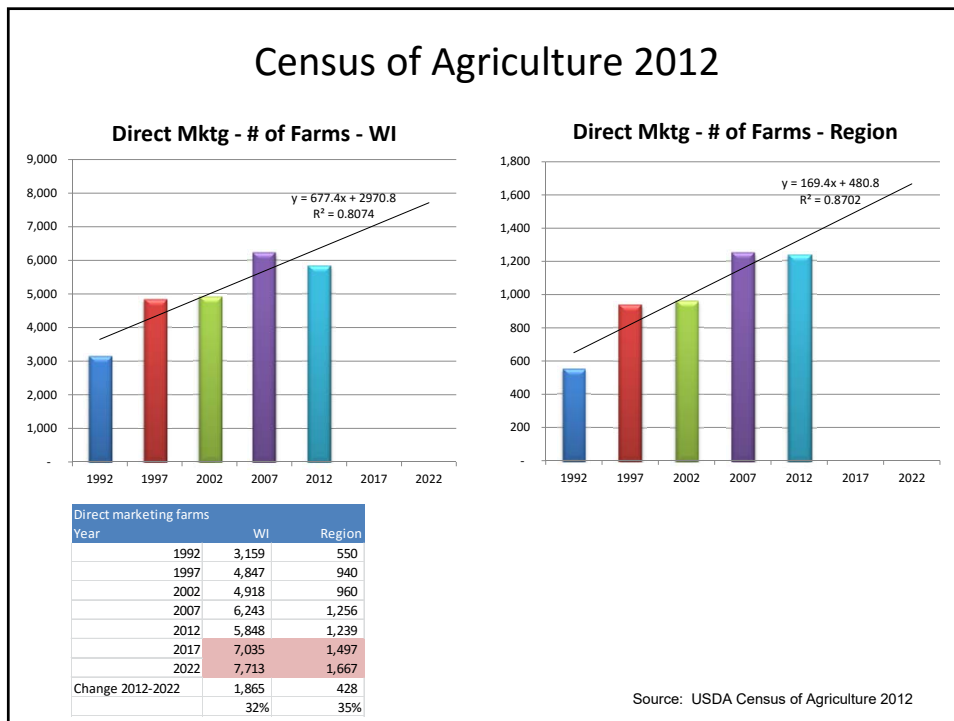
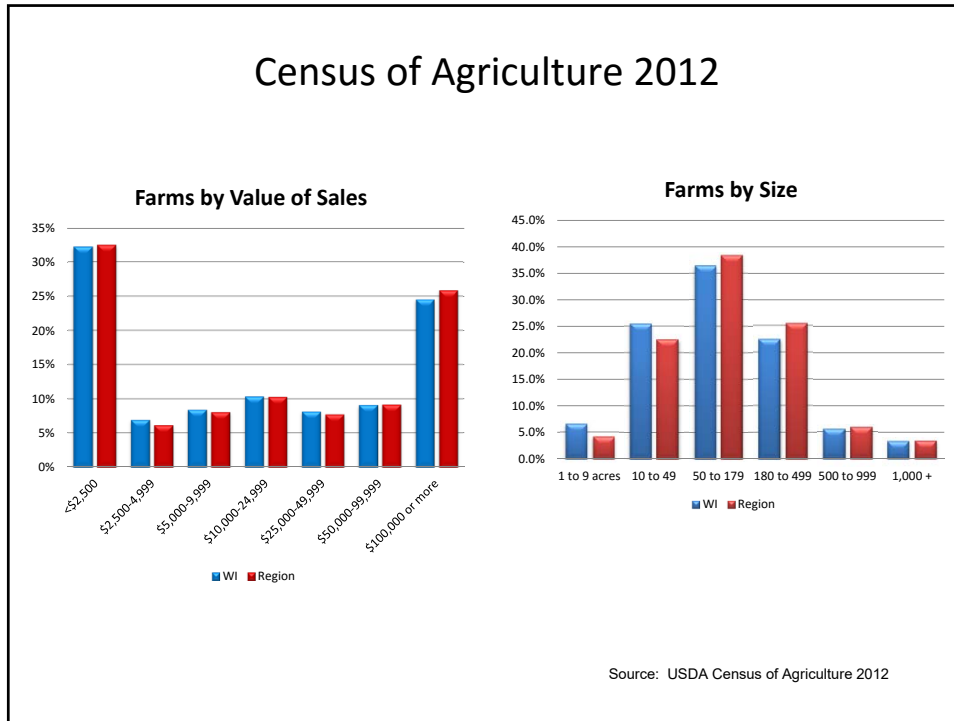
Farm Fresh Atlas 2015 –
Western Wisconsin
West Central Wisconsin Regional
Planning Commission



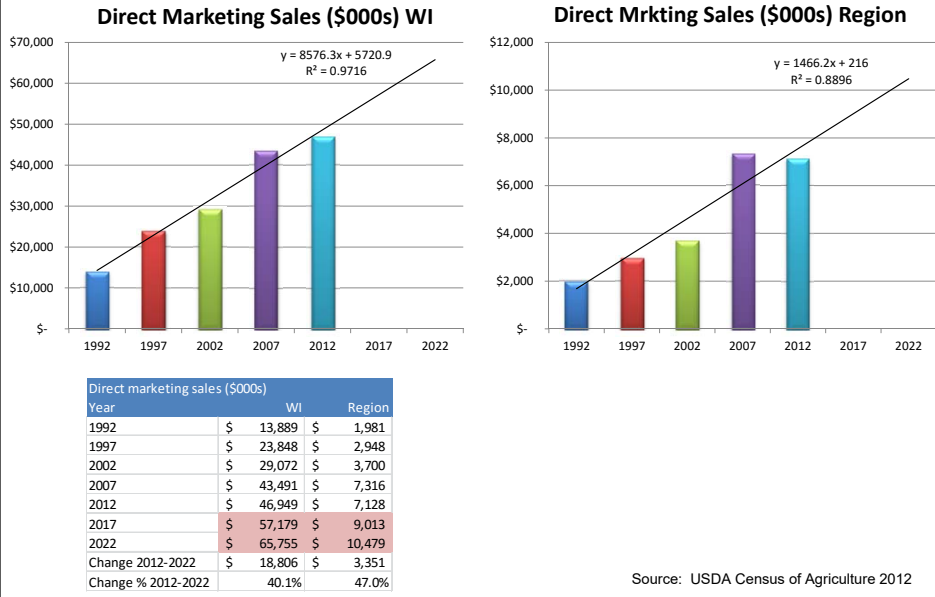
Supply Analysis

County	Sq. Miles	Population
Barron	890	45,676
Buffalo	710	13,357
Chippewa	1,041	63,132
Clark	1,219	34,615
Dunn	864	44,122
Eau Claire	645	101,438
Jackson	1,000	20,644
Pepin	249	7,360
Pierce	592	40,976
Rusk	931	14,395
St. Croix	736	85,930
Taylor	984	20,610
Trempealeau	742	29,582
Total	10,603	521,837
Radius if area a circle	58.1	
Acres in farms	3,564,827	
Sq. miles in farms	5,570	
% land in farms	53%	

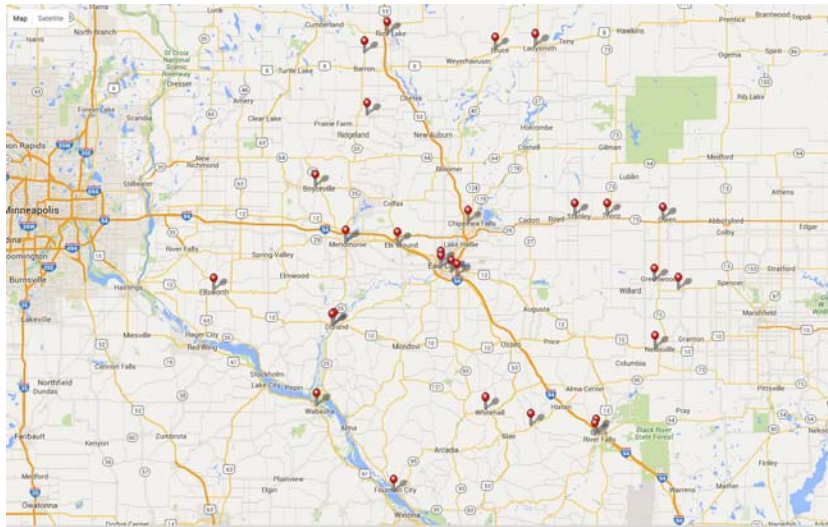




Census of Agriculture 2012



Farmers' Markets within 50 Miles



Source: USDA National Farmers' Market Directory

Public Markets in Comparably Size Cities

Metro Area	Pop 2013	Name	Market type	Era	Operation	Retail days
Napa, CA	140,326	Ox Bow Public Market	Hall	New	Year-round	7
Santa Fe, NM	147,423	Sante Fe Farmers' Market	Mixed	New	Year-round	2
Eau Claire, WI	164,570					
Bellingham, WA	206,353	Everyday Public Market	Hall (hybrid)	New	Year-round	7
Charlottesville, VA	224,055	Main Street Market	Hall	New	Year-round	6
Charleston, WV	224,743	Capitol Market	Mixed	Modern	Year-round	7
Lynchburg, VA	256,455	Lynchburg Community Market	Mixed	Historic	Year-round	5
Cedar Rapids, IA	262,421	NewBo City Market	Hall	New	Year-round	4
Ann Arbor, MI	354,240	Kerntown Market & Shops	Mixed	Modern	Year-round	7
Trenton, NJ	370,414	Trenton Farmers' Market	Shed (enclosable)	Historic	Year-round	3
Flint, MI	415,376	Flint Farmers' Market	Hall	New (relocation)	Year-round	3
Asheville, NC	437,657	Western NC Farmers' Market	Mixed	Modern	Year-round	7
York-Hanover, PA	438,965	Central Market	Hall	Historic	Year-round	3
Lansing, MI	467,321	Lansing City Market	Hall	New (relocation)	Year-round	6

Eau Claire Public Market Goals

1. Support the northwest Wisconsin food system
2. Provide entrepreneurial opportunities and jobs
3. Help revitalize downtown and adjacent neighborhoods
4. Contribute to community wellness
5. Become a community asset that attracts and retains talented people

Scope of Work

1. Project initiation
 - a) Goal setting
 - b) Partnership opportunities
 - c) Steering Committee meeting #1
2. Demand analysis
 - a) Key informant interviews
 - b) Resident Internet survey
 - c) Trade area analysis
3. Supply analysis
 - a) Vendor assessment
 - b) Vendor survey
 - c) Competitive analysis
4. Steering Committee meeting #2
5. Site analysis
6. Merchandising concept & development program
7. Design concept
8. Steering Committee meeting #3
9. Financial analysis
 - a) Vendor *pro forma*
 - b) Operations *pro forma*
 - c) Development estimate
 - d) Financing
10. Ownership and operational structure
11. Steering Committee meeting #4; report

Next Steps

- Vendor focus group analysis/finalize market research
- Site analysis
- Merchandising principles/strategies
- Design concept
- Steering Committee meeting #3

Eau Claire Public Market Feasibility Study



Steering Committee Meeting 2
May 2016

Market Ventures Inc.