Birmingham, Alabama Public Market Study

Market and Financial Feasibility

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Prepared For:

Jefferson County Truck Growers Association and
Alabama Farmers Market Authority

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Funded By:

Alabama Agricultural Land Grant Alliance (AALGA)

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February 27, 2007

Mr. Lawrence Calvert, President
Jefferson County Truck Growers Board of Directors
344 Finley Avenue, West
Birmingham, AL 35204

Dear Lawrence:

We are pleased to provide this draft for the Market and Financial Feasibility Study for the proposed Retail Expansion for the Birmingham Farmers' Market.

Our work to date has shown that there is great interest and potential support for the Public Market, as well as a number of complex issues that must be addressed. The draft study identifies these issues, as well as the decisions that must be made.

The work completed for the first phase of this study is intended to provide background information for an upcoming general members' meeting and other stakeholder meetings that will provide direction for the second phase of this work.

We have enjoyed working on this Study, and if you need further assistance please do not hesitate to call on us.

Sincerely,

James Bukenya	Joseph Molnar	Arthur Siaway
James O. Bukenya	Joseph J. Molnar	Arthur T. Siaway
Alabama A&M University	Auburn University	Tuskegee University

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EXECUTIVE SUMMARY

The Jefferson County Truck Growers Association (JCTGA) and the Alabama Farmers Market Authority (AFMA) determined a market and feasibility study was needed to better determine the potential of a new public market. The AFMA invited the Alabama Agricultural Land Grant Alliance (AALGA) and the United States Department of Agriculture (USDA) to provide the essential knowledge and research of key components. The Public Market will provide a prominent venue for Alabama based companies (small and large) to sell their products and will be a driving force behind the revitalization of Finley Avenue neighborhoods.

In the tradition of personal selling in the public realm, a Public Market is a retail place where vendors gather to sell local food from stalls, and consumers are attracted by the wide variety of locally produced food items. There are a wide range of types of Public Market operations and settings, including indoor and outdoor public spaces, permanent and temporary stalls, and permanent shops and restaurants. This study focuses on the "market hall" type of Public Market that consists of a permanent indoor facility with a variety of differently sized vendor stalls for permanent vendors, as well as temporary "day tables." Support facilities include dry and cold storage, as well as demonstration kitchens and areas for classes and educational programs. This type of Public Market typically has at least two- thirds of its stalls' square footage selling local products. The remaining area is occupied by stalls offering prepared, packaged, and specialty foods with a local focus, as well as hot foods and meals prepared on-site.

The Birmingham Public Market Study viewed two market trade areas in proximity to the existing Farmers Market. The primary market area was determined within a five mile radius and the secondary area was a ten mile radius. The study reflects positive numbers that are derived from key demographics and consumer surveys. The region's population projections for 2010 show the Birmingham-Hoover MSA will increase by 32,817 residents.

Demographic data collected included race, gender, age, household income, household composition, and consumer expenditure. The consumer survey focused on important issues such as current food shopping patterns, grocery spending, farmers market shopping and interest in a Birmingham Public Market. One central set of insights suggested that efforts to mobilize interest and support for the Public Market will have to feature events and activities that stimulate the contemporary interests and food expectations of younger, educated professionals.

Two central observations have emerged from the demographic data. First, both the trade areas and the overall region have grown at notable rates over the previous decade. The projected growth of the trade area and region suggests that new retail opportunities will need to be evaluated on a regular basis. Second, the projected trade area growth may bring contrasting tastes and shopping preferences among new and long term residents. Public market vendors will need to be aware of these different preferences and be prepared to adapt to the needs of new consumer groups.

The demographic and consumer surveys conducted by the AALGA combined with consumer expenditure estimates for 2002 released by the United States Department of Labor, Bureau of Labor Statistics, estimate that the total annual sales from resident households within the Birmingham Public Market trade area would total approximately $12.3 million. This total does not include the consumers from outside the aforementioned areas.

Prospective vendors' participation was identified through established databases, websites, and field interviews. Large and small vendors have great pride in their products and expressed interest in having their products represented at the public market. They were concerned that knowledgeable representation of their products was an issue. Other key elements expressed by potential vendors were: kitchen facilities with proper refrigeration and preparation areas for cooking demonstrations and year around promotion of the public market's unique products. Many producers stated that the Buy Fresh, Buy Local marketing campaign has significantly increased sales for their products and that expansion of campaign will be a positive influence in driving sales of Alabama products at the Public Market.

The financial feasibility considered the contributing factors to determining the overall cost for the project; asset acquisition, site development, construction, etc. The total estimated cost for the Birmingham Public Market Project is ***$4,632,095***. The cost of the project is not likely to be recovered solely from vendor stall rental fees. For the debt to be amortized, over a realistic amount of time, funding is needed from outside sources. The JCTGA, AFMA, and the City of Birmingham are the primary stakeholders and are critical to the financial success of the project.

The City of Birmingham has a large stake in the tax revenue potential for the primary and secondary trade areas. The conservative estimate of potential annual tax revenue report is $966,558 for the Primary Trade Area. Similar estimate for the Secondary Trade Area is $140,000. These figures, coupled with the substantial profit potentials for the Jefferson County Growers Association in providing an outlet for Alabama products, serve as reasons for consideration of funding the augmentation project.

1 INTRODUCTION

Purpose of the Study

This feasibility study was commissioned by the Alabama Farmers Market Authority (AFMA) in cooperation with the Jefferson County Truck Growers Association (JCTGA). Upon initiating the study, AFMA invited different organizations including the Alabama Agricultural Land Grant Alliance (AALGA), and the United States Department of Agriculture (USDA) to participate in the effort. In support of AFMA's efforts, AALGA provided funding for this study. Thus, this first phase of a two-part feasibility study assesses the market support and financial feasibility of a Public Market concept, and is focused on developing the concept and the property to be purchased adjacent to the existing BFM site.

This report focuses on the following key questions:

1. Will the Birmingham region generate sufficient customer demand, and potential vendor interest to support an Expanded Retail/Public Market with a range of fresh, high-quality, locally-produced food?
2. Can the Market achieve long-term viability and operate on a break-even basis without ongoing public subsidy?
3. Does the BFM site, which requires substantial rehabilitation, offer the opportunity to develop a feasible and functional Public Market?
4. Will locating the proposed Public Market in this site stimulate neighborhood revitalization?
5. How large should the Expanded Retail/Public Market be, and what will be the likely development and operating costs, and the potential up-front public investment that is needed for its establishment?
6. What additional adjacent properties may be needed for the proposed Public Market, and what development issues will have to be addressed to create a successful project?

Study Approach

To help answer these questions, a team of researchers from Alabama A&M University, Auburn University, and Tuskegee University completed the following activities:

- Surveyed potential consumers and estimated potential demand from residents, downtown employees, and visitors to Birmingham.
- Surveyed potential vendors for interest in occupying space at the Market.
- Conducted an initial architectural assessment of the Public Market for feasibility and conceptual layout.
- Analyzed potential Public Market operations and developed projections for operating revenues and expenses.

Report Contents

This report describes public markets, analyzes potential customers and vendors, and estimates supportable market demand in terms of sales. The report then summarizes an architectural engineering assessment of the building and site, leading to the identification of three development concepts. Each concept is tested for financial feasibility, leading to a series of observations about the feasibility and practicality of a Public Market located adjacent to the Birmingham Farmers Market.

2 BIRMINGHAM FARMERS MARKET BACKGROUND

History of the Market

In 1921, produce growers in Jefferson County saw the need for a place to market their produce. Eighteen members met and formed Jefferson County Truck Growers Association and chartered it with the State. The market since that time has had six locations. It has been at its present location since 1956. The market is situated on 49 acres of land. The Birmingham Farmers Market (BFM) has warehouse space of 61 bays, each about 25 X 50 feet. These bays are rented to 14 dealers, selling all types of produce. Currently, the market has 11 open sheds, each 30 X 200 feet. Six of these sheds are reserved for Alabama Farmers only, two sheds are for retail produce dealers, and three sheds are for wholesale produce dealers.

In order to become a member of the Association, one must be a produce grower in the State of Alabama. The Birmingham Farmers Market has 207 members from as far north as Limestone County, to as far south as Geneva County.

The Birmingham Farmers Market has nine members of the Board of Directors. All are produce growers, elected from the membership to three-year term. They will elect a President, Vice-President, and Treasurer. They employ a Secretary-Manager for daily operation of the business. The Association has 20 employees, two maintain operation of the office, eight are security personnel (one on the yard and one at the gate at all times), six are clean up, two are maintenance, and one supervisor of the Flea Market.

The Birmingham Farmers Market has its own compactor for disposal of garbage and a bailer for the disposal of cardboard. The total of employees of the Association and dealers are approximately 200 with an annual payroll of 2 million dollars.

The amount of produce sold on the Birmingham Farmers Market is in excess of 350 million dollars, approximately 50 million in the state alone. Anyone growing produce is welcome to use this Market. The Birmingham Farmers Market has between 2,000 and 2,500 farmers—large and small—who use this Market annually. The Market is solely owned and operated by Alabama farmers. It is fully self-supporting, receiving no outside funds.

What is A Public Market?

In the tradition of personal selling in the public realm, a Public Market is a retail place where vendors gather to sell local food from stalls, and consumers are attracted by the wide variety of locally produced food items. There are a wide range of types of Public Market operations and settings, including indoor and outdoor public spaces, permanent and temporary stalls, and permanent shops and restaurants. The Project for Public

Spaces[1] (PPS) has identified three characteristics that distinguish Public Markets[1] from other types of retail activity:

1. *Public Markets have public goals.* These can include helping preserve local agriculture, revitalization of a commercial district, and increasing small business opportunities.
2. *Public Markets create public spaces.* They help create a safe, inviting, and lively place that promotes interaction and community activities among a wide range of people.
3. *Public Markets contain locally owned, independent businesses.* Vendor stalls that are locally owned offer unique choices that are simply not available in more standard retail settings.

This study focuses on the "market hall" type of Public Market that consists of a permanent indoor facility with a variety of differently sized vendor stalls for permanent vendors, as well as temporary "day tables." Support facilities include dry and cold storage, as well as demonstration kitchens and areas for classes and educational programs. This type of Public Market typically has at least two- thirds of its stalls' square footage selling local products. The remaining area is occupied by stalls offering prepared, packaged, and specialty foods with a local focus, as well as hot foods and meals prepared on-site.

A Public Market is distinct from a Farmers Market. Farmers Markets are more seasonal, usually operate only a few days per week, and have a higher proportion of farmers selling directly to consumers. Public Markets are permanent, operating seven days per week year-round, and have both farmers and a larger number of other locally owned vendor stalls, resulting in a wider selection. Public Markets can be complementary to farmers markets, and the experience of other cities suggests that Birmingham can expect that having both of these types of markets will expand the overall demand for local products, allowing both types of markets to thrive.

Goals of the Birmingham Public Market

The proposed Birmingham Public Market seeks to establish a new type of food retailing in Alabama. A range of potential goals have been identified for the Market, which include the following:

- Establish a showplace that increases the visibility of Alabama agriculture and specialty food makers;
- Enhance the viability of local agriculture by providing ways for farmers to expand their offerings and customer base;
- Improve access to high-quality affordable local fresh foods for households of all income ranges;

[1] Project for Public Spaces is a non-profit organization involved in supporting the creation of Public Markets and high quality public spaces throughout the United States.

- Provide classes and other education programs to improve nutrition and consumer support of Alabama agriculture by increased knowledge of how to prepare meals using affordable and local fresh foods;
- Create new small business opportunities for makers and sellers of specialty and prepared food items;
- Promote revitalization of the Old Town area through a catalytic development of the a Public Market that attracts retail and other diverse, mixed-use development;
- Provide an amenity to support increased residential population in the Downtown area;
- Formulate a development and business plan that ensures the Public Market's long-term self-sufficiency without ongoing public investment; and
- Secure the future of the Public Market through renovation and establishment of new uses that generate sufficient revenues to ensure its long-term preservation. This list of goals for the project is expected to evolve as planning proceeds and new opportunities are identified.

Downtown Revitalization

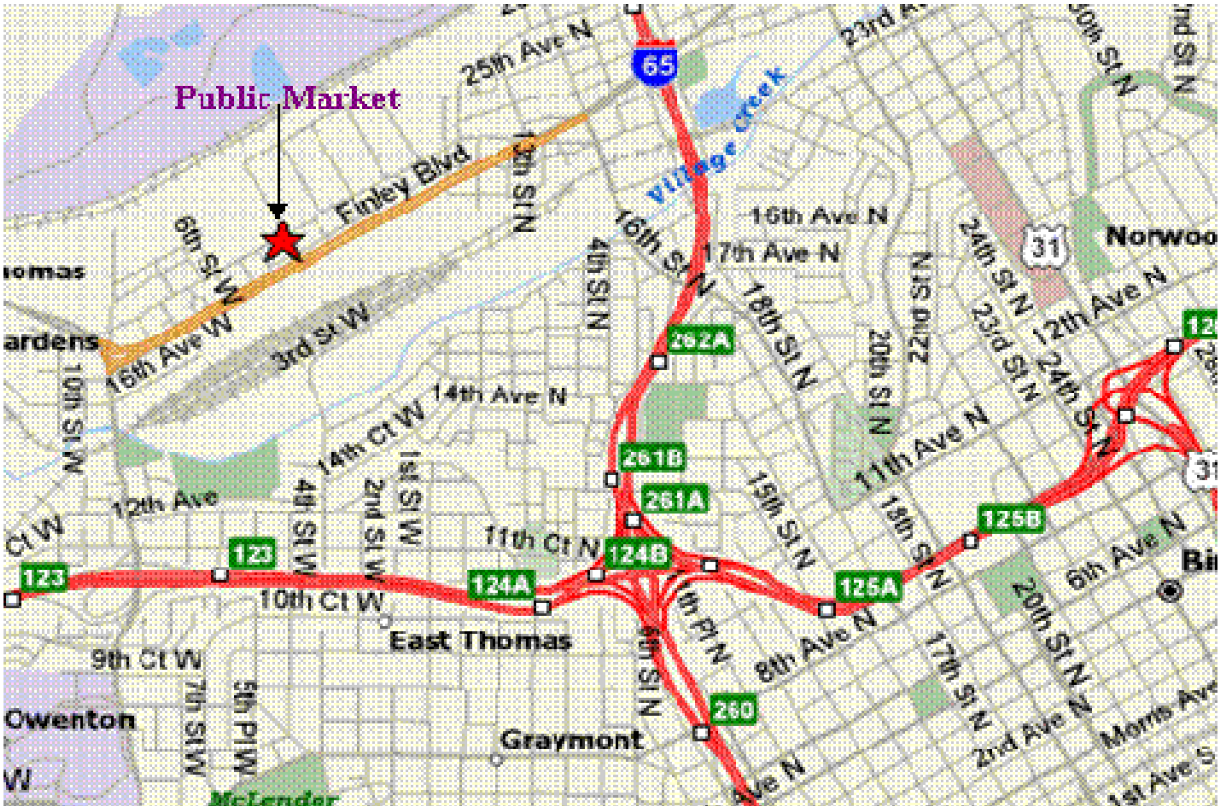
The proposed Birmingham Public Market would be consistent with municipal and other revitalization activities because it would activate the surrounding street area with retail uses that would draw shoppers. Such retail activity will create "eyes on the street" to discourage inappropriate activities in the area and address public concerns about safety.

Some sources envision a revitalization strategy that would construct new residential units, including substantial amounts of new affordable housing. New residential development may create substantial additional demand for the Public Market vendors, restaurants, and related retail will provide an important amenity for the new residential community.

The Public Market and redevelopment for the old Thomas rail yard area of Birmingham are identified as important activities. One initiative envisioned a potential new mixed-use development with over 160 residential units. The proximity of other restaurants to the Public Market may create opportunities for joint use parking facilities shared with the Public Market.

Other Downtown goals that support the attractiveness of the area and its attraction to a wide range of users include developing major public open space; developing a high density retail / office core area; promoting preservation of historic buildings and districts (Birmingham has a large collection of historic buildings); maintaining existing affordable housing and promoting additional new mixed-income housing; and ensuring sufficient transportation facilities to maintain accessibility and accommodate growth. Figure 1 shows the proposed Public Market location, and the proximity to other central Birmingham locations.

Figure 1: Location of the Proposed Birmingham Public Market



3 CUSTOMER MARKET ANALYSIS

Objective

The main objective of the demand analysis is to investigate whether there is sufficient customer demand to support the proposed Public Market. Conducting a market demand analysis will enable us to identify opportunities for economic growth based on factors such as the existing business mix, resident purchasing power and consumer spending patterns within a trade area.

The analysis is designed with the assumption that the proposed market will facilitate an important public service by providing Alabama producers with an additional market outlet and simultaneously provide Alabama consumers with easy access to local foods. In addition, the market has considerable potential to serve as a viable community development project for the old Thomas area of Birmingham. It also is an economic strategy to showcase Alabama's high quality agricultural/aquaculture products and its complementary value-added products.

To ensure its success however, the following key concepts must be considered:

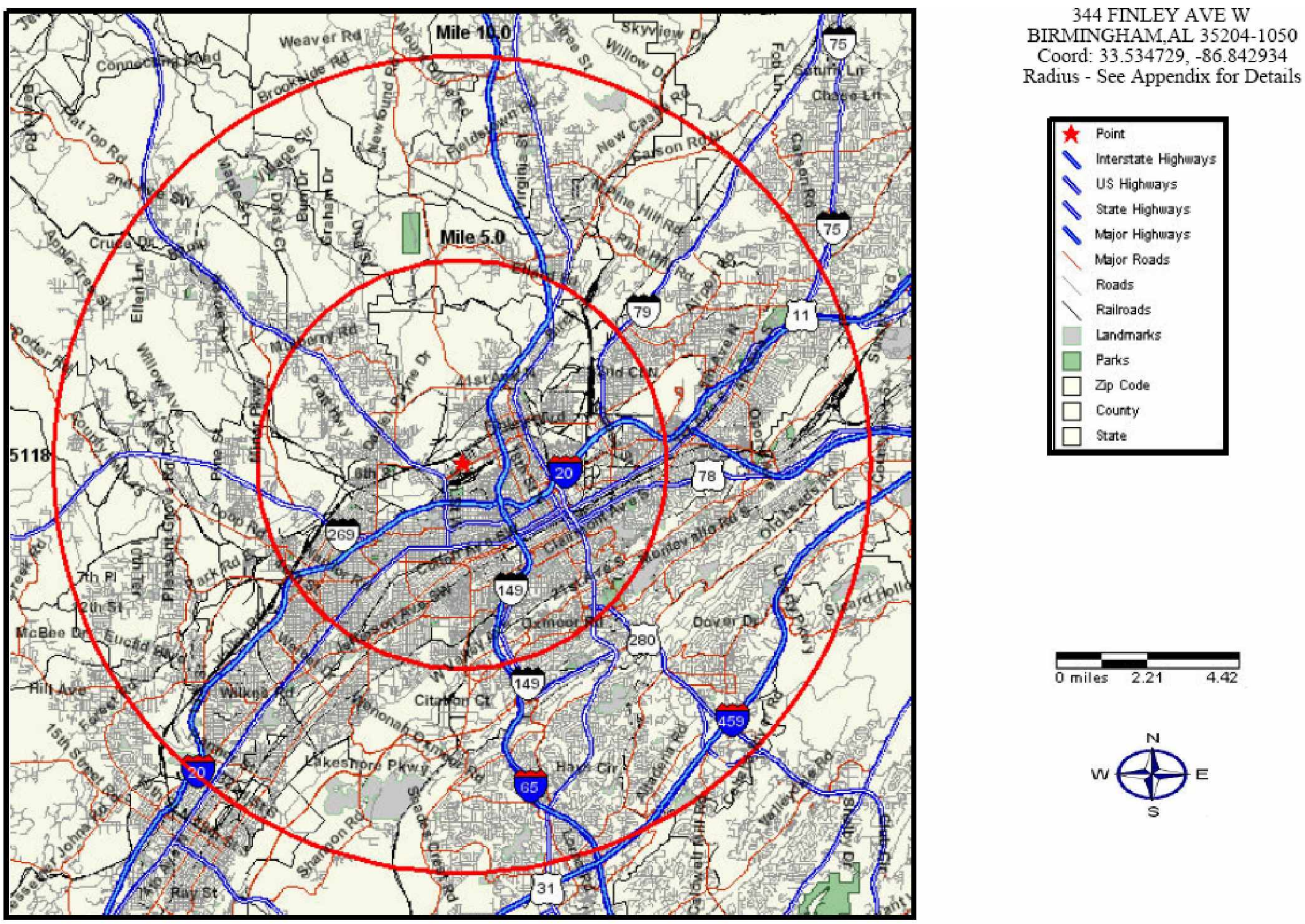
1. The presence of a sufficient customer demand and vendor supply to support such a market;
2. Appropriate mix of product offerings, presentations and special events in the proposed Public Market, combined with an exciting and aesthetic atmosphere must be developed;
3. Active cooperation by the state and local governments in establishing policy, regulation through certification of operators, permitting of concessionaires, and monitoring of public access.
4. Operating a Public Market will require that policy be determined through a consensus--building process that includes farmers, retailers, restaurant owners, manufacturers, tourism promoters, banks, other participants and local communities.
5. A functional Market design that will allow customers to experience fully the uniqueness of the proposed Public Market.

Defining the Study Area

For purposes of demographic trends and local resident survey research, this study defines two immediate market areas: primary and secondary. Both the experience of other public markets and the characteristics of Birmingham helped shape the trade area decision. The Primary Market Area is the area surrounding the existing Farmers Market (at 344 Finley Avenue, West) up to a five-mile radius (Figure 2).

For residents living in this five-mile ring, the future Public Market can become a destination for weekly shopping needs, similar to a typical grocery store. In addition, this study examines a "Secondary Market Area," defined as a ten-mile ring surrounding the site. This market area can also serve as a frequent grocery source for downtown workers, but would likely compete heavily with other grocery shopping options that may be closer to home, specifically traditional grocery stores and super markets. The primary trade area is approximately 144.5 square miles while the secondary trade area is approximately 497.74 square miles. Figure 2 shows both the "Primary" and "Secondary" market areas used in this study as the center point for trade area analysis.

Figure 2: Boundaries of the Proposed Market Trade Areas



Demographic Trends

Demographic and lifestyle characteristics of trade area residents provide valuable information on consumer spending potential and purchasing preferences. Demographic characteristics are also important to developing promotional and marketing strategies. Accordingly, this section examines a number of key demographic and lifestyle categories within the proposed market area.

Understanding the demographics of potential Public Market consumers requires examining the primary and secondary trade areas in context with the broader region and the state. In this study, the broader region is defined to include: Birmingham-Hoover Metropolitan Statistical Area (MSA), Jefferson County, Alabama. Using the broader region and the state as baselines will help to differentiate characteristics of local customers and determine potential demographic niches

To provide these comparisons, the following demographic tables (Tables B-1 through B-8 in Appendix B) compare the primary and secondary trade areas with data for the broader region and the state of Alabama. Comparison data are derived primarily from the 1990 and 2000 Decennial U.S. Census. To understand current and future shifts in the market, we also obtained current demographic estimates and projections from ESRI Business Analyst (ESRI, 2006).

Market Service Area

Population is defined as all persons living in a geographic area and is the basis for quantifying consumer demand. Table B-1 compares population data for 1990, 2000, 2005 and 2010 projections. Population in the primary and secondary trade areas has declined at higher rates (-2.3% and -0.61, respectively) than the broader region (Birmingham-Hoover MSA, 2.9% and Jefferson County, -.8%) and the state (1.9%) between 2000 and 2005. The good news for the region is that current population projections for 2010 show a market area that exhibit growing consumer potential at 0.9 percent and 1.4 percent growth rates in the primary and secondary trade areas, respectively. The notable growth rates in Birmingham-Hoover MSA also show a potential for a growing market. [2]

Although projections such as these are not necessarily reliable, if the population grows at the rates predicted in Table B-1, the primary and secondary trade areas will increase by almost 1,555 and 5,943 residents, respectively by the year 2010. Similarly, Birmingham-Hoover MSA will increase by almost 32,817 residents. The addition of these residents will have two significant impacts:

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[2] For demographic and trend analysis, the trade area is defined as all US Census block groups located within five-miles (primary area) and ten-mile (secondary area) radius of the proposed site, 344 Finley Avenue West.

- New residents will generate additional demand for goods and services in the trade area. Subsequently, opportunities for retail expansion should be evaluated on a regular basis as the population increases.
- A notable proportion of the population increase will likely come from in-migrants relocating from other areas. If these newcomers come from non southern states, their shopping habits and community attitudes may be somewhat different from long time residents. Recent research (Ryan, 2004) suggests that assessing the differences between newcomers and long term residents can be crucial to planning for future retail expansion. Investigating each group's attitude toward the trade area's shopping opportunities will be vital to staying in-sync with the area's dynamic population.

It is imperative to note also that despite the trade areas' relatively lower population growth rate, the market's ideal location at the intersection of I-20 and I-65 and within close distance to I-459 places it within easy driving distance for residents of surrounding neighborhoods and in-and out of state travelers. If these consumers are pursued, this may create substantial additional demand for the Public Market vendors.

Race and Gender

Table B-2 shows that in 2005 population in the primary and secondary trade areas was predominantly Black (about 76%, 52%, respectively). White residents accounted for 21 percent of the population in the primary trade area and 45 percent in the secondary trade area, while about 3 percent of the population in both trade areas was classified into "other" categories. When compared to broader region and the state, these figures are different. For instance, Black residents account for only 26 percent of the population in Birmingham-Hoover MSA, 38 percent in Jefferson County and 26 percent in the state. As for gender, the primary and secondary trade areas have similar distribution, which is parallel to that of Birmingham-Hoover MSA, Jefferson County and the state, with over half of the population being female.

Age Distribution

Age is an important predictor of a consumer's spending patterns. Table B-3 depicts the age distribution in the trade areas. Overall, the population distribution in each area is somewhat similar, with median age ranging from 35 years in the primary trade area to 37 years in the secondary trade area. Specifically, more than a third of the trade area's population was between the ages of 35 and 64, based on 2005 data. Furthermore, an additional 14 percent of the trade area's population was 65 years old and over. While the age distribution may change as new residents move to the trade areas, these two age groups (35-64 and 64 and over) are key consumer groups and will continue to be important as the Baby Boomers grow older. Nationally, those between the ages of 54 and 74 have the highest median net worth of any age group, and people between 40 to 64 years are typically the principal buyers at public markets. Furthermore, the Consumer Expenditure Survey shows that people 55 to 64 spend nine percent more than any other age group. While this age group currently comprises only 10 percent of the trade area, it will continue to grow as the Baby Boomers retire.

Household Income

Household income is an indicator for the spending power of residents. Household income positively correlates with retail expenditures in many product categories. Incomes also suggest appropriate price points for vendors focusing on the local market. However, income should not be used as the only indicator for the market's purchasing power and spending preferences.

Table B-4 shows household incomes for the trade areas, city of Birmingham, Jefferson County, State of Alabama and the nation in 2000. The data suggests that the primary trade area is mainly composed of low-income households (i.e., over 50 percent of household earn less than $25,000) and has relatively fewer (about 26%) households in the middle-class income bracket (between $35,000 and $75,000) than both Jefferson County and the State of Alabama. The distribution of income suggests that the primary trade area's spending potential may be slightly lower than the county and state averages for many goods and services. In contrast, the secondary trade area has a relatively high percentage of middle-to-upper income households. Overall, the high percentage of lower income households in the primary and secondary trade areas (Figures 3 and 4) suggests that the percentage of sales that the Public Market can expect to capture from local residents should be lower than public markets in more affluent communities.

Data on per capita income levels in each trade area are also provided in Table B-4 to indicate the average income available in the trade areas, if income were equalized per person. It is not meant to suggest that each person actually has access to that much income. Per capita income nonetheless is a good relative measure of the spending potential in each trade area. Also included in the table are information on median household incomes, and statistics that indicate where the midpoint would be if we rank ordered households by income (please note that this is not an average). The median tells us that fifty percent of households would have less than that amount of income and fifty percent of households would have more than that amount of income.

In 2005, the primary trade area had per capita income of $18,003, a 12 percent increase from its $16,103 in 2000. Despite the increase, the figure is far below the county and state figures. Current projections show the primary area's per capita income to increase by 17 percent to $21,027 by 2010. In contrast, the secondary trade area's per capita income figure ($24,488) in 2005 is slightly higher than per capita incomes in Jefferson County and the State of Alabama, and current projections suggest a 19 percent increase by the year 2010.

Looking at median household income, the primary market area's figure in 2005 was $27,838, indicating that half of the households in the primary trade area would have more and half would have less than $27,838 (Table B-4). For the secondary trade area, median income in 2005 was $38,031 compared to $38,230 and $36,131 for the Jefferson County and the State of Alabama, respectively.

Household Composition

Households can be composed of people living alone, families with or without children, single parent households, or a number of unrelated people living together. The differences in these household structures are primary indicators for identifying several retail opportunities. Households with children point to opportunities for goods and services desirable to kids. Married-couple families typically have higher incomes than single parent families. Furthermore, married households without children typically have more discretionary income available for dining out, travel, etc.

Table B-5 shows that family households are the dominant household type in both primary and secondary trade areas. Most of these family households are non-married-couple families without children under 18 years. However, when compared to Birmingham-Hoover MSA, both trade areas have a larger percentage of married couple households but smaller percentages when compared to the State of Alabama.

Housing Tenure and Occupancy Rate

Housing tenure refers to the number of owner-occupied and renter- occupied housing units. These statistics are valuable in analyzing the number of potential buyers of different home-related products and services in a Public Market in different time periods. Table B-5 shows that the primary trade area has a relatively low percentage (43%) of owner-occupied housing units when compared to the secondary trade area which has a 57 percent own-occupancy rate.

Education Attainment

Educational attainment is an alternative indicator of the socio-economic status of an area. Because income increases with advancing educational attainment, many retailers focus on income levels rather than education. The reported statistics on education attainment (Table B-6) present percentages of the population, aged 25 and over, who have attained six levels of education: less than high school, high school graduates, some college but no degree, associate degree, bachelors degree and graduate or professional degree. The data shows that the primary trade area has a smaller percentage of people with a college degree or higher than either Jefferson County or the State of Alabama. On the contrary, the secondary trade area has a higher percentage of people with a college degree or higher than Jefferson County and the State of Alabama. In general, the educational levels of the primary trade area residents do not suggest any large differences in consumer demand when compared to other communities of a similar market position. As the primary trade area grows, educational attainment levels may change as well.

Occupation Distribution by Industry

Table B-7 provides information on the number of jobs according to industry and occupation categories. Many retailers use concentration of white or blue-collar workers as another gauge of a market's taste preferences. The primary trade area had a total of 67,019 jobs in year 2005, of which 58 percent were white collar and 20 percent blue collar occupations. Civilian unemployment rate in this trade area was a little over 13 percent. In comparison, the secondary trade area had a total of 181,551 jobs of which 66 percent were white collar and 18 percent were blue collar occupations. The area's civilian unemployment rate was much lower at 9 percent. The principal occupation category in both trade areas was service industry accounting for roughly 50 percent of all jobs in the areas. This was followed by retail trade at 11 percent, financial, insurance and real estate at 9 percent and manufacturing at 7 percent.

Consumer Expenditure

Based on the demographic profile of area residents and typical expenditure patterns as determined by the Bureau of Labor Statistics' Consumer Expenditure Survey, the ESRI Business Analyst on Line estimated the retail sales potential for consumer goods. The statistics in Table B-8 are based on their estimates.

Conclusions

Overall, it is imperative to recognize that public markets attract a wide range of shoppers in terms of age, ethnicity, and income level. Often, families buy more fresh food than individuals or people living in unrelated households, as do people with income levels above $50,000. This finding is not universal, however. At the Lexington Market in downtown Baltimore, Market Ventures, Inc. (2004) found an inverse relationship between income and expenditures, with customers from lower income households spending more than customers with higher incomes. The highest spending customer is typically a 40 to 55 year old woman. What is unique about public markets, however, is their ability to appeal to both the highest income shoppers and lower income shoppers. While higher income shoppers might be drawn by unique products and superior quality, lower income and elderly shoppers appreciate the ability to purchase smaller quantities, the ability to negotiate with empowered owners, ethnic specialties, and competitive prices.

In conclusion, the following observations have emerged from the demographic data:

- Both the trade areas and the overall region have grown at notable rates over the previous decade. The projected growth of the trade area and region suggests that new retail opportunities will need to be evaluated on a regular basis.

- The projected trade area growth may bring contrasting tastes and shopping preferences among new and long term residents. In particular, many new residents may be attracted to the small town ambience offered by Birmingham, but still desire the services and selection found in larger cities. Public market vendors will need to be aware of these different preferences and be prepared to adapt to the needs of new consumer groups.

- When compared to the surrounding area, the trade area's household composition shows that married-couple households without children comprise a noteworthy portion of the market. These consumers typically have higher levels of discretionary income and provide an opportunity for retailers selling personal care items and specialty foods. Many of these households may also spend a larger portion of their income on dining out.

- While the primary trade area households have moderate incomes, the market is a favorable geographic position to access higher income households in the Birmingham-Hoover MSA, and its surrounding communities within commuting distance to Birmingham. Reaching these households will require developing additional destination retail opportunities and creating a marketing plan. Subsequently, these households present a longer-term opportunity.

- Trade area residents age 55 and over are a key consumer segment that will continue to remain important as the area's Baby Boomers age. Given the percentage of trade area residents that are considered to be Baby Boomers, the age 55 and over consumer segment will likely grow over the coming decades. Marketing strategies for reaching this consumer segment might include:

    1. Providing Detailed Information about Products – These consumers have time to research products and want the best value for their money.

    2. Stressing Customer Service – Older consumers are more likely to develop personal ties to local businesses.

    3. Proper Signage – The United States Sign Council has recommended that most signs need to be 30 percent larger for proper legibility.

    4. Nearby Parking and Pedestrian Access – Access will be a key for older customers as their ability to drive and walk diminishes with age.

4 POTENTIAL DEMAND FROM RESIDENTS: SURVEY RESULTS

In order to fully assess potential demand and interest in the Public Market among Birmingham's residents, a telephone survey of Immediate Market Area (within ten miles radius of the site) was conducted. This section summarizes survey findings and estimates potential sales from this key market segment.

Household Survey Methods

The survey instrument was developed by researchers at three land grant universities (Alabama A&M University, Auburn University and Tuskegee University), based on similar shopper telephone surveys administered in other communities (such as the Portland, Oregon communities) related to food shopping and public market demand. A draft survey was created and circulated to the Alabama Farmers Market Authority and the Auburn University Survey Research Center’s staff for review and comment. The draft survey was also pre-tested. These reviews led to a revised survey, which is included in Appendix B. During the first night of live interviewing, interviewers were asked to provide feedback about how the survey was being received - e.g. are there any questions that seem to be confusing for respondents, are we losing respondents at a particular point in the survey, etc. Everything seemed to go well, so no changes were made to the survey after the first night.

The telephone resident survey was conducted using a random sample of listed telephone numbers purchased from a sampling company - Survey Sampling, International (Located in CT). The calls were conducted by the Center for Governmental Services Survey Research Lab (CGSSRL) at Auburn University. Phone numbers were organized by zip code[3], with the CGSSRL choosing those zip codes that are primarily located within ten miles of the market site. Calls were made in evening from 5:00 to 9:00 pm, and during the day on weekends (typically from 11:00am to 5:00pm on Saturdays and 1:00pm to 6:00pm on Sundays) from July 6th to July 21st. A total of 14,069 call attempts were made in order to obtain the 502 completed interviews. The average number of call attempts per telephone number was 2.26.

Profile of Respondents

The break down of the respondents is 53 percent Caucasian/White and 42 percent African-American/Black. Another 3 percent was classified as other races while 2 percent (10 out of 502 respondents) did not respond to the race question. When asked if they consider themselves to be of Hispanic origin, only 4 percent (18 out of 502 respondents) answered yes. In terms of marital status, 53 percent of the respondents are married

[3] See appendix question 35 for the zip codes surveyed.

while 41 percent are single, divorced or widowed. About 49 percent of the respondents lived in households with only one or two people. Another 24 percent lived in three-person households, while 23 percent lived in households with four to five people. The majority (61 percent) of the sample indicated having no children under 18 living in the household.

As for age, approximately 55 percent of the respondents were between the ages of 26 to 55. The respondents are highly educated with 68 percent of the total sample having at least some college education. Although over 37 percent of the respondents (189 out of 502) did not answer the household income question, approximately 33 percent of those who responded reported household income of $50,000 or more. These demographics are consistent with area demographics where average household size was 2.3 persons per household and 42 percent were age 25 to 54. This sample also has similar incomes to what was reported for the immediate market area in the 2000 census.

Current Food Shopping Patterns

A set of questions asked respondents about the time of day and portion of the week during which they do most of their grocery shopping. About 56 percent shop evenly between weekdays and weekends, with another 23 percent favoring weekdays. The most popular time of day was the mornings (before 11:30 am), with about 28 percent selecting this time period. Another 28 percent favored the afternoons (1:30 to 5 pm) for their most typical food shopping time period, and another 26 percent favored the early evening hours for their most typical food shopping time period (5 pm to 8 pm). A small percent of the shoppers (6 percent) stated that lunchtime was the most favored shopping period of the day (11:30 am to 1:30 pm).

In terms of the most popular grocery store among respondents (i.e. where they "do most of their shopping"), Wal-Mart attracted 27 percent of the responses. The next most popular grocery store was Publix, garnering 19 percent of responses, followed by Piggly Wiggly with 13 percent of responses. Other popular grocery store destinations included Food World (11 percent), Winn Dixie (9percent), and Bruno’s (7 percent).

Just over 51 percent shopped at their favorite store either every day or at least two to three times per week (frequent shoppers). Another 33 percent shopped at least once per week at their favorite store. For the majority of the respondents (69 percent) the predominant trip to their first-choice store originates from home, with only eighteen percent of the remaining respondents traveling to their grocery stop directly from work. Over half of the respondents (54 percent) reported that the time to travel to their first-choice store was less than ten minutes; and automobile was the dominant means of travel (with 97 percent of the responses).

Two reasons for selecting the first-choice store were accepted from each respondent and tabulated in combination as well as separately. When looking at the combined frequency of answers. "Selection" accounted for the most popular reason with 25 percent of responses. Selection of produce, organic products, and meat were important among those who chose there primary grocery store based on selection. "Convenient to home" accounted for the next most popular reason with 24 percent of responses. "Prices" accounted for the third most-popular reason, with a combined 16 percent of responses selecting this factor. "Quality of merchandise" was the fourth most-frequently mentioned reason, with a combined count of eleven percent of all responses.

The first reason given for visiting the primary store were also cross tabulated by the store name, in order to track shopper preferences. Shoppers’ at large conventional grocery stores such as Wal-Mart and Publix were primarily interested in the convenience of the location to home and prices. At specialty and high-end grocers such as Piggly Wiggly, Southern Family Market, and Food Land, other factors such as selection, quality, and customer service were more important. Thinking of the Public Market, this data suggests that while convenience to home and price remains the predominate reason for choosing ones primary grocery store, among shoppers interested in specialty and high-end grocery items, selection and quality predominate.

The survey also asked about the next most-frequented grocery store, on the assumption that residents shop at more than one grocery store to round out their food purchases. All but 32 of the respondents mentioned a second-choice store, with Wal-Mart again ranked the most popular (19 percent of responses to this question). Winn Dixie ranked second highest, with 12 percent followed by Piggly Wiggly and Food World both with 13 percent of respondents mentioning each of these stores. Interestingly, Publix only attracted 9 percent of responses to this question while Bruno’s attracted 8 percent as their second-choice store.

The reasons for selecting the second-choice store varied compared to the primary store. In this case, price was the predominate reason for choosing ones store, with 18 percent of the responses. Convenient location was the second most common response with 15 percent, followed by “easiness to get in and out quickly” with 11 percent of the responses. Selection followed with 10 percent of combined responses. Among those focused on selection, selection of meats was the most common response, although selection of produce, organic products, and specialty items also factored. Convenience to home ranked fifth with 8 percent of the responses.

General Opinions

The survey also probed for more general opinions regarding quality, price, and selection of various types of food. When asked which is more important overall, quality or price, when deciding where to shop for food, 70 percent stated "quality," and only 18 percent stated "price." About 59 of respondents (12 percent) did not know or did not have an opinion on this question. When asked about more specific factors influencing the decision to shop at the proposed Public Market, several interesting patterns emerged. A full 77 percent rated "competitive prices with super markets" as very important in their store selection.

Other key factors included "open in the evenings on weekdays" (63 percent rated as very important), "open in the evenings on weekends" (62 percent rated as very important), "selection of fresh meats" (59 percent rated as very important), "selection of fresh fish" (51 percent rated as very important), and "selection of breads/bakery items (38 percent rated as very important). When thinking about traveling to the Public Market, over 87 percent of the respondents rated the availability of "free parking" as very important. "Nearby parking" was rated as very important by 81 percent of the respondents followed by "presence of security" (67 percent), "accessibility" (64 percent) and "distance from home was rated as very important by 67 percent of the respondents.

In terms of ethnic foodstuffs, the most popular type by far besides American and Soul Food, was Italian, garnering 17 percent of responses to the question of "what types of ethnic food if any do you typically like prepared at home." If all forms of "Asian" food are added together, this broad category garnered a 16 percent response (but was segmented by 9 percent Chinese, 3 percent "general Asian," 3 percent Japanese and one percent Thai). Mexican was the next most popular response with 15 percent of responses to this question. A small 2 percent either did not buy ethnic food, or had no opinion.

The survey also asked specifically about the importance of factors related to place of origin and the use of pesticides and/or artificial preservatives for produce, meat/fish/poultry, and cheese/dairy products. In all three food categories, most respondents rated grown without pesticides/artificial preservatives quite high, with a range of 83 percent stating this was very/somewhat important for produce, 80 percent for meat/fish, and 78 percent for cheese/dairy products. When asked about the importance of grown regionally (Alabama and United States), the produce and meat/fish categories were also rated as very/somewhat important to a great extent for United States but slightly lower for Alabama. The rates of this response for cheeses/dairy products dropped further for both regions (presumably allowing for a wider selection of these products). In a way, the expressed preferences for U.S. produced also echoed the preferences for locally grown items.

The questionnaire also collected respondents' opinions about education events: “how likely are you and your households to use the following education events that may be offered at the Public Market?” Gardening workshops, bookstore focusing on cooking/gardening, as well as cooking classes were rated as very likely education events by at least 30 percent of the respondents.

Grocery Spending

When asked about typical total expenditures on groceries per week, the spending patterns were revealing. About 39 percent of the total sample spent $50 to $99 per week on groceries and other foods prepared at home. Another 24 percent spent between \$100 and \$150 per week, and another 19 percent spent more than \$150 per week on groceries. About 7 percent of the respondents did not respond to this question or did not know. Thus, 63 percent of the sample spends about \$75 in a typical week or conservatively, \$10 a day on groceries and other foods prepared at home. These rates of spending are particularly strong when considering the small household sizes of the respondents. The \$10 per day grocery spending per household multiplied by 63 percent of the total sample (316 shoppers) that indicated spending at least \$75 per week results in approximately \$1.2 million in grocery sales annually.

Farmers Market Shopping

Next, the survey queried about respondents' knowledge about the Birmingham farmers market and patterns of shopping at the market. The majority of the respondents (94 percent) had heard of the Birmingham farmers market at the time of the survey. About 86 percent stated that they had shopped at the market while 52 percent of these respondents had visited the Birmingham farmers market in the past two years.

Interest in Birmingham Public Market

The final series of questions asked respondents about their interest in various aspects of the planned Public Market. First, respondents were asked about the likelihood of shopping at the Public Market if there was one in Birmingham. The majority of the respondents (69 percent) indicated that it is very likely or likely that they would shop at a Public Market in Birmingham if there were one, and another 23 percent indicated that it is somewhat likely that they would shop at a Public Market. Only a small percentage (8 percent) expressed reservations, did not know or had no opinion.

Next, respondents were asked about their expected frequency of shopping at the Public Market if it were open to at least 7:00pm and located at Finley Avenue West. A positive 37 percent expected to shop there several times per month. Another 26 percent expected to shop there at least once per month, while 16 percent indicated less than once per month, another 9 percent several times per week, and slightly over 10 percent stated that they would never shop there.

The survey also asked respondents if this location (Finley Avenue) would positively or negatively influence their interest in visiting the Public Market. Over 55 percent indicated positive influence while 29 percent said this location would have a negative influence. Fifteen percent had no opinion or were neutral. The most common reason given by those who indicated a positive influence was “close to home/convenient to home”, while “too far from home or work” was the most common reason among those who indicated negative influence.

Summary of the Survey Responses

The survey instrument contained questions related to respondents' socio-demographic characteristics, behaviors and attitudes toward shopping at public markets. First, the socio-demographic characteristics show that 53 percent of the respondents were Caucasian/White and 42 percent African-American/Black. Another 5 percent was classified as other races. In terms of marital status, 53 percent of the respondents were married while 47 percent were single, divorced or widowed. About 49 percent of the respondents lived in households with only one or two people. Another 24 percent lived in three-person households, while 27 percent lived in households with four or more people.

The majority (61 percent) of the sample indicated having no children under 18 living in the household. As for age, approximately 55 percent of the respondents were between the ages of 26 to 55. The respondents are highly educated with 68 percent of the total sample having at least some college education. Approximately 33 percent of those who responded to the income question reported household income of $50,000 or more. Compared with state averages from U.S. Census Bureau statistics (U.S. Census Bureau 2000), the sample demographics are fairly different from the state's demographics. For instance, 68 percent of the survey sample had some college level education or above versus 45 percent in the state; 33 percent of the survey sample reported annual income above $50,000 versus 42 percent in the state; and 53 percent of the survey sample was White versus 71 percent in the state.

For consumer behaviors and attitudes, a set of questions asked respondents about the time of day and portion of the week during which they do most of their grocery shopping. About 56 percent indicated shopping evenly between weekdays and weekends, with another 23 percent favoring weekdays. The most popular time of day was the mornings (before 11:30 am), with about 28 percent selecting this time period. Another 28 percent favored the afternoons (1:30 to 5 pm) for their most typical food shopping time period, and another 26 percent favored the early evening hours (5 pm to 8 pm). A small percent of respondents (6 percent) stated that lunchtime was the most favored shopping time of the day (11:30 am to 1:30 pm).

In terms of the most popular/first-choice grocery store among respondents (i.e. where they "do most of their shopping"), Wal-Mart attracted 27 percent of the responses. The next most popular grocery store was Publix, garnering 19 percent of the responses, followed by Piggly Wiggly with 13 percent of the responses. Other popular grocery store destinations included Food World (11 percent), Winn Dixie (9 percent), and Bruno's (7 percent).

Two reasons for selecting the first-choice store were accepted from each respondent and tabulated in combination as well as separately. When looking at the combined frequency of answers, "selection" accounted for the most popular reason with 25 percent of responses. Selection of produce, organic products, and meat were important among those who chose their primary grocery store based on selection. "Convenient to home" accounted for the next most popular reason with 24 percent of responses. "Prices" accounted for the third most-popular reason, with a combined 16 percent of responses selecting this factor. "Quality of merchandise" was the fourth most-frequently mentioned reason, with a combined count of eleven percent of all responses.

The survey results also suggest that freshness and quality followed by price are the most important factors that draw shoppers to farmers' markets, at all income levels. Particularly, lower-income consumers appear to be more interested in the basics of quality and price as compared to middle class consumers who more often cited "atmosphere", "variety of produce", and "buying from the farmer". Finally, over half of the respondents had visited Birmingham farmers' market during the past two years. Also, the average potential shopper has a positive attitude towards public markets and lives within four to six miles of the Birmingham Farmers' market.

5 POTENTIAL DEMAND FROM RESIDENTS: RETAIL MARKET ANALYSIS

The purpose of the customer demand analysis is to quantify the potential demand for fresh and prepared foods at a Public Market in the target area and to estimate how many square feet of retail space can be supported by the demand. The success of the Public Market will depend on attracting several key market segments to the facility on a continuous basis. The three key market segments — local area residents, downtown employees, and Birmingham area visitors — together will create the synergy and sales to support local vendors and permanent retailers.

Each of these market segments have different consumer characteristics in terms of fresh and prepared food spending, and each draws from a different geographic area. Overall, customer demand/market analysis consists of defining the market's trade areas and analyzing buying behavior in order to estimate potential expenditures for the different products to be sold in the Public Market.

To accomplish this and to derive baseline figures for the possible sales revenues that could be generated by the proposed market, the research team made an assumption that the proposed Birmingham Public Market will be able to capture on average a conservative 7 percent (primary trade area) and 5 percent (secondary trade area) of the total market sales in the trade areas. Although it is plausible to assume that based on the quality and size of the proposed market, larger market shares could be achieved, these conservative rates are used as baseline figures and any changes will affect the outcome of the analysis.

Consumer Expenditures in the Market Area

To calculate the potential consumer demand, we used consumer expenditure estimates for 2002 released by the U.S. Department of Labor, Bureau of Labor Statistics to determine the amount spent by residents in the defined trade areas. The Bureau of Labor Statistics conducts a nationwide survey of consumer units, also referred to as households, to determine the average amount spent by households of varying characteristics. Based on these data, the 600,168 residents in the primary and secondary trade areas of Birmingham spend over $1 billion on groceries and other food to be consumed at home (see Table 5-1).

Table 5-1: Alabama Consumer Expenditures, 2002

NAICS	Description	State Expenditure
4451	Grocery stores	415,613,872
44511	Supermarkets & other grocery	395,233,897
	Food away from home	259,809,029
4453	Beer, wine, & liquor stores	28,246,426
44512	Convenience stores	20,379,975
4452	Specialty food stores	13,081,990
44521	Meat markets	4,423,938
44529	Other specialty food stores	4,385,878
44523	Fruit & vegetable markets	2,770,917
445299	All other specialty food stores	1,637,702
44522	Fish & seafood markets	1,501,257
445291	Baked goods stores	1,395,372
445292	Confectionery & nut stores	1,352,804
	Total	**$1,149,833,057**

Source: U. S. Bureau of Census, Economic Census, 2002.

Trade Area Demand

To calculate trade area demand, annual, statewide per capita spending on groceries and other food items to be prepared at home is adjusted by the ratio of local-to-state per capita income. The result is then multiplied by the trade area population to calculate overall demand (See Table 5-2 for the detailed methodology). The resulting demand in 2002 dollars is $10,739,538 and $1,559,636 for primary and secondary trade areas, respectively (see Tables 2-4 and 2-6). Based on a 9 percent sales tax rate for Birmingham, this demand translates in $966,558 (Primary trade area) and $140,367 (Secondary trade area) sales tax revenue for the city of Birmingham.

In order to determine the retail space that could be supported by consumers residing in the trade area, we used data from the Urban Land Institute's Dollars and Cents of Shopping Centers for 2002 to estimate the sales per square feet. We then divided the market potential estimates (see Table 5-3 and 2-5) by these sales per square feet to determine the supportable square feet of retail space in the market trade area. The resulting demand for the primary and secondary trade areas is 317,013 square feet and 91,116 square feet, respectively.

Thus, it is estimated that the combined total annual sales from resident households within the Birmingham Public Market trade area would total approximately $12.3 million. This sales volume translates to approximately $1.1 million in sales tax revenue. When evaluated against a potential net rentable stall area of 17,000 square feet (including fresh and prepared foods), this sales volume equates to approximately $723 per square foot annually.

Table 5-2: Retail Market Demand Estimation Process, Birmingham

NAICS	44511		Supermarkets
Step 1	*Calculate Statewide per capita spending*		
A	A	$395,233,897	Statewide sales
B	B	4,486,508	State population
C	A/B	**$88.09**	Statewide per capita spending
Step 2	*Adjust for Differences in Trade Area per Capita Income*		
D	D	$16,111	Trade Area Per capita income
E	E	$18,189	State per capita income
F	D/E	0.89	Adjustment ratio
G	C x F	**78.03**	Trade area's purchasing power index
Step 3	*Calculate Trade Area Store Demand in Dollars*		
H	H	173,366	Trade area's population
I	G x H	**$13,527,681**	Trade area's store demand/potential sales
Step 4	*Calculate Trade Area Store Demand in Square Feet*		
J	J	$371.79	Average Sales per SF
K	I/J	**36,385**	Demand in SF
Step 5	*Calculate Potential Sales Tax Revenue*		
L	L	9%	State sales tax rate
M	M	8%	Public Market's expected market share
N	M x I	$1,082,214	Public Market's potential sales
O	N x L	**$97,399**	Public Market's potential sales revenue

Table 5-3: Estimated Retail Market Demand, Primary Trade Area

Description	Market Potential Index	Sales—Primary	Trade Area	Sales per ft^2
Grocery stores	107.64	45,918,396	372	123,506
Supermarkets & other grocery	102.36	43,666,749	372	117,450
Food away from home	67.29	28,704,561	700	41,007
Beer, wine, & liquor stores	7.32	3,120,759	250	12,500
Specialty food stores	3.39	1,445,342	163	8,891
Convenience stores	5.28	2,251,647	372	6,056
Other specialty food stores	1.14	484,566	163	2,981
Meat markets	1.15	488,771	372	1,315
All other specialty food stores	0.42	180,939	163	1,113
Fruit & vegetable markets	0.72	306,140	372	823
Confectionery & nut stores	0.35	149,462	320	467
Baked goods stores	0.36	154,165	336	459
Fish & seafood markets	0.39	165,864	372	446
Total	**686.50**	**$127,037,360**		**317,013**

Table 5-4: Potential Retail Market Demand for Birmingham Public Market—Primary Trade Area

Description	Sales—Primary Trade Area	Expected Market Share	Potential Sales	Potential Sales Tax Revenues (9%)
Grocery stores	45,918,396	10%	4,591,840	413,266
Supermarkets & other grocery	43,666,749	10%	4,366,675	393,001
Food away from home	28,704,561	4%	1,148,182	103,336
Convenience stores	2,251,647	10%	225,165	20,265
Beer, wine, & liquor stores	3,120,759	5%	156,038	14,043
Specialty food stores	1,445,342	8%	115,627	10,406
Meat markets	488,771	7%	34,214	3,079
Fruit & vegetable markets	306,140	10%	30,614	2,755
Other specialty food stores	484,566	6%	29,074	2,617
Baked goods stores	154,165	8%	12,333	1,110
All other specialty food stores	180,939	6%	10,856	977
Fish & seafood markets	165,864	6%	9,952	896
Confectionery & nut stores	149,462	6%	8,968	807
Total/Average	**$127,037,360**	**7%**	**$10,739,538**	**$966,558**

Table 5-5: Estimated Retail Market Demand, Secondary Trade Area

Description	Market Potential Index	Sales—Secondary Trade Area ft^2	Sales per Square Foot ($)	Supportable Square Feet
Grocery stores	82.05	4,225,227	372	38,261
Supermarkets/other grocery	78.03	13,527,681	372	36,385
Food away from home	22.66	3,927,630	700	5,611
Beer, wine, & liquor stores	5.58	966,791	250	3,872
Specialty food stores	2.58	47,758	163	2,754
Convenience stores	4.02	97,546	372	1,876
Other specialty food stores	0.87	50,116	163	923
Meat markets	0.87	51,418	372	407
All other specialty food store	0.32	56,054	163	345
Fruit & vegetable markets	0.55	94,840	372	255
Confectionery & nut stores	0.27	46,302	320	145
Baked goods stores	0.28	47,759	336	142
Fish & seafood markets	0.30	51,384	372	138
Total		**$7,079,327**		**91,116**

Table 5-6: Potential Retail Market Demand for Birmingham Public Market—Secondary Trade Area

Description	Sales—Secondary Trade Area	Expected Market Share	Potential Sales	Potential Sales Tax Revenues (9%)
Supermarkets & other grocery	13,527,681	8%	1,082,214	97,399
Grocery stores	4,225,227	8%	338,018	30,422
Food away from home	3,927,630	2%	78,553	7,070
Beer, wine, & liquor stores	966,791	3%	29,004	2,610
Convenience stores	97,546	8%	7,804	702
Fruit & vegetable markets	94,840	8%	7,587	683
Specialty food stores	47,758	6%	2,865	258
Baked goods stores	47,759	6%	2,866	258
Meat markets	51,418	5%	2,571	231
All other specialty food stores	56,054	4%	2,242	202
Fish & seafood markets	51,384	4%	2,055	185
Other specialty food stores	50,116	4%	2,005	180
Confectionery & nut stores	46,302	4%	1,852	167
Total/Average	**$7,079,327**	**5%**	**$1,559,636**	**$140,367**

Other Considerations

Not included in these figures is demand from potential consumers residing outside the trade area (including commuters, tourists/visitors). A considerable amount of demand could be generated by seasonal traffic including tourists, second homeowners and other travelers on I-20, I-65 and I-459.

Conclusion

Customer demand analysis quantifies the potential demand for fresh and prepared foods at a Public Market in the target area and to estimate how many square feet of retail space can be supported by the demand. The success of the Public Market will depend on attracting several key market segments to the facility on a continuous basis. The three key market segments — local area residents, downtown employees, and Birmingham area visitors — together will create the synergy and sales to support local vendors and permanent retailers.

We estimated the combined total annual sales from resident households within the Birmingham Public Market trade area to total approximately $12.3 million. This sales volume translates to approximately $1.1 million in sales tax revenue. When evaluated against a potential net rentable stall area of 17,000 square feet (including fresh and prepared foods), this sales volume equates to approximately $723 per square foot annually. These projections offer a promising basis for the Public Market at BFM.

6 POTENTIAL DEMAND FROM DOWNTOWN EMPLOYEES: SURVEY RESULTS

This section summarizes comparisons between survey responses of those who were employed in downtown Birmingham are compared with those who worked elsewhere. The data tables for this summary are found in the Appendix. The following narrative identifies statistically significant differences between those working downtown and notable patterns in the data that bear on the feasibility of the Public Market. We defined downtown employment broadly to include respondents whose place of work was in the central Birmingham zip codes that they reported in the survey interview.

Respondent Characteristics

The downtown workers have higher incomes than other respondents in the sample. About 64 percent of downtown workers report annual household incomes greater than $50 thousand compared to 45 percent of the rest of the sample.

Downtown workers were significantly more educated. Fifty-seven percent had college degrees where 37 percent of the others had college or postgraduate degrees.

Downtown workers were significantly younger. Twelve percent were under age 29 compared to 6 percent of the remainder of the sample. Forty-two percent of downtown workers were 50 or older, but 67 percent of the rest of the sample were over 49.

The two sample segments did not differ by racial composition, Hispanic status, or household composition. There were no statistically significant differences in household size.

Birmingham Farmers' Market Experiences

One set of questions asked about knowledge and experience with the Birmingham Farmers Market (BFM). No significant differences were found, as more than 95 percent knew about the BFM and more than half had visited it in the past two years.

More than 60 percent said they would be likely to shop at a Public Market. That not working downtown tended to suggest that they would shop the Public Market more often, but the comparison was not significant.

Food Shopping Preferences

Few differences were noted in the shopping experiences and preferences of downtown workers. More downtown workers went to their preferred grocery store from work, and the other respondents were more likely to travel from home.

The main reasons that each sample segmented favored their preferred store were similar. Convenience to home was more important for the downtown workers, 65 to 55 percent. Selection of produce was associated with a wide margin of difference, 5 percent of the downtown workers noted this reason in contrast to 36 percent of the others. Similarly, the downtown workers mentioned variety more often as a store shopping reason, 29 versus 9 percent. Other shopping patterns were relatively similar.

Significantly more downtown workers do their food shopping on weekends (25 versus 16 percent). Downtown workers also are significantly more likely to shop in the evenings, 36 versus 20 percent for other respondents. Those not working downtown were most likely to shop in the morning, 36 versus 21 percent.

One statistically significant difference was found for how respondents made their food shopping trips. More Birmingham workers went straight to the store from work (28 versus 11 percent). Other respondents generally went to the store straight from home (81 percent). Thus, the prospect of obtaining bread, milk, and other basic food items at comparable prices or as a loss leader may be an important consideration for Public Market visitors.

Alabama Products

Another line of questions addressed factors shaping food store shopping decisions. Downtown workers cared less about the Alabama origin of food products. About 38 percent of the other respondents thought that raised in Alabama was an important product characteristic, but only 26 percent of the downtown Birmingham workers thought so. This was the sole statistically significant difference for this group of items.

A series of survey questions asked about preferred characteristics of products shaping Public Market shopping. No statistically significant differences were noted between downtown workers and the rest of the sample. Competitive prices with super markets were rated as very important by 80 percent of the downtown workers. Evening hours, a selection of fresh meats, and fish were rated as very important by more than half the sample of downtown workers.

Respondents were asked about ethnic foods prepared at home. American, Italian, Mexican, soul food, and Chinese were the most popular. The only statistically significant difference was found for Mexican food, as half the downtown workers reported preparing it at home, compared to a third of the others.

Facility Preferences

More than 80 percent of the sample felt that free, nearby parking was very important for their patronage of the Public Market. About two-thirds felt that distance from home, accessibility from my house, and presence of a security guard were very important considerations.

Downtown workers were significantly more likely to be interested in cooking classes for adults. Events about agricultural issues were least likely to attract interest from respondents, as 18 percent of the downtown workers said they would be likely to attend such events.

The Decision to Visit

The Finley Avenue location of the Public Market is perceived as a positive influence on the decision to visit by half the sample. About 31 percent of the downtown workers think the location was a negative influence on their decision to visit.

Significantly more downtown workers do their food shopping on weekends (25 versus 16 percent). Downtown workers also are significantly more likely to shop in the evenings, 36 versus 20 percent for other respondents. Those not working downtown were most likely to shop in the morning, 36 versus 21 percent.

Conclusion

We compared survey responses of those who were employed in downtown Birmingham with those who worked elsewhere or were not employed. We defined downtown employment broadly to include respondents whose place of work was in the central Birmingham zip codes that they reported in the survey interview.

The downtown workers have higher incomes than other respondents in the sample. About 64 percent of downtown workers report annual household incomes greater than $50 thousand compared to 45 percent of the rest of the sample. Downtown workers were significantly more educated as 57 percent had college degrees where 37 percent of the others had college or postgraduate degrees. Downtown workers also were significantly younger.

Downtown workers cared less about the Alabama origin of food products. About 38 percent of the other respondents thought that raised in Alabama was an important product characteristic, but only 26 percent of the downtown Birmingham workers thought so.

More than 80 percent of the sample felt that free, nearby parking was very important for their patronage of the Public Market. About two-thirds felt that distance from home, accessibility from my house, and presence of a security guard were very important considerations.

Downtown workers were significantly more likely to be interested in cooking classes for adults. Events about agricultural issues were least likely to attract interest from respondents, as 18 percent of the downtown workers said they would be likely to attend such events.

Significantly more downtown workers do their food shopping on weekends (25 versus 16 percent). Downtown workers also are significantly more likely to shop in the evenings, 36 versus 20 percent for other respondents. Those not working downtown were most likely to shop in the morning, 36 versus 21 percent.

One central set of insights suggested that efforts to mobilize interest and support for the Public Market will have to feature events and activities that stimulate the contemporary interests and food expectations of younger, educated professionals, and not nostalgia for agriculture now past or a rural folk life that few have experienced or appreciate.

7 PROSPECTIVE VENDOR PARTICIPATION: SURVEY RESULTS

Objective

The main objective of the vendor analysis is to measure the interest among Alabama producers in participating in the proposed Birmingham Public Market. Conducting a vendor analysis will also enable us to identify the different types of food producers in the state of Alabama as well as assess their concerns involving distribution, consumer product demand, vendor stall features, and location concerning the Public Market.

Methods

It will be important to the Birmingham Public Market for Alabama producers to provide a fresh array of food products. The vendor analysis was carried out in different phases. The first phase was the collection of an Alabama product producer name database and then determining which producers would be interviewed. The second phase involved visiting Alabama food producer websites in order to collect information on the products available from Alabama food producers. The final phase included summaries of interview material to cover during the interviews with Alabama producers, conducting interviews, and analyzing the interview answers.

The collection of the Alabama vendor database involved using several different methods. The initial collection was found through using Internet search engines to collect Alabama food producer company names and contact information. There are many websites that collect producer information including LocalHarvest.com and many different food cooperative websites. The collection of vendor names also included visiting grocery stores in Alabama and checking food labels to determine which products were produced in Alabama.

Farmers markets were also visited to collect names and contact information for potential market vendors. The subsequent names in the vendor database came from vendor interviews. The final database collected the names, telephone numbers, and addresses of over 100 Alabama food product producers. The database includes names from many different food categories including items such as wine, cheese, meats, canned goods, packaged foods (grits, mill, granola, etc.), and baked goods to name a few. This list is believed to contain most of the items available from Alabama food product producers.

The interview topics were established by reviewing previous research conducted for the Portland Public Market and from meetings with the Birmingham Farmers Market board. The objectives of the interview questions were to get a general idea of vendor concerns for the market, vendor stall needs, and vendor customer needs. The interviews consisted of open-ended questions in order to let the vendor raise concerns and ideas for the proposed market. The interview topics included the following: interest in selling at the Public Market, interest in selling items that the vendor does not currently produce, preferred months of the year to sell, preferred days of the week to sell, type of lease preferred, interest in day tables, interest in conducting cooking demonstrations, their extensive product offering, their current product distribution, and their customer inquiries (organic, nutrition, cooking tips, and where grown).

Conversations were conducted mostly on the telephone and occasionally in person at a farmers market. In general, vendors were randomly selected for interview, but vendors with diverse product offerings were purposively selected. The average interview lasted from 35 to 45 minutes depending on the amount of vendor's concerns. Vendors were mostly excited to be talking about their product offering and enthusiastic about the prospect of a new place to distribute their product.

Characteristics of Alabama Producers

Alabama producers are distributed in different areas throughout the entire state. There are two different distinct categories of Alabama food producers. The largest category interviewed is small companies that are located in rural areas and have a very limited product offering and distribution capabilities. The other category included large corporate food producers that produce an assortment of food products for a particular food category and distribute their product throughout the United States. Most of the small companies interviewed have been in business for between two to five years with the large corporate food producers having been in business for 15 to 50 years. The small companies usually employ from one to five employees with the larger companies employing from fifty to four hundred employees.

Interest in Selling at the Public Market

Each of the 45 Alabama product producers we surveyed was asked about their interest in selling at the Public Market. The most central response is that the producers were interested as long as someone else sold the product for them. Most of the producers interviewed already had their products placed in many locations throughout Alabama, the Southeastern United States, and some throughout the continental U.S. They were accustomed to having their products purchased for resale by an established retail vendor and some of the smaller producers sold directly to consumers by attending a once a week farmers market.

Many of the producers live two hours away from Birmingham and were unsure that they would have the personnel to cover a vendor booth at the market. An Alabama condiment producer felt that if someone else sold her product for her she would "want them to be fully aware of what to use and how to prepare our product. Our name is on that (the bottle) and we take pride in our company's name. We wouldn't want just anyone to represent our company." Knowledgeable representation for their product was a common concern amongst the producers. A large sausage producer expressed that "we would only be interested if our products were for resale. Our company is not set up to directly sell our sausage to the public. We use a large distributor that places our products all over the southeast." Food products for resale reported to be the most common response when asked about the food producers' interest in selling at the Public Market.

The producers interested in selling at the Public Market had many different reasons for their interest (see Table 3.1. In order to increase sales was the most common response among respondents. An Alabama frozen food producer expressed that "the 'Buy Alabama' promotion has created a tremendous amount of response from customers. I think it's a great idea!" The positive response to Alabama food product marketing in the past led many producers to believe that the Public Market could greatly increase the sales of their product. Increased visibility was another common response from producers.

An Alabama grits producer said that she had "a big interest in the Slow Food Movement and would be interested in reaching customers with the same interests." The third most common response was to broaden the market segments for their products. Many of the smaller food producers expressed that the market would be provide a good way to enter the Birmingham customer market. All of the respondents interested in selling at the Public Market answered this question.

The producers that expressed no interest in selling at the market gave various reasons for their disinterest. An Alabama goat cheese producer said that he "did not know if he could generate enough products to sustain a year round market. We are stretched as it is to sell our product at two farmers markets in the state." A coffee producer for the state expressed that he "didn't want to compete against the company's current distributor by selling at a non-chain store." Many of the disinterested producers were unsure that the Finley Boulevard location would attract the right niche of customers for their specialty products. A snack food producer said, "I'm just not sure the area would be safe at night for the kinds of customers that we deal with. Our customers come from mostly Mountain Brook, Vestavia, and Forrest Park and I don't know if they would be willing to drive out there."

Only a few of the producers expressed an interest in selling items that they do not currently produce. Most felt that their company did not have enough personnel to consider selling another company's product.

Table 3.1: Reasons for Interest in Selling at the Public Market, Alabama Food Producers 2006

Interest	Comment	Product Classification
Increased sales	The 'Buy Alabama' thing has created a tremendous amount of response from customers. I think it's a great idea!	Pre-packaged foods
	Birmingham is a big market which would greatly increase our sales.	Baked goods
Increased visibility	We are always trying to reach new market segments and this would provide a great opportunity.	Beverages
	I have a big interest in the Slow Food Movement and would be interested in reaching new customers with the same interests.	Pre-packaged foods
	I would love to put the product out more and get our name known a little better.	Pre-packaged foods
Broadened market segments	Birmingham would be a new market for me and my sauce.	Condiments
	Anything to promote grass fed beef!	Animal products

Desired Stall Features

Each producer required specific stall features to compliment their product offering. The frozen food producers required freezers and the fresh food producers required refrigeration with many expressing interest in glass cases. The pre-packaged dry food producers required a table, display area, and a sample area. If the producer was provided with a sample area then they also expressed interest in a prep area as well as a sink. Most of the desired stall features were specific to the particular food product offering of the individual companies. The universal stall feature was a cash register in order to complete transactions.

Interest in Cooking Demonstrations

Almost all of the food producers interviewed had participated in a cooking demonstration in the past. Most of the producers found the demonstrations beneficial for their products sales. “Customers seem to enjoy watching the demonstrations and learning how to correctly prepare the sausages," replied an Alabama sausage maker. Cooking demonstrations were something that all producers were willing to participate in and seemed excited to learn that demonstrations would be a regular occurrence at the Public Market.

Advertising and Distribution

Many of the producers were concerned about the marketing portion for the market. One of the common concerns displayed about the Public Market was, "Will the market assist in advertising for the products?" The trouble most of the producers had was lack of funds for their current advertising. The producers wanted to be sure that if they signed a lease with the Public Market that there would be an assured customer interest in the market. The program of meetings and events at the meeting faculty on the site could be a significant source of customers for product vendors.

Potential vendors also had concerns dealing about product distribution (see Table 3.2). A syrup producer from South Alabama stated that "distribution is tough because of shipping and that sort of thing. Syrup is a very heavy and breakable product." Many of the producers do not have a food distributor to distribute their product. These producers were mainly distributing their products themselves once a week or as little as once a month. The location of the market presented obstacles for them mainly due to the distance from their business headquarters. A Northern Alabama honey producer said "I do this part time and mostly just for fun. Driving for two hours to Birmingham would not be cost effective and shipping the product is very expensive." Most of the larger food producers have corporate distribution already in place and expressed no problems with their current distribution.

Table 3.2: Forms of Distribution Preferred by Alabama Food Producers, 2006

Form of distribution	Comment	Product Classification
Corporate distribution	We've been using the Alabama Grocer's Association for three years to distribute our product in five southeastern states.	Frozen Foods
	Our coffee is roasted, distributed, and sold throughout Alabama through internal sales representatives.	Coffee
	We have used Tree of Life Distributors for over three years to distribute our beef, pork, and free-range eggs all over the United States.	Animal products
Farmers Markets only	It's only the two of us and it takes all of our time just to man two farmers markets per week.	Dry foods
	I only have enough flowers for the Pepper Place Market therefore, I am the sole distributor.	Flowers
Website	We've been using localharvest.com for two years now and are extremely happy with the amount of business it generates.	Condiment
	We use the web primarily because due to Alabama's wine distribution laws but, we would love to join a co-op.	Wine
Self-distributed	We distribute two days a week, on Tuesdays and Thursdays. Birmingham is two hours away so I wouldn't have any way of getting it there.	Condiment
	My son is our primary distributor and he makes around three trips a week to different shops around the state.	Wine
	Honey is expensive to ship due to the weight. I directly deliver the honey to small stores all over Mobile.	Honey
Mail Order	Our product is very seasonal and we receive orders from all over the country through our mail order catalogue.	Candy

Vendor Cooperatives

A suggestion that resonated many times from the producers was to form cooperatives with other similar Alabama producers. A cooperative could form and the members could take turns selling at the stall. One wine producer expressed that he was "trying to find other Alabama wine producers to join with his vineyard to lesson the costs of distribution. I think it would be great to sell at an Alabama Public Market if only I could partner with other wine makers." Some of the producers that were already a part of cooperatives expressed an interest in collectively leasing a stall. A Florence condiment producer stated that "we already take turns selling at our local farmers market and I don't see why we couldn't collectively sell at a Public Market as well."

Preferred Time to Sell

All food producers interviewed were asked to answer the question as to their most preferred months to sell during the year (see Table 3.3). The producers that answered spring and summer included mostly animal product producers. An Alabama beef producer expressed that "spring and summer time is our busiest time of year when everyone wants to be outside and grill out." The next season of interest was winter time which included the producers had a warm food offering. An Alabama coffee roaster said that "coffee is consumed all year but I think even people that are not coffee drinkers like to a warm cup when it's cold outside." Most of the breakfast food producers also expressed selling more products during the winter months.

The last category of preferred times of the year to sell included Christmas time. The wine producers and baked goods producers reported that Christmas time is when they sell the largest volume of product. "Our desserts are a southern tradition that sell primarily during the Christmas season" commented an Alabama baked goods producer. Each industry expressed interest in different times of the year when their product sells the best with one-third of the food producers having no particular months of increased sales.

When asked which days of the week the food product sells the best, the answer was always 'the weekend.' Most Alabama food producers observed that consumers purchased their products overwhelmingly on the weekends. A dried foods producer stated that, "most people still seem to do the bulk of their grocery shopping on the weekends. People have to work during the week and try to catch up their shopping on the weekends." The weekend is reported to be the time of the week when food products are purchased.

Table 3.3: Most Preferred Months to Sell During the Year, Alabama Food Producers 2006

Time Period	Comment	Product Classification
Spring/Summer	Spring and Summer time is our busiest time of year when everyone wants to be outside and grill out.	Animal products
	Summer is a big time of the year in the shrimp business.	Animal products
Winter	We have a primarily breakfast product that is consumed throughout the winter months.	Pre-packaged foods
	People seem to like to cook our product when it's cold outside.	Frozen foods
	Coffee is consumed all year but I think even people that are not coffee drinkers like a warm cup when it's cold outside.	Beverages
Christmas only	Our desserts are a southern tradition that sell primarily during the Christmas season.	Baked goods
	Lots of our customers buy wine as presents during the holidays. Producing enough for the holidays takes us all year.	Beverages

Customer Queries

Several questions concerning customer preferences were asked to each food producer interviewed. These queries included specific questions asked by their customers including: ‘Is this item organic,’ ‘What is the nutrition of the food product,’ ‘Cooking tips suggestions, ‘and ‘Where is this food product produced.’

The first question concerning the food product being organic had a common response (see Table 3.4). An Alabama coffee producer said “we rarely ever get the question whether our wine is organic.” A coffee roaster in Alabama replied that ‘there are still not enough organic customers to make it worthwhile for us to provide an organic blend of coffee.” Most of the respondents said that their customers did not inquire about their food products being organic.

Table 3.4: Customer Queries about Organic Production, Alabama Food Producers 2006

Organic	Comment	Product Classification
Is this item organic?	Our customers are more concerned whether the shrimp is 'Wild Caught.' If it's 'Wild Caught' they will support you.	Animal products
	We rarely ever get the question whether our wine is organic. It's almost impossible to grow muscadine grapes without using fertilizer.	Beverages
	No, there are still not enough organic customers to make it worthwhile for us to provide an organic blend of coffee.	Beverages
	No, our customers usually ask whether or not the cheese straws are organic, but it is an 'All Natural' product with no preservatives.	Pre-packaged foods

The customer inquiry question concerning the nutrition information of the product resulted in several different responses (see Table 3.5). Many of the producers said that their customers did not inquire about the nutrition of their food product. An Alabama barbeque sauce producer said that “No, most people that eat barbeque are not incredibly interested in nutrition facts.” Some producers however responded that their customers usually inquired about the nutrition of the food product. An Alabama beef producer said that “they are very concerned about the nutrition information. Our beef is very high in Vitamin E.” Most producers interviewed responded that the nutrition information is displayed on the product packaging in order to explain the nutrition information of the product.

Table 3.5: Customer Queries about Nutrition, Alabama Food Producers 2006

Nutrition	Comment	Product Classification
Do your customers inquire about the nutrition of your product?	They are very interested in the health benefits that our wine offers.	Beverages
	Yes, they can also see the nutrition facts on the label. Many are also concerned whether the relish is Kosher.	Condiments
	They are very concerned about the nutrition information. Our beef is very high in Vitamin E.	Animal products
	No, most people that eat barbeque are not incredibly interested in nutrition facts.	Condiments

Only few of the food producers interviewed felt that their customers wanted cooking tip suggestions. The producers that did occasionally get cooking questions responded that there is a recipe offered on the packaging of the product. Many others answered that there were recipes offered on their company's website for their product and that they referred their customers to the site often.

Most of the Alabama producers responded that their customers wanted to know where their product was produced (see Table 3.6). "Having an Alabama product is an important selling point for our products," responded an Alabama barbeque sauce producer. An Alabama shrimp producer stated that "Initially our customers are concerned about nutrition and taste until they find out it's Alabama 'Wild Caught' you have customers for life." Many also felt that having a product produced in Alabama as being an asset to their product sales.

Table 3.6: Customer Queries, about Product Origin, Alabama Food Producers 2006

Alabama	Comment	Product Classification
Do your customers inquire about where the product is made?	My customers are very interested in where my hives are located because of the health benefits of local honey.	Pre-packaged items
	Some of my customers are concerned with the location of my cattle. I always let them know that each of my animals has a unique I.D. that holds the animals test information.	Animal products
	Having an Alabama product is an important selling point for our products.	Condiments
	Initially our customers are concerned about nutrition and taste until they find out it's Alabama 'Wild Caught' you have customers for life.	Animal products
	No, our customers usually are not concerned where our product is made but we like to tell them.	Beverages

Producer Follow-up

Most of the producers wanted to make sure that they received information on the Alabama Public Market as soon as it was available about what was expected from a market vendor. Clearly vendor interest will be stimulated by a clear sense that other events and activities will bring a stream of potential customers to the Public Market.

Conclusion

The main objective of the vendor analysis was to measure the interest among Alabama producers in participating in the proposed Birmingham Public Market. Over 100 Alabama food product producers were contacted about their products and prospects for participation in the Public Market and extended interviews conducted with 45 vendors. The vendor list includes vendors producing a variety of Alabama products and included corporations and individual craft producers. The diversity of prospective vendors is one indication of the availability of the food product offerings in Alabama.

There are two different distinct categories of Alabama food producers. The largest category interviewed is small companies that are located in rural areas and have a very limited product offering and distribution capabilities. The other category included large corporate food producers that produce an assortment of food products for a particular food category and distribute their product throughout the United States. Some have some Alabama identity, but most are distributed on their merits on the product category but with little connection to Alabama agriculture or its growing conditions.

The positive response to recent Alabama food product marketing campaigns led many producers to believe that the Public Market could greatly increase the sales of their product. Increased visibility for their food items was another common advantage cited by producers. The range of products offered by the producers appears sufficient to supply a Public Market with the types of products needed.

Asked about their interest in selling at the Public Market, the most common response was that the producer was interested in selling at the Public Market conditioned by a variety of specific concerns or qualifications. One central finding is that producers were mainly interested as long as someone else sold the product for them. There was little expressed interest in actually renting and staffing an outlet store for their product. A suggestion that resonated many times from the producers was to form cooperatives with other similar Alabama producers. A cooperative could form and the members could take turns selling at the stall. The producers also wanted to be sure that if they signed a lease with the Public Market that there would be an assured customer interest in the market. The program of meetings and events at the meeting faculty on the site could be a significant source of customers for product vendors.

Most of the producers wanted to make sure that they received information on the Alabama Public Market as soon as it was available about what was expected from a market vendor. Clearly vendor interest will be stimulated by a clear sense that other events and activities will bring a stream of potential customers to the Public Market.

8 BUILDING AND SITE ANALYSIS

Objective

This chapter provides an architectural analysis of the neighborhood, adjacent properties, and the prospective site for the Public Market. The historic East Thomas community has a long railroad and industrial history, now dominated by a rail yard, food terminals, and the ALCIPO pipe mill. Results from a group discussion planning exercise called a charrette are summarized. We present potential elevations and floor layouts for a Public Market considering the expressed design and site preferences for the Public Market.

Surrounding Neighborhood

The property destined to become East Thomas, covering over 2000 acres, was purchased by Samuel Thomas, president of Thomas Iron Company in Eastern Pennsylvania, for four dollars an acre from Aldrich and DeBardeleben. He never felt obligated to develop the property in the Southern State until Birmingham was incorporated in 1871. After the revelation of Birmingham's abundance of raw materials, Thomas soon became an industrial center, having both coal and limestone on site. The first iron blast furnace, Republic Steel Coke Plant, opened in 1888; the second followed two years later (White, 1981: 128).

Village Creek provided water to cool the blast furnaces, and a reservoir was built in efforts to store water in case of a drought (Birmingham Historical Society, 1985: 5). This neighborhood was once a vibrant, flourishing home to the workers of the nearby blast furnaces and coke plants. The earliest foundation of the small town was located on the former Hawkins' plantation. Thomas was designed to model Hokendauqua, Pennsylvania, home to the Thomas Iron Company.

Thomas is located within Jones Valley, part of the southwestern fringe of the Appalachian Mountain Range. "The initial attraction of Jones Valley, a two-to-three mile wide valley between Red Mountain and the ridges and hills of the Cumberland Plateau, was the alluvial soil four major creeks had deposited along their meandering courses" (Birmingham Historical Society, 1985: 3).

The topography of East Thomas is relatively flat, with slopes varying from 1-4 percent. Drainage on site runs south and southwest. Village Creek, the main storm-water drainage channel for Jones Valley, is located north of Interstate 59/20, just below the East Thomas rail yards, forming the southern boundary for East Thomas. Due to the slight fall of the creek, Village Creek, a perennial stream, often presents the area with heavy flooding "because of inadequate drainage facilities and topographical characteristics" (North Birmingham Neighborhood Analysis 1967).

Village Creek is a tributary formed off the Black Warrior River, and it drains over one hundred square miles inside Jones Valley. “It’s forty mile course begins by flowing toward the southwest though Jones Valley, continuing through a gap in Flint Ridge, enters Opossum Valley, and then travels toward the northwest to its junction with the Locust Fork of the Black Warrior River” (Birmingham Historical Society, 1985: 2). Village Creek is powered by the run-off and limestone-formed springs in the Valley. John Milner, the original surveyor of Birmingham, envisioned Village Creek as the main source of drinking water for the “Magic City” (Birmingham Historical Society, 1985: 3).

Today Thomas is bordered by Village Creek to the south, Arkadelphia Road to the west, Birmingham Southern Railroad to the north, and Interstate 65 to the east (White, 1981 131-2). The Birmingham Southern Railroad, currently owned by Transtar Corporation, serves the largest steel manufacturers in the south. The former site of the Pioneer-Republic Blast Furnaces and Coke Plant, open from 1888-1971, is now home to the Wade Sand and Gravel Company, located just west of Arkadelphia Road (White, 1981 131-2).

East Thomas is controlled by rails, freight, and wholesale warehouses. Railroads account for 20 percent of the existing development, while wholesale dealers make up about 19 percent of the area. Thirteen percent of East Thomas is designated for residential development, most in the east and a small portion in the center. Transportation takes up 10 percent of the area, and the rest of East Thomas is designated for manufacturing (North Birmingham Neighborhood Analysis, 1967). Due to the heavy industrial character of this area, the new market should offer an extensive range of uses to encourage a wide array of visitors to travel to this area. Cooking lessons, food or art festivals, or concerts are good examples or activities that could occur simultaneously with the public/farmers market activities.

Charrette Results

A charrette, an intense, collaborative design effort, was held in Birmingham on February 24, 2006 to compile a list of goals for the proposed Public Market. This design charrette[4] successfully established direction for the development of a Public Market Birmingham. The charrette allowed stakeholders to identify market goals and establish priorities. The City of Birmingham Planning Director and his staff participated in the charrette and provided the city’s perspective on land use and space allocation. The Executive Director of the Alabama Farmers Market Authority also participated and provided a state-level view of marketing opportunities for farmers. Also present were representatives from city, state, and federal government entities who endorse this

[4] The term “charrette” evolved from a pre-1900 exercise at the Ecole des Beaux Arts in France. Architectural students were given a design problem to solve within an allotted time. When that time was up, the students would rush their drawings from the studio to the Ecole in a cart called a charrette. Students often jumped in the cart to finish drawings on the way. The term evolved to refer to the intense design exercise itself. Today it refers to a creative process akin to visual brainstorming that is used by design professionals to develop solutions to a design problem within a limited timeframe.

project. Associate Deputy Administrator of USDA, AMS, Errol Bragg and Fidel Delgado an Architect also with USDA, AMS attended the planning session.

The charrette agenda helped participants to make informed decisions. The session started with a general introduction of persons participating and was followed by a tour of the market. Case studies were presented of farmers markets and public markets from various locations in the US and allowed the participants to visualize possibilities. A general discussion followed with an interchange of ideas which clarified questions and concerns. The afternoon session began with expressions of visions of the market redevelopment and development of the Public Market.

Vision

A destination market
Established identity
High quality products
People friendly
Customer focused
Excitement/Atmosphere/Positive Customer Experience
Increased business
Increased income
Increased tax base
Jobs creation

Also expressed by those present were specific goals prioritized by importance.

Goals

Multi-market farmer/public/wholesale
Facility facelift
Visible access/defined entry
Property acquisition on Finley Ave
Convenient parking
Upgrade existing warehouses and dock enclosures
Pedestrian friendly
Way finding/signage
Improved lighting
Updated restrooms
Grounds landscaping
Flea market upgrades

Design Preferences

For the design portion of the charrette the participants were divided into three groups. Each group was lead by an architect and included a board member and other attendees.

Three site development schemes were created and presented. Each scheme proposed solutions for market redevelopment and expansion. USDA, Agricultural Marketing Service Branch (USDA, AMS) architect summarized the presentations and identified common elements of each proposal. The following points were made at the conclusion of the design charrette:

1. The site needs two clearly defined entries from Finley Boulevard
    a. Alter existing rights-of-way
    b. Restructure Blocks 1, 2 and 3
2. Additional property for the market should be acquired.
3. A Public Market will be part of the expanded market.
4. Additional warehouse lease space is needed to increase cash flow.
5. Enclosed docks must comply with HACCP requirements.
6. Replace Sheds 4 and 5.
7. Restrooms should be replaced.
8. Market sheds should be improved.
9. Flea market structure will need further assessment

Figures 8.3 and 8.4 present the design from the charrette, which served as the starting point for the proposed potential facility layout options presented in Figures 8.5 and 8.6.

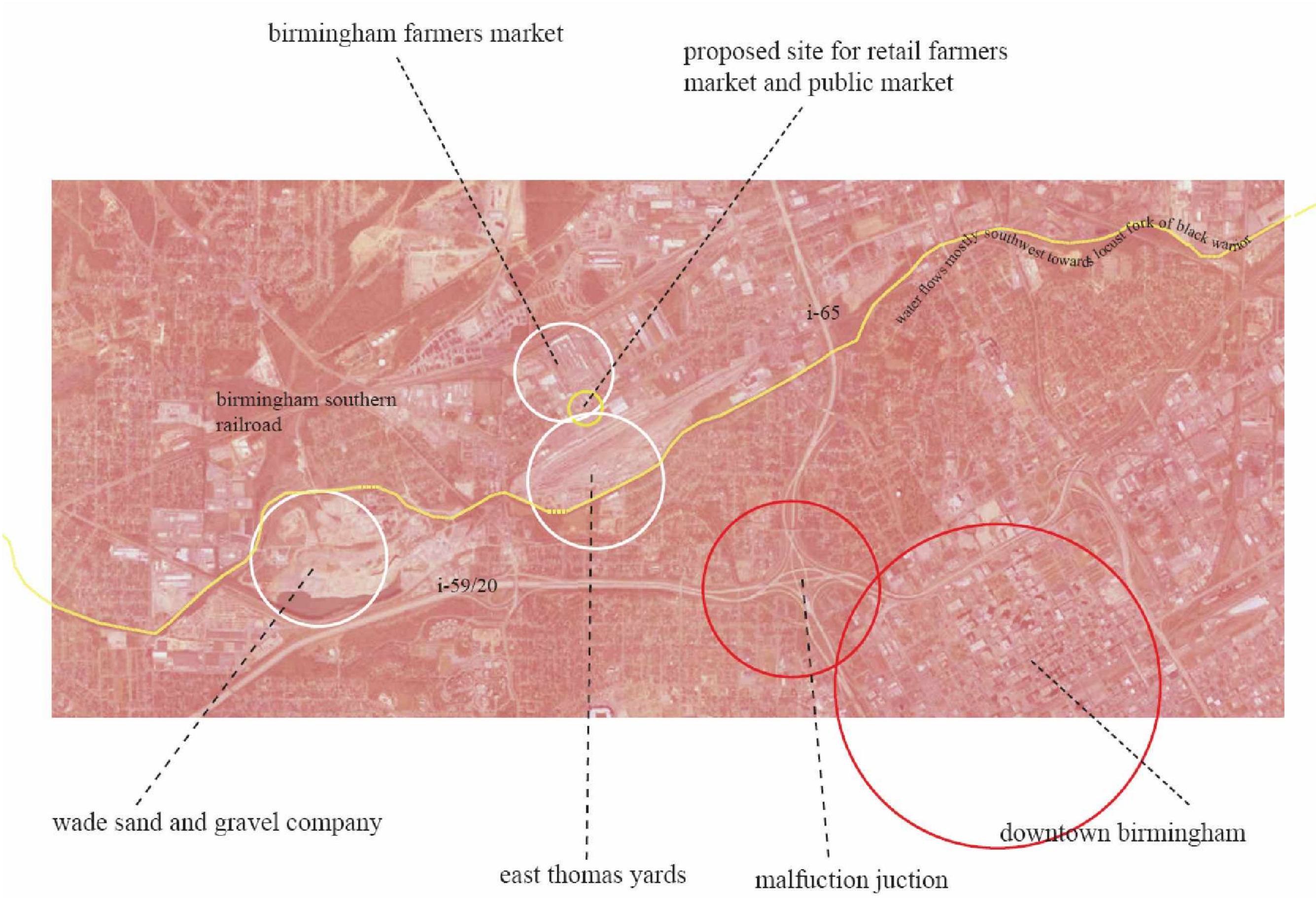

Figure 8-1. Aerial Map of the Study Area

Figure 8-2. Birmingham Farmers' Market: Existing Condition

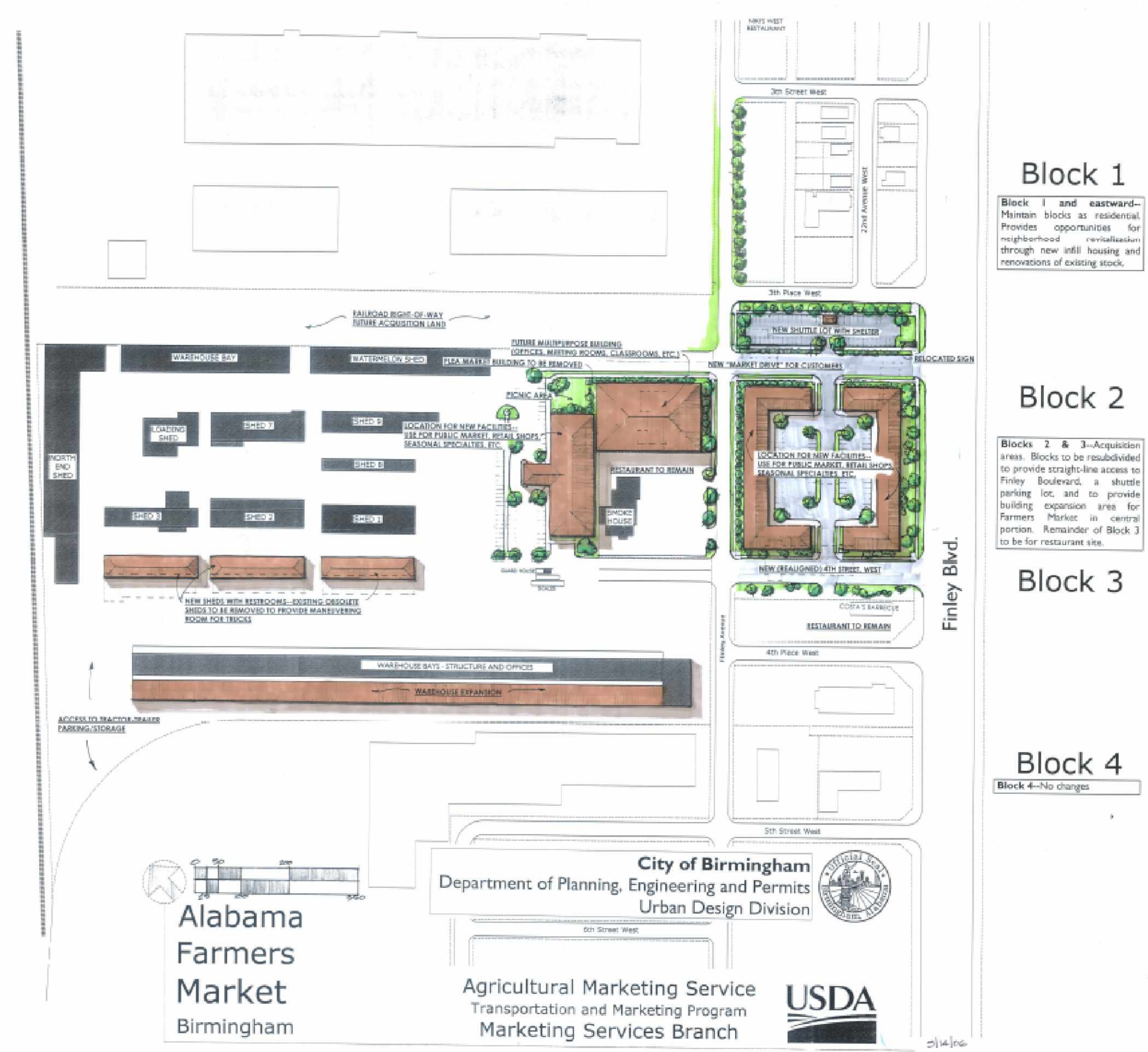

Figure 8-3. Market Place Charrette

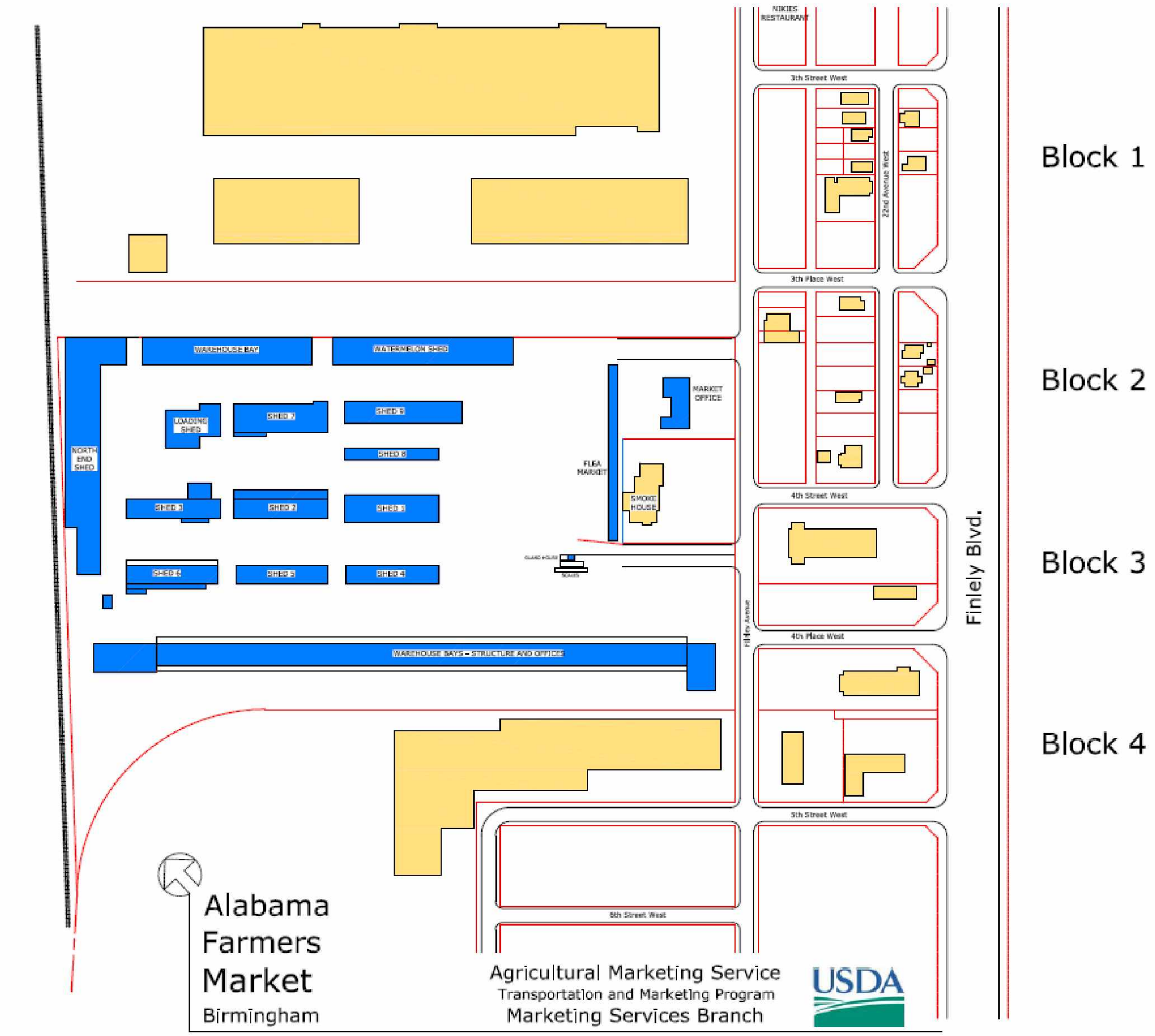

Figure 8-4. Birmingham Farmers' Market Parcels

Potential Facility Layout Options

Proposal A features a roof garden and trails that serve as pedestrian pathways to connect the new market to the existing market (Figure 8-5). This building would be constructed on the lot located south of the BFM.

The pedestrian pathways would allow for a stronger connection between the two markets and encourage people to move back and forth between the two more readily. The garden would carry the visitor on top of the roof where one could eat lunch or watch the other market users.

The paths also connect to a park located in the parking lot of the existing BFM. These attributes would be beneficial in drawing people to the area. There must be multiple uses to engage as many people as possible.

The facade that faces Finley Boulevard would hold several of the stalls for the Public Market, while the rest would be located inside the facility.

The inside would feature more stalls for the Public Market as well as space for the retail farmers market. The inside would also feature kitchens for cooking lessons, dining space, meeting rooms, and storage.

Parking would be located on either side of the new building. This proposal also features two new roads to allow for better access to both markets.

Proposal B divides the retail farmers market from the Public Market. The Public Market, featuring local goods, would face Finley Boulevard, a major thoroughfare for the area, and could serve as great advertising for the market (Figure 8-6). These buildings would be placed on the lots south and southeast of the existing Farmers Market.

Each building is C-shaped and features modular cubes, which can be opened up to accommodate different types of vendors. This allows easy access for trucks to drop off goods.

The four larger rooms can be used for the showcase kitchens where people can gather to take cooking lessons, storage, or various other uses.

The central space would be a great place for people to have lunch, enjoy their purchases from the market, or local bands could use the space for festivals.

Parking would be located on the perimeter of the buildings. The north side of the building would remain open for truck access, and there would be a crosswalk at point A.

Figure 8-5. Facility Layout: Proposal A

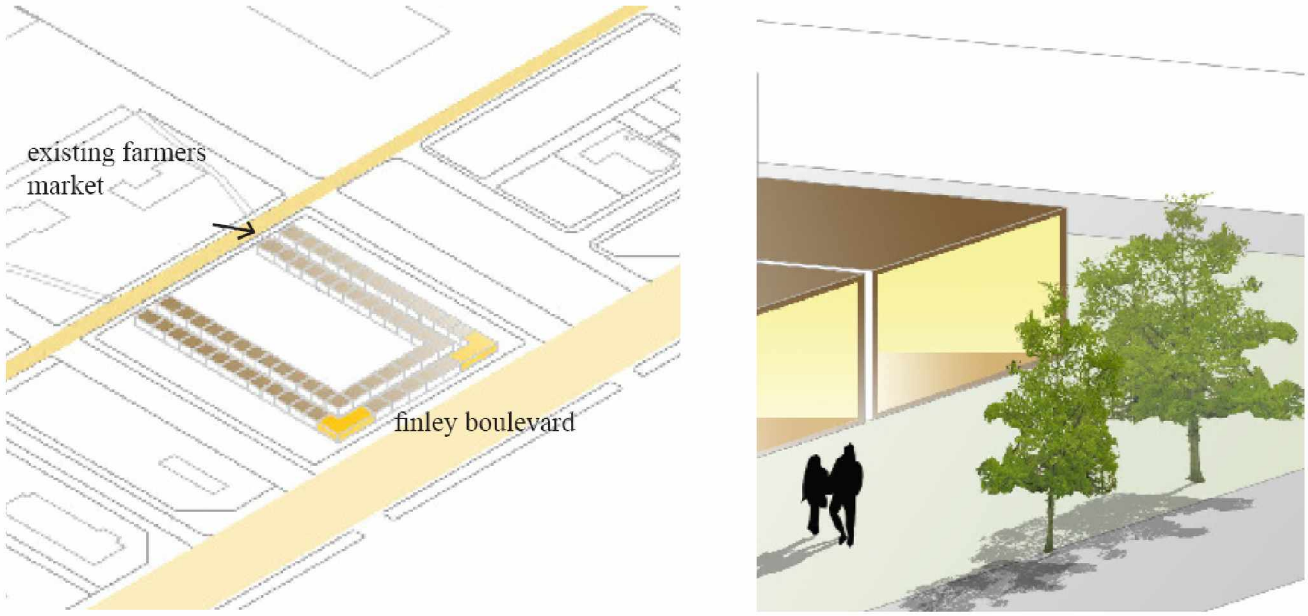

Figure 8-6. Facility Layout: Proposal B

Conclusion

An architectural site analysis of the prospective Public Market considers the surrounding area and land uses and presents some design scenarios based on the preferences and vision expressed in a design charrette held in 2006. The main conclusions were that the site needs two clearly defined entries from Finley Boulevard, and that existing rights-of-way should be altered by restructure adjacent city blocks and acquiring additional property and other aspects may be reorganized in consideration of a broader set of improvements to the Birmingham Farmers Market.

9 DEVELOPMENT CONCEPT AND FINANCIAL FEASIBILITY

Objectives

The main objectives of this section are to (a) determine the cost of acquisition of the property and land needed and (b) present the architectural engineering cost estimates for demolition of existing structures, land preparation, and building construction. The cost analysis is based on standard architectural practices.

The Public Market development process will require important modifications of the areas across from the current Birmingham Farmers Market, including Finley Street and part of 4^{th} Street, to create a single entry into the expanded market complex. There are four key cost items involved: (1) asset acquisition; (2) site preparation; (3) site development, including new roadways, utilities, lighting, and parking; and (4) building construction.

Property acquisition was determined by assessing the cost of necessary parcels. We used twice the assessed valuation as a measure of the market value of the properties. These costs are tempered by City of Birmingham property acquisition procedures that can be used to implement the project.

Site preparation was estimated by summing demolition and clearing costs for the necessary real estate parcels (RS Means, 2007). This includes demolition costs, site clearing, and basic utility service that are incurred before the start of actual building construction.

Site development costs were estimated using estimates available from commercial sources that are updated monthly. Thus, these figures reflect commercial reality.

Building construction costs were estimated from commercial sources of information for these outlays. We employed online contractor resources and a materials price database using specialized software to develop these numbers.

The analysis considers three scenarios based on the amount of subsidy received through government grants or low interest loans and the level of cost recovery that might be expected from Public Market tenants.

Property Acquisition

The acquisition of the buildings and land will require the full cooperation of the City of Birmingham.[5] The involvement of the city will ensure that laws and city ordinances that are applicable to such process are followed.

Table 9-1: Properties to be Acquired and their Costs, Birmingham Public Market, 2007

Parcel Number	Cost in Dollars
12	324,700
6	67,500
4	51,000
14	50,900
16	40,000
7	39,000
5	29,000
19	28,000
10	26,500
17	25,000
3	7,000
15	6,600
8	5,700
9	5,500
11	5,500
13	5,500
18	4,600
Total Acquisition Cost	**722,000**
Total Tax-Assessed Value 722,000 x 2	**$1,444,000**
Total Land Area 187,514.55 ft.^{2}	**4.252 Acres**

[5] Cost is estimated at 50% of market value of buildings and land, and the tax-assessed value is twice the market value.

Site Preparation

Since there are structures on the site, it will be necessary to demolish them and prepare the area for the new facility. The target location involves several single-family houses, a commercial building, and some reworking of streets and access drives.

The costs of demolition and hauling of the refuse are given in **Table 9-2** below.

Table 9-2: Site Preparation Cost, Birmingham Public Market, 2007

Site Preparation Item	Cost in Dollars
Asphalt installation @$1.80/ ft^2 x 189,430 ft^2	330,774
Remove concrete base, 6-inch thick@$5.05 per $ft.^2$	61,130
Demolition 8 single-family, 1 story houses $4,775 each	38,200
Asphalt hauling: 79 containers x 7 tons/container@$63/ton	34,839
Demolition metal steel bldg., concrete base steel rigid frame 12,105 ft^2 (145,260 ft^3)	30,504
Hauling refuse: 7-9 tons per container x 4 containers x 8 buildings @$63/ton	14,112
Asphalt removal: alley, street, bread bldg., & 4th street (total 3,162 ft^3) @$1.80	5,691
New 4^{th} street curb and gutters $6.70/lf x 760 lf	5,092
Total	**$520,342**

Source: R.S. Means, 2007

Exterior Site Development

Table 9-3: Costs of Exterior Site Development and Building Construction, Birmingham Public Market, 2007

A. Exterior Site Development	Cost in Dollars
Asphalt pavement 110,000 ft.^{2}	68,200
Hard Surface 15,000 ft.^{2}.	47,550
Site Lighting	30,000
Signage	30,000
Concrete curbs: straight 4,000 LF	28,800
Gravel Base 15,000 ft.^{2}	18,450
Radius 500 LF	5,075
Pavement markings 6,144 LF	2,335
Landscaping: 43,000 ft.^{2}	
Trees 40 ft.^{2}	23,800
Base 30,000 ft.^{2}	11,636
Shrubs: 220 ft.^{2}	11,000
Ground cover 10,000 ft.^{2}	8,800
Plants	6,560
Sod 20,000 ft^2.	6,400
Plants	4,015
Preparation labor	1,734
Contingency 10%	30,436
Total Exterior Improvements	**334,791**
B. Building Construction:	
22,412 ft^2 @$87.44 per ft.^{2}	1,959,691
Contingency 10%	195,969
Total Building Construction	**2,155,660**
C. Service and Testing Fees	
Professional design fees 7%X$2,155,660	150,896
Demolition Specs and administration	10,406
Site survey	8,500
Soil and construction material tests	7,500
Total Services and Testing Fees	$177,302
GRAND TOTAL [Tables 9(.1 +. 2 + .3)]	**$4,632,095**

Construction of the Public Market

The 22,412 ft^2 Public Market Building will sit on 195,418 ft^2 lots adjacent to the current BFM. Currently the area comprises of buildings and vacant lots to be acquired. The construction cost is estimated at $2,155,660, bringing the total cost of the project to four million, six hundred thirty-two thousand, and ninety-five dollars (**$4,632,095**)

The Birmingham Public Market will be a steel building occupying the area covering Finley Street, part of 4th Street, and land under the property adjacent to the current Farmers Market. A new 4th Street will be constructed, and a roadway will be built to give a single entrance to the entire Birmingham Market Complex from the new 4th Street. The Public Market building will contain 24 units of at least 100 square feet each for year-round renting to venders.

The area between the Public Market building and the current Farmers Market will be the seasonal produce retail sellers market that will have 40 stalls, each 12' x 16', with a 15' aisle. These added market facilities will greatly supplement, and attract venders and buyers to, the Birmingham Farmers Market; thereby providing an outlet for selling and buying Alabama beverages and other products. As such, it will serve important social purposes not only for the City of Birmingham, but also as a tourist attraction for the State of Alabama.

Financial Scenarios

The main purpose of this section is to assess the cost and the potential for profitability, as well as contribution to community service and city revitalization initiatives, of the project. Three funding scenarios are analyzed, and the income statement for each is presented to serve as a decision variable. In the revenue analysis, it is assumed that 80% of the inside units will be occupied year round, given effective rental policies and promotion; 90% of the outside stalls will be occupied during harvest; and harvest will last for about 5 months (42%) of the year. The basic assumptions regarding occupancy rates, duration of harvest, and income reporting period are the same through out. This allows for comparison of the results of the different scenarios.

Many of the detailed decisions regarding rental policies and the actual running of the Public Market Complex as a business will be made once the augmentation has been completed. However, to determine the financial feasibility of the project, a limited number of possibilities are presented below to guide the decision-makers. It should be mentioned, in passing, that it is possible to develop any number of decision options, but the ones presented here are much simpler and straight forward.

Three Scenarios are considered. One involves a loan and government grants.
A second a larger payment by the Birmingham Farmers Market for construction costs.

A third assumes that the total cost of the project should be paid with grants.

Each of the following sections presents a table that summarizes the quarterly and annual costs of loan repayment, operating costs, and net revenue to the Birmingham Farmers Market under each Public Market financing strategy.

Scenario I: The Jefferson County Truck Growers Association should pay the construction cost with a ten years loan and the rest of the cost is paid with grants. In this scenario, the Jefferson County Truck Growers will claim annual depreciation on the building and equipment. The process here is to establish the minimum monthly charges for an inside unit and for a stall that will allow the growers to break-even.

Table 9-4: Quarterly and Yearly Income Statement for Scenario I

Quarterly and Yearly Revenue and Cost Plan With Loan	Dollar Amount	
	Quarterly	Yearly Total
A. REVENUE		
Inside Units Rental Income (30 stalls@$1630/Month) x .80 occupation rate x3 months	117,360	469,440
Outside Stalls Rental Income (40 units x .90 occupation rate during harvest x $800/Month) x .42 of the year	36,288	145,152
Total Revenue TR	**153,648**	**614,592**
B. COSTS		
Staff Costs [($10,000 x 3) x 1.25]/4	9,375	37,500
Operation Costs ($2/ft^2./year x 22412 ft^2. Utilities)/4	11,206	44,824
Miscellaneous Costs	1,500	6,000
Loan Installment (on $2,155,660 loan for 10 years at 7.8%)	77,781	311,124
Depreciation (10%/year on $2,155,660 building)	53,819	215,276
Total Cost TC	**153,681**	**614,724**
C. GROSS PROFIT = TR-TC	**($33)**	**($132)**

The rental rates determined in Table 9-4 above will lead to an annual break-even, all other things being constant (the small loss is due to rounding rents to whole numbers). The break-even rate is the lowest price above which profit-making is possible. Given that the total cost will be pretty much constant at $153,681, there are linear combinations of monthly rental rates for inside units and outside stalls that can create a break-even situation, and those are defined by the equation:

$72R_{insideunit} + 45.36R_{outsidestall} = 153{,}681$ **Equation (1)**

Setting one of these rates, the second rate can be determined by simple arithmetic calculations. Setting the rate for an inside unit or both inside unit and outside stall lower than the calculated values will yield loss for the growers. The break-even prices in this scenario are far above fair market rates; therefore, this option is noncompetitive and infeasible under current market conditions.

Scenario II: The Jefferson County Truck Growers Association pays the construction cost with a ten years loan and charge cost plus 20%, and the rest of the cost is paid with grants. In this cost-plus-20% calculation, the profit margin determines the monthly rental rates in **Table 9-5** below.

Table 9-5: Quarterly and Yearly Income Statement for Scenario II

Quarterly and Yearly Revenue and Cost Plan With Loan	Dollar Amount	
A. REVENUE	Quarterly	Yearly Total
Inside Units Rental Income (30 stalls x $1,932/Month) x .8 occupation yearly	139,104	556,416
Outside Stalls Rental Income (40 units x .90 occupation rate during harvest @$1000/Month) x .42 of yearX3months.	45,360	181,440
Total Revenue TR	**184,464**	**737,856**
B. COSTS		
Staff Costs [($10,000 x 3) x 1.25]/4	9,375	37,500
Operation Costs ($2/ft^2./year x 22,412 ft^2. Utilities)/4	11,206	44,824
Miscellaneous Costs	1,500	6,000
Loan Installment (on $2,155,660 loan for 10 years at 7.8%)	77,781	311,124
Depreciation (10%/year on a $2,155,660 building)	53,819	215,276
Total Cost TC	**153,681**	**614,724**
C. GROSS PROFIT = TR-TC	**$30,783**	**$123,132**

As can be seen, this scenario leads to a modest gross profit of $123,132 annually at the rental rates of $1,932 per month for inside unit and $1,000 per month for outside stall. Again, these rental rates are unacceptably high based on nationwide estimates.

Scenario III: The total cost of the project should be paid with grants.

Like Scenario One above, this scenario calls for the determination of break-even rental rates for the inside units and the outside stalls. Since the cost of the facility will be paid from grants, the growers will not claim the annual depreciation, but they will pay income tax on the resulting higher profits. This will compensate for the financing of the project with grants from government and other sources.

Table 9-6: Quarterly and Yearly Income Statement for Scenario III

	Dollar Amount	
Quarterly and Yearly Revenue and Cost Plan Without Loan	Quarterly	Yearly Total
A. REVENUE		
Inside Units Rental Income (30 units@$220/Month) x .8 occupation rate (3 months)	15,840	63,360
Outside Stalls Rental Income (40 units x .90 occupation rate during harvest@$138/Month) x .42 of the year	6,260	25,040
Total Revenue TR	**22,100**	**88,400**
B. COSTS		
Staff Costs [($10,000 x 3) x 1.25]/4	9,375	37,500
Operation Costs ($2/ft^2./year x 22,412 ft^2. Utilities)/4	11,206	44,824
Miscellaneous Costs	1,500	6,000
Total Cost TC	**22,081**	**88,324**
C. GROSS PROFIT = TR-TC	**$19**	**$76**

Under this scenario, the break-even rates will be $220 per month for inside unit and $138 for outside stall (the negligible profit is due to rounding the rents to whole numbers). The total operation cost being $22,081, without the claim of depreciation, the exact break-even levels of rental rates can be determined using **Equation (2)** below.

$72R_{insideunit} + 45.36R_{outsidestall} = 22{,}081$ **Equation (2)**

The break-even rental rates are within the normal range of break-even rates nationwide. Setting the actual rental rates within the competitive ranges of $300-$350 per month for inside unit and $175-$200 per month for a stall will yield profits. Obviously this is the most profitable scenario for the growers and the renting venders since the rental rates will be lower for venders while profits remain attractive for the growers association.

Financial Feasibility of the Public Market

The augmentation of the Birmingham Farmers Market to have both Public Market and Seasonal Retailers Market is a plausible project, financially and from a city revitalization perspective. However, it will require joint funding and the collaboration of the City of Birmingham, Jefferson County Truck Growers Association, Alabama Farmers Market Authority, and any other entity that might be willing to contribute to the objectives of the project. The project definitely will need substantial, if not total, funding from external sources. Such funding will improve opportunity for increased benefits to both the Jefferson County Truck Growers Association, the venders who will sell in the facility, and shoppers.

The City of Birmingham has a big stake in the tax revenue potential in the Primary and Secondary Trade Areas. The conservative estimate of potential annual tax revenue presented in Table D-4 on page 57 of this report is $966,558 for the Primary Trade Area. A similar estimate for the Secondary Trade Area is $140,000 in Table D-6 on page 58. These figures, coupled with the substantial profit potentials for the Jefferson County Truck Growers Association in providing outlet for Alabama products, serve as reasons for consideration of funding the augmentation project.

Conclusion

The main objectives of this section are to (a) determine the cost of acquisition of the property and land needed and (b) present the architectural engineering cost estimates for demolition of existing structures, land preparation, and building construction. The cost analysis is based on standard architectural practices.

The Public Market development process will require important modifications of the areas across from the current Birmingham Farmers Market, including Finley Street and part of 4th Street, to create a single entry into the expanded market complex. There are four key cost items involved: (1) asset acquisition; (2) site preparation; (3) site development, including new roadways, utilities, lighting, and parking; and (4) building construction.

Property acquisition was determined by assessing the cost of necessary parcels. We used twice the assessed valuation as a measure of the market value of the properties. These costs are tempered by City of Birmingham property acquisition procedures that can be used to implement the project.

Site preparation was estimated by summing demolition and clearing costs for the necessary real estate parcels (RS Means, 2007). This includes demolition costs, site clearing, and basic utility service that are incurred before the start of actual building construction.

Site development costs were estimated using estimates available from commercial sources that are updated monthly. Thus, these figures reflect commercial reality.

Building construction costs were estimated from commercial sources of information for these outlays. We employed online contractor resources and a materials price database using specialized software to develop these numbers.

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APPENDIX A: ADVISORY COMMITTEE MEMBERS

Birmingham Farmers' Market

Maurice Bothwell, Manager

Jefferson County Truck Growers Board of Directors

Lawrence Calvert, President

Wade Whited, Treasurer

Tim Bagwell

Victor Buchanan

Leonard Crocker

Clarence Dixon, Vice President

Danny Jones

Scott Penton

Claude Richards

Alabama Farmers Market Authority

Don Wambles, Director

Skip Sullivan

John Willoughby

USDA Agricultural Marketing Service

Fidel Delgado

APPENDIX B: DEMOGRAPHIC CHARACTERISTICS OF THE MARKET AREA POPULATION

Table B-1: Population Distribution

	Primary Area (a)	Secondary Area (b)	Birmingham-Hoover MSA	County	State
1990 Census	194,029	445,722	956,840	651,522	4,040,590
2000 Census	173,054	427,114	1,052,238	662,047	4,447,100
2005 Census	169,050	424,518	1,083,072	656,768	4,530,643
2010 Projection	170,603	430,635	1,115,848	651,093	4,618,967
Growth Rates					
1990-2000	-11.5%	-4.5%	10%	1.61%	10.06%
2000-2005	-2.3%	-0.61%	2.93%	-0.8%	1.9%
2005-2010	0.9%	1.4%	3.03%	-0.86%	2.0%

(a) Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b) Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.

Data Sources: ESRI Business Analyst on Line, U.S. Bureau of the Census: State and County Quick Facts, and Population Estimates, 2000 Census of Population and Housing.

Table B-2: Race and Gender Distribution, 2005

	Primary Area (a)		Secondary Area (b)		Birmingham-Hoover MSA		Jefferson County		State	
	number	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*
White	35,838	21.2%	192,731	45.4%	770,064	71.1%	390,120	59.4%	3,216,756	71.0%
Black	127,802	75.6%	218,627	51.5%	279,432	25.8%	246,288	37.5%	1,155,314	25.5%
Other	862,155	3.2%	20,801	3.1%	56,320	3.1%	20,360	3.1%	167,634	3.5%
Males	78,946	46.7%	198,250	46.7%	535,038	49.4%	318,532	48.5%	2,251,730	49.7%
Females	90,104	53.3%	226,268	53.3%	548,034	50.6%	338,235	51.5%	2,278,913	50.3%

(a) Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b) Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.

Data Sources: ESRI Business Analyst on Line, U.S. Bureau of the Census: State and County Quick Facts, and Population Estimates, 2000 Census of Population and Housing: Summary File 1.

Table B-3: Age Distribution, 2005

	Primary Area (a)		Secondary Area (b)		Birmingham-Hoover MSA		Jefferson County		Alabama	
	number	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*
0-5 years*	11,157	6.6%	27,169	6.4%	88,812	8.2%	51,885	7.9%	366,982	8.1%
6-11 years*	10,481	6.2%	26,320	6.2%	87,729	8.1%	51,885	7.9%	371,513	8.2%
12-17 years*	11,495	6.8%	29,292	6.9%	94,227	8.7%	57,139	8.7%	398,697	8.8%
18-24 years*	26,541	15.7%	60,706	14.3%	105,058	9.7%	66,990	10.2%	475,718	10.5%
25-34 years	26,034	15.4%	59,008	13.9%	147,298	13.6%	88,007	13.4%	579,922	12.8%
35-44 years	22,822	13.5%	57,734	13.6%	159,212	14.8%	95,888	14.6%	647,882	14.3%
45-54 years	24,512	14.5%	62,829	14.9%	161,378	14.9%	97,202	14.8%	647,882	14.3%
55-64 years	15,045	8.9%	41,178	9.7%	108,307	10.0%	62,393	9.5%	475,718	10.5%
65-74 years	9,974	5.9%	27,594	6.5%	68,234	6.3%	42,690	6.5%	299,022	6.6%
75-84 years	7,776	4.6%	23,348	5.5%	45,489	4.2%	30,868	4.7%	194,818	4.3%
85 years and over	3,212	1.8%	9,339	2.2%	17,329	1.6%	11,822	1.8%	72,490	1.6%
Total Population	169,050		424,518		1,083,072		656,768		4,530,643	
Median Age	34.5		36.8		36.2		36.3		36.1	

***** For the primary and secondary areas, the age brackets range from: 0-4 years, 5-9 years, 10-14 years and 15-24 years
(a)Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b)Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.

Data Sources: ESRI Business Analyst on Line, U.S. Bureau of the Census: State and County Quick Facts, Population Estimates, 2000 Census of Population and Housing: Summary File 1.

Table B-4: Household Income Distribution, 2000, 2005 and 2010 Projection

	Primary Area (a)		Secondary Area(b)		City of Birmingham		County		State		U.S.A	
Income Bracket (2000)	*number*	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*
Less than $15,000	22,061	33.0%	39,399	23.4%	29,404	29.8%	52,663	20.0%	391,406	22.5%	16,724,255	15.9%
15,000 - $24,999	12,021	18.0%	25,236	15.0%	17,047	17.2%	37,213	14.1%	257,393	14.8%	13,536,965	12.8%
$25,000 - $34,999	9,786	14.7%	22,674	13.5%	14,679	14.9%	35,358	13.4%	236,732	13.6%	13,519,242	12.8%
$35,000 - $49,999	9,736	14.7%	26,315	15.6%	15,339	15.5%	42,426	16.1%	286,612	16.5%	17,446,272	16.5%
$50,000 - $74,999	7,693	11.5%	26,056	15.5%	13,022	13.2%	46,211	17.6%	298,347	17.2%	20,540,604	19.5%
$75,000 - $99,999	2,817	4.2%	12,265	7.3%	4,796	4.9%	22,748	8.6%	134,135	7.7%	10,799,245	10.2%
$100,000 - $149,999	1,675	2.5%	8,994	5.3%	2,831	2.9%	15,838	6.0%	85,987	5.0%	8,147,826	7.7%
$150,000 - $249,999	723	1.1%	4,949	2.9%	1,181	1.2%	7,582	2.9%	34,713	2.0%	3,469,119	3.3%
$250,000 - $499,999	225	0.3%	1,740	1.0%	361	0.4%	2,233	0.8%	9,110	0.5%	934,774	0.9%
$500,000 or more	59	0.1%	884	0.5%	88	0.1%	983	0.4%	2,950	0.2%	420,820	0.4%
Total HH Income 2000	$86,795		$183,343		$98,748		$263,255		$1,737,385		$105,539,122	
Median HH Income 2000	$25,300		$33,966		$26,735		$36,868		$34,135		$41,994	
Per capita Income 2000	$16,103		$21,133		$15,663		$20,892		$18,189		$21,587	
Median HH Income 2005	$27,838		$38,031				$39,802		**$36,131**		**$44,389**	
Per capita Income 2005	$18,003		$24,488				$22,458		$29,136		$34,586	
Median HH Income 2010	$31,257		$42,845									
Per capita Income 2010	$21,027		$29,222									

(a)Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b)Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.
Data Sources: ESRI Business Analyst on Line, U.S. Bureau of the Census: State and County Quick Facts; Census 2000 Summary File 3.

Figure 3. Primary Area (a) Households by Income, 2005

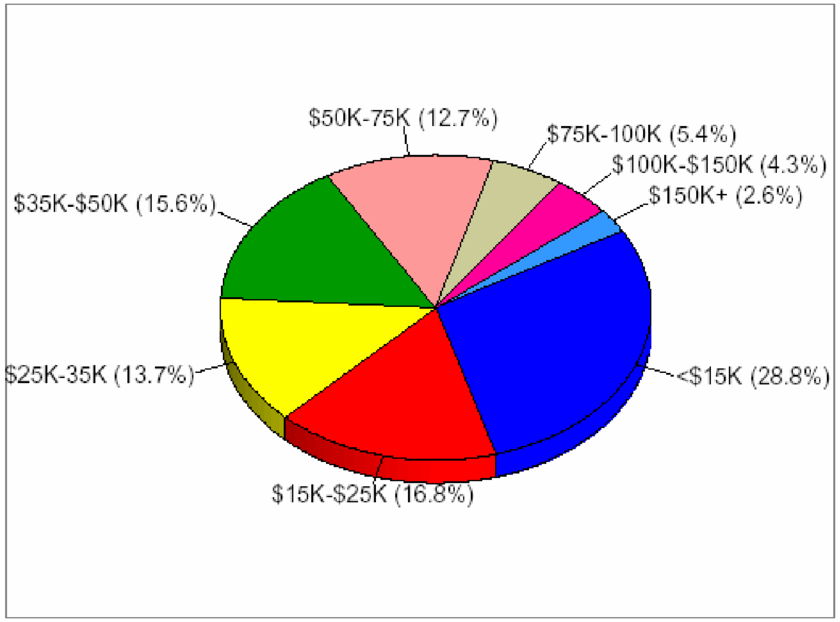
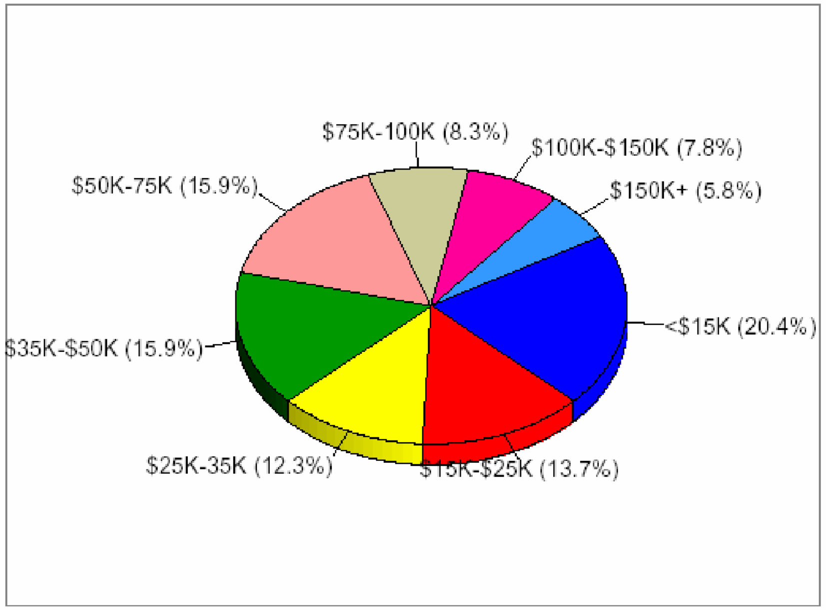


Figure 4. Secondary Area (b) Households by Income, 2005



(a) Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b) Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.

Data Source: ESRI Business Analyst on Line.

Table B-5: Household Characteristics

	Primary Area (a)		Secondary Area (b)		Birmingham-Hoover MSA		Alabama	
	number	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*
Household Structure (2000)								
Married-couple family	27,868	32.1%	76,320	41.6%	30,705	31.1%	906,916	52.2%
With own children under 18 years	11,579	13.3%	33,049	18.3%	12,395	12.5%	391,185	22.5%
Householder living alone	22,825	26.3%	40,492	22.1%	33,950	34.4%	453,898	26.1%
Household Type (2005)								
Total households	71,311		175,417		472,530		2,031,397	
Family households	39,986	56.1%	108,634	61.9%				
Non-family households	31,326	43.9%	66,783	38.1%				
Average household size	2.28		2.35					
Housing Tenure (2005)								
Occupied units	71,304	86.4%	175,494	89.8%	433,782	91.8%	1,826,225	89.9%
Owner-occupied housing units	35,487	43.0%	111,785	57.2%				
Renter-occupied housing units	35,817	43.4%	63,710	32.6%				
Housing units (2010 projection)	84,473		201,123					
Median age householder	35.8		38.1		48.5		49	

(a) Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b) Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.

Data Sources: ESRI Business Analyst on Line, U.S. Bureau of the Census: State and County Quick Facts, Population Estimates, 2000 Census of Population and Housing: Summary File 1.

Table B-6: Educational Attainment, 2000

	Primary Area (a)		Secondary Area (b)		Jefferson County		Alabama	
Education Level	*number*	*percent*	*number*	*percent*	*number*	*percent*	*number*	*percent*
Less than High School	38,010	25%	55,010	18%	82950	19%	714,081	25%
High school graduate (includes equivalency)	42,916	27.7	75,088	24%	121233	28%	877216	30.4
Some college, no degree	36,507	23.6	68,193	22%	98542	23%	591055	20.5
Associate degree	8,847	5.7	16,641	5%	24600	6%	155440	5.4
Bachelor's degree	18,415	11.9	58,332	19%	68866	16%	351772	12.2
Graduate or professional degree	10,258	6.6	33,573	11%	37,967	9%	197836	6.9
Total	**154,953**		**306,837**		**34,158**		**2,887,400**	
Percent high school graduate or higher		76.0%		82.0%		81.0%		75.0%
Percent bachelor's degree or higher		18.50%		58.0%		53.0%		19.0%

(a) Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b) Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.

Data Sources: ESRI Business Analyst on Line, U.S. Bureau of the Census: State and County Quick Facts, Population Estimates, 2000 Census of Population and Housing: Summary File 1.

Table B-7: Job Distribution by Industry, 2005

	Primary Area (a)		Secondary Area (b)	
Employed Population 16+ By Industry	*number*	*percent*	*number*	*percent*
Agriculture/Mining	268	0.4%	7,262	0.4%
Construction	2,815	4.2%	8,351	4.6%
Manufacturing	4,959	7.4%	13,435	7.4%
Wholesale trade	2,882	4.3%	8,170	4.5%
Retail trade	7,238	10.8%	21,241	11.7%
Transportation/Utilities	3,217	4.8%	8,533	4.7%
Information	1,742	2.6%	4,720	2.6%
Finance/Insurance/Real Estate	6,032	9.0%	17,610	9.7%
Services	35,184	52.5%	91,139	50.2%
Public Administration	2,748	4.1%	7,262	4.0%
Employed Population 16+ By Occupation				
Total	67,019		181,551	
White Collar	39,072	58.3%	119,281	65.7%
Management/Business/Financial	6,367	9.5%	23,239	12.8%
Professional	14,543	21.7%	44,298	24.4%
Sales	7,841	11.7%	25,417	14.0%
Administrative Support	10,320	15.4%	26,325	14.5%
Services	14,677	21.9%	29,956	16.5%
Blue Collar	13,270	19.8%	32,316	17.8%
Farming/Forestry/Fishing	134	0.2%	181	0.1%
Construction/Extraction	2,413	3.6%	6,536	3.6%
Installation/Maintenance/Repair	2,212	3.3%	6,354	3.5%
Production	3,686	5.5%	8,170	4.5%
Transportation/Material Moving	4,825	7.2%	11,075	6.1%
Civilian Employed (16+)		86.6%		91.1%
Civilian Unemployed (16+)		13.4%		8.9%

(a) Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b) Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.
Data Sources: ESRI Business Analyst on Line, U.S. Bureau of the Census: State and County Quick Facts, Census 2000 Summary File 3.

Table B-8: Consumer Expenditures, 2005

Consumer Expenditure Category	Primary Area (a)	Secondary Area (b)
Food at Home: Total $	$218,038,656	$728,246,601
Average Spent	$3,057.57	$4,151.52
Spending Potential Index	64	87
Food away from home: Total $	$149,232,203	$499,624,937
Average Spent	$2,092.70	$2,848.21
Spending Potential Index	65	88
Retail Goods: Total $	$1,057,314,474	$3,622,699,581
Average Spent	$14,826.81	$20,651.93
Spending Potential Index	59	82

(a) Primary Market Area includes all Census block groups located within a five-mile radius of proposed market site.
(b) Secondary Market Area includes all Census block groups located within a ten-mile radius of proposed market site.

Data note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.
Data Source: ESRI Business Analyst on Line.

APPENDIX C: SURVEY RESPONSES, MARKET AREA HOUSEHOLD RESIDENTS, 2006

1. Have you heard of the Birmingham Farmers Market?

	Number of Responses	Percent
No	29	5.8%
Yes	473	94.2%
Total	**502**	**100%**

2. Have you ever visited the Birmingham Farmer's Market? If so, have you been there in the past two years?

	Number of Responses	Percent
Yes, I have been there during the past two years	261	52.0%
Yes, visited, but not in the last two years	144	28.7%
No, never been there	68	13.5%
No response	29	5.8%
Total	**502**	**100%**

3. If there were a Public Market in Birmingham, how likely would you be to shop there?

	Number of Responses	Percent
Very likely	204	40.6%
Likely	138	27.5%
Somewhat likely	113	22.5%
Not likely that I would shop there	43	8.6%
Don't know/No opinion	4	0.8%
Total	**502**	**100%**

4. If a permanent, year-round Public Market was open every day until at least 7:00pm on Finley Avenue West, about how often do you think you would shop there?

	Number of Responses	Percent
Several times per month	187	37.3%
Once per month	129	25.7%
Less than once per month	78	15.5%
Never	53	10.6%
Several times per week	43	8.6%
Don't know/No opinion/It depends	12	2.4%
Total	**502**	**100%**

5. Would this location (Finley Avenue) influence your interest in visiting the Public Market, and if so, would it be a positive or negative influence?

	Number of Responses	Percent
Positively influence	280	55.8%
Negatively influence	146	29.1%
Neutral/No opinion	76	15.1%
Total	**502**	**100%**

5 (a). Reason for positive influence of location

	Number of Responses	Percent
Close to home/Convenient to home	42	8.4%
Convenient and/or close (did not specify to home or work)	40	8.0%
Because they have fresh, good produce/fresh products	27	5.4%
Location (reason unspecified)	17	3.4%
It would be good for the area -- bring people in, revitalize	16	3.2%
It is a nice location; a friendly area; a good environment	15	3.0%
Familiar with the area; accustomed to shopping there	11	2.2%
It is centrally located; close to other stores or restaurants; close to the original farmer's market	9	1.8%
Close to work and/or on the way to and from work	7	1.4%
It is right off of the Interstate; accessible	7	1.4%
Good prices deals	7	1.4%
Products are from Alabama farmers; to support local farmers	7	1.4%
Because it offers something different	5	1.0%
Like/love going to the farmer's market	5	1.0%
Other reasons	240	47.8%
Don't know/No answer	47	9.4%
Total	**502**	***100.0%***

5 (b). Reason for negative influence of location

	Number of Responses	Percent
Too far from work or home; not centrally located	85	16.9%
The area that it is in - not safe, high crime	31	6.2%
Not a good location (no other reason specified)	15	3.0%
Too far from work or home; not centrally located	7	1.4%
Too much traffic	5	1.0%
Too much traffic	5	1.0%
The area that it is in - not safe, high crime	2	0.4%
Do not like the farmers' market	1	0.2%
Other	10	2.0%
Don't know, No Answer	341	67.9%
Total	**502**	**100%**

6. How important are the following aspects when deciding whether to shop at the proposed Public Market?

	Very Important	Somewhat Important	Not Important or No Answer	Total
	percent.	*percent.*	*percent.*	*number*
Competitive prices (with supermarkets)	76.7	16.3	7.0	502
Open in the evenings on weekdays	62.5	20.3	17.1	502
Open in the evenings on weekends	61.6	18.5	19.9	502
Selection of fresh meats	58.8	23.1	18.1	502
Selection of fresh fish	51.0	25.7	23.3	502
Selection of fresh breads; other bakery items	38.2	34.9	26.9	502
Selection of frozen foods	31.9	33.5	34.7	502
Selection of organic products	28.3	29.7	42.0	502
Selection of take out meals	27.9	32.1	40.0	502
Selection of Alabama wines	19.7	28.5	51.8	502
Selection of dried/fresh flowers	17.7	21.1	61.2	502
Selection of halal or kosher meats	15.3	21.1	63.5	502

7. When thinking about traveling to the Public Market, how important is the following aspects?

	Very Important	Somewhat Important	Not Important or No Answer	Total
	percent.	*percent.*	*percent.*	*number*
Free parking	87.5	10.0	2.6	502
Nearby parking	81.1	13.7	5.2	502
Presence of security	67.3	18.5	14.1	502
Accessibility	63.5	24.5	12.0	502
Distance from home	59.6	27.1	13.3	502
Distance from work place	30.3	22.9	46.8	502

8. How likely would you and your household members be to use the following education events that may be offered by the Public Market?

	Very Likely	Somewhat Likely	Unlikely	Total
	percent.	*percent.*	*percent.*	*number*
Gardening workshops	32.3	31.7	36.1	502
Bookstore focusing on cooking/gardening	30.1	38.4	31.5	502
Cooking classes for adults	29.9	35.1	35.1	502
Exhibits about local farming and agricultural history	20.9	33.9	45.2	502
Events about agriculture issues	18.9	31.5	49.6	502

Grocery Shopping

9. When do you do most of your food shopping?

	Number of Responses	Percent
Both/about the same	283	56.4%
Weekdays (Monday to Friday)	114	22.7%
Weekends (Saturday and Sunday)	100	19.9%
Don't know/No opinion	5	1.0%
Total	**502**	**100%**

10. What time of day do you do most of your shopping?

	Number of Responses	Percent
Morning (before 11:30am)	141	28.1%
Afternoon (1:30pm to 5:00pm)	138	27.5%
Evening (5:00pm to 8:00pm)	129	25.7%
Other	35	7.0%
Lunch time (11:30am to 1:30pm)	29	5.8%
Don't know/No opinion	19	3.8%
Night (after 8:00pm)	11	2.2%
Total	**502**	**100%**

11. At what grocery store do you do most of your shopping?

	Number of Responses	Percent
Wal-Mart	134	26.7%
Publix	97	19.3%
Piggly Wiggly	64	12.7%
Food world	53	10.6%
Winn Dixie	46	9.2%
Bruno's	34	6.8%
Western	16	3.2%
Other	15	3.0%
Food Giant	10	2.0%
Southern Family Market	10	2.0%
Don't know/No answer	9	1.8%
Food smart	5	1.0%
Everywhere; no preferred store	5	1.0%
Food Land	3	0.6%
Sam's	1	0.2%
Total	**502**	**100%**

12. On average, how often do you shop at your preferred store?

	Number of Responses	Percent
2 or 3 times per week	225	44.8%
Once per week	165	32.9%
Once every 2 weeks	46	9.2%
Everyday	33	6.6%
Less than once every 2 weeks	26	5.2%
Don't know/No answer	7	1.4%
Total	**502**	**100%**

13. What are the main reasons you shop at your first choice store?

	Number of Responses	Percent
Convenient location to home	120	24.0%
Prices	79	16.0%
Selection of meats/other	64	13.0%
Quality of merchandise	55	11.0%
Customer service	41	8.0%
Selection of specialty products	38	8.0%
Hours open	31	6.0%
Convenient location to work	27	5.0%
Selection of organics	11	2.0%
Selection beer and wine	9	2.0%
See my friends/neighbors	7	1.0%
Other	17	3.0%
Don't know/ No opinion	3	1.0%
Total	**502**	**100.0%**

Other responses include

Convenience (from work or home not specified), Variety; they offer everything, Cleanliness, Selection of produce, Friendly atmosphere; friendly employees

14. Which of the following statements best describes your typical visit to your preferred store?

	Number of Responses	Percent
I usually go straight from work to this store	90	17.9%
I usually go from home to this store	347	69.1%
Other	54	10.8%
Don't know/No answer	11	2.2%
Total	**502**	**100.0%**

15. How do you get to your shopping place?

	Number of Responses	Percent
Car	490	97.6%
Bicycle	1	0.2%
Other public transportation (bus or street car)	2	0.4%
Walk	4	0.8%
Other	2	0.4%
Don't know/No Answer	3	0.6%
Total	**502**	**100%**

16. How many minutes does it usually take you to get from your (home or workplace) to your preferred store?

	Number of Responses	Percent
Less than 5 minutes	139	27.7%
5 to 9 minutes	132	26.3%
10 to 14 minutes	127	25.3%
15 to 19 minutes	46	9.2%
20 to 30 minutes	42	8.4%
More than 30 minutes	5	1%
Don't know/No Answer	11	2.2%
Total	**502**	**100%**

17. What is the second most frequent store you shop at for food?

	Number of Responses	Percent
Winn Dixie	58	11.6%
Western	27	5.4%
Publix	46	9.2%
Bruno's	41	8.2%
Wal-Mart	93	18.5%
Piggly Wiggly	67	13.3%
Food World	67	13.3%
Food Smart	1	0.2%
Food Giant	6	1.2%
Food Land	2	0.4%
Southern Family Market	17	3.4%
Sam's	5	1%
Costco	5	1%
Marino's	4	0.8%
Other	31	6.2%
No second-choice store	32	6.4%
Total	**502**	**100%**

18. What are the main reasons you shop at the second choice store?

	Number of Responses	Percent
Selection of meats	29	5.8%
Selection of organic foods	2	0.4%
Selection of specialty products	3	0.6%
Selection of produce	17	3.4%
Convenient location to home	38	7.6%
Convenient location to work (or on the way home from work)	11	2.2%
Convenient location (unspecified)	73	14.5%
Hours open	3	0.6%
Prices/discounts	89	17.7%
Quality of merchandise	15	3.0%
Customer service	6	1.2%
Good selection, products they sell (unspecified)	27	5.4%
Variety; they offer everything	9	1.8%
Cleanliness	5	1.0%
Can get other items you need in addition to groceries	19	3.8%
To find items that were not at their first-choice store	15	3.0%
Convenience; Easy to get in and out quickly	54	10.8%
No second-choice store	32	6.4%
Other	29	5.8%
No specific reason/none	26	5.2%
Total	**502**	**100%**

19. Which would you say is more important to you when deciding where to shop for food -- price or quality?

	Number of Responses	Percent
Price	90	17.9%
Quality	353	70.3%
Don't know/No answer	59	11.8%
Total	**502**	**100%**

20. What types of ethnic foods, if any, do you typically like prepared at home?

	Number of Responses	Percent
Mexican	75	15.0%
Italian	86	17.0%
Japanese	13	3.0%
Vietnamese	4	1.0%
Chinese	47	9.0%
Thai	7	1.0%
Soul Food	82	16.0%
Middle-Eastern	10	2.0%
African (e.g. Ethiopian)	11	2.0%
Asian (general)	17	3.0%
Indian	8	2.0%
Kosher	5	1.0%
American	117	23.0%
Other	9	2.0%
Don't buy any ethnic food/No Answer	12	2.0%
Total	**502**	***100.0%***

21. Importance of the following when buying meat, fish and poultry: Raised in Alabama

	Number of Responses	Percent
Don't know/No answer	9	1.8%
Not important	177	35.3%
Somewhat important	155	30.9%
Very important	161	32.1%
Total	**502**	**100%**

22. When buying meat, fish and poultry, how important are the following choices?

	Very Important	Somewhat Important	Not Important or No Answer	Total Responses
	percent.	*percent.*	*percent.*	*number*
Raised in Alabama	32.1%	30.9%	37.1%	502
Raised in the United States	70.5%	21.1%	8.4%	502
Raised without hormones	59.8%	20.7%	19.5%	502

23. When buying cheese and other dairy products, how important are the following choices?

	Very Important	Somewhat Important	Not Important or No Answer	Total Responses
	percent.	*percent.*	*percent.*	*number*
Raised in Alabama	31.7%	25.9%	26.5%	502
Raised in the United States	64.3%	21.5%	14.1%	502
Produced without hormones	60.2%	17.9%	21.9%	502

24. When buying other types of food and groceries, how important are the following choices?

	Very Important	Somewhat Important	Not Important or No Answer	Total Responses
	percent.	*percent.*	*percent.*	*number*
Produced in Alabama	39.4%	31.7%	28.9%	502
Produced in the United States	67.7%	20.7%	11.6%	502
Produced without pesticides	70.9%	14.3%	14.7%	502
Produced without hormones	64.1%	18.7%	17.1%	502

Demographics

25. How many people live in your household including yourself?

	Number of Responses	Percent
One to two people	248	49%
Three people	118	24%
Four to five people	113	23%
Six people or more	17	3%
No Response	6	1%
Total	**502**	**100%**

26. Including yourself, how many adults live in your household?

Adults in household	Number of Responses	Percent
One adults	129	25.7%
Two adults	267	53.2%
Three adults	73	14.5%
Four adults	21	4.2%
Five adults	3	0.6%
Six or more	1	0.2%

No Answer/Refused	8	1.6%
Total	**502**	**100%**

27. What is your age?

	Number of Responses	Percent
less than 26	25	5.0%
26 to 35 years	54	10.8%
36 to 45 years	87	17.0%
46 to 55 years	139	27.7%
56 to 65 years	102	20.3%
66 to 75 years	52	10.4%
76 years and above	22	4.4
No answer/Refused	21	4.2%
Total	**502**	**100%**

28. Which of the following best describes your marital status?

	Number of Responses	Percent
Single, divorced or widowed	208	41.4%
Living together	15	3.0%
Married	267	53.2%
No answer/Refused	12	2.4%
Total	**502**	**100%**

29. Do you have children under 18 living in your household?

	Number of Responses	Percent
No	308	61.4%
Yes	183	36.5%
No answer/Refused	11	2.2%
Total	**502**	**100%**

30. What is the highest level of education you have completed?

	Number of Responses	Percent
High school graduate or less	125	24.9%
Vocational or technical training	20	4.0%
Some college	119	23.7%
College graduate	144	28.7%
Post-graduate/professional work or degree	79	15.7%
No answer/Refused	15	3.0%
Total	**502**	**100%**

31. Do you consider yourself to be of Hispanic origin?

	Number of Responses	Percent
No	477	95%
Yes	18	3.6%
No answer/Refused	7	1.4%
Total	**502**	**100%**

32. What race do you identify with?

	Number of Responses	Percent
Caucasian/White	267	53.2%
African-American/Black	209	41.6%
Asian	1	0.2%
Other	15	3.0%
No answer/Refused	10	2.0%
Total	502	100%

33. About how much does your household spend on groceries in a typical week?

	Number of Responses	Percent
Less than $25	9	1.8%
$25 to $49	50	10%
$50 to $74	110	22.0%
$75 to $99	84	16.8%
$100 to $149	119	24.0%
$150 or more	93	18.6%
Don't know/Refused	37	7.4%
Total	**502**	**100%**

34. What was the combined annual income for your entire household last year?

	Number of Responses	Percent
Less than $15,000	25	5.0%
$15,000 to $24,999	36	7.2%
$25,000 to $34,999	30	6.0%
$35,000 to $49,999	56	11.2%
$50,000 to $99,999	97	19.3%
$100,000 to $150,000	42	8.4%
More than $150,000	27	5.4%
Don't know/Refused	189	37.7%
Total	**502**	**100%**

35. **In what zip code do you live?**

	Number of Responses	Percent
35211	33	6.6%
35216	31	6.2%
35206	29	5.8%
35214	29	5.8%
35226	28	5.6%
35243	26	5.2%
35217	25	5.0%
35209	23	4.6%
35213	21	4.2%
35071	20	4.0%
35205	16	3.2%
35127	14	2.8%
35210	14	2.8%
35223	14	2.8%
35208	13	2.6%
35222	13	2.6%
35212	12	2.4%
35207	11	2.2%
35005	9	1.8%
35117	9	1.8%
35204	9	1.8%
35228	9	1.8%
35234	9	1.8%
35068	8	1.6%
35218	8	1.6%
35224	7	1.4%
35064	6	1.2%
35215	6	1.2%
35221	5	1.0%
35242	4	0.8%
35073	3	0.6%
35022	2	0.4%
35062	2	0.4%
35118	2	0.4%
35203	2	0.4%
35235	2	0.4%
35023, 35061, 35119, 35124, 35130, 35180, 35219, 35225, 35256, 35311, 35444, 36511 38205, 75325	14	2.8%
No Answer/Refused	14	2.8%
Total	**502**	**100%**

36. In what zip code do you work?

	Number of Responses	Percent
35209	25	5.0%
35203	16	3.2%
35205	16	3.2%
35216	13	2.6%
35244	11	2.2%
35211	10	2.0%
35223	9	1.8%
35233	9	1.8%
35243	9	1.8%
35217	8	1.6%
35210	7	1.4%
35222	7	1.4%
35213	6	1.2%
35215	6	1.2%
35226	6	1.2%
35294	6	1.2%
35206	5	1.0%
35214	5	1.0%
35234	5	1.0%
35242	5	1.0%
35020	4	0.8%
35071	4	0.8%
35202	4	0.8%
35212	4	0.8%
35218	4	0.8%
35064	3	0.6%
35124	3	0.6%
35221	3	0.6%
35094	2	0.4%
35207	2	0.4%
35208	2	0.4%
35228	2	0.4%
35229	2	0.4%
35235	2	0.4%
35285	2	0.4%
32071, 35005, 35023, 35024, 35028 35040, 35105, 35111, 35117, 35122, 35126, 35130, 35148, 35204, 35219, 35220, 35224, 35249	18	3.6%
No Answer/ Refused	257	51.5%
Total	**502**	**100%**

1. Factors affecting likely use of the Public Market by reported downtown work location, 2006 Birmingham telephone survey

Factors affecting likely use of the Public Market	Birmingham sample	
	Do not work downtown	Work downtown
	percent	*percent*
Importance when thinking about traveling to the Public Market:		
Nearby parking		
Not important	5	2
Somewhat important	12	17
Very important	83	81
Free parking		
Not important	1	2
Somewhat important	9	12
Very important	90	87
Distance from home		
Not important	13	11
Somewhat important	27	28
Very important	59	62
Accessibility from my house		
Not important	11	9
Somewhat important	26	24
Very important	63	67
Presence of a security guard		
Not important	11	16
Somewhat important	18	19
Very important	70	65
Distance from work place (X^2 =12.5, p<.01)		
Not important	50	34
Somewhat important	21	29
Very important	29	37
Likelihood to use the following education event that may be offered by the Public Market:		
Cooking classes for adults (X^2 =6.9, p<.05)		
Unlikely	39	28
Somewhat likely	32	40
Very likely	28	33

Factors affecting likely use of the Public Market	Do not work downtown	Work downtown
	Percent	Percent
Gardening workshops		
Unlikely	36	34
Somewhat likely	30	34
Very likely	34	31
Bookstore focusing on cooking and gardening		
Unlikely	31	30
Somewhat likely	38	40
Very likely	31	30
Exhibits about Alabama farming and agricultural history		
Unlikely	45	43
Somewhat likely	32	38
Very likely	23	20
Events about agricultural issues		
Unlikely	49	48
Somewhat likely	31	33
Very likely	20	18
Number	**286**	**216**

2. Product characteristics shaping Public Market shopping by reported downtown work location, 2006 Birmingham telephone survey

Product characteristics shaping Public Market shopping	Birmingham sample	
	Do not work downtown	Work downtown
	percent	*percent*
Importance when deciding whether to shop at the proposed Public Market:		
Selection of fresh breads and other bakery items		
Not important	25	29
Somewhat important	36	33
Very important	39	38
Selection of fresh fish		
Not important	25	20
Somewhat important	26	26
Very important	49	54
Selection of fresh meats		
Not important	20	15
Somewhat important	24	22
Very important	56	63
Selection of halal or kosher meats		
Not important	63	60
Somewhat important	22	22
Very important	15	17
Selection of take out meals		
Not important	37	42
Somewhat important	32	33
Very important	31	25
Selection of organic foods		
Not important	43	38
Somewhat important	29	31
Very important	27	31
Selection of Alabama wines		
Not important	53	49
Somewhat important	29	29
Very important	19	22

Product characteristics shaping Public Market shopping	Do not work Downtown	Work downtown
Selection of frozen foods	Percent	Percent
Not important	34	35
Somewhat important	33	35
Very important	33	31
Selection of dried flowers		
Not important	58	63
Somewhat important	23	19
Very important	18	18
Competitive prices (with supermarkets)		
Not important	8	4
Somewhat important	17	16
Very important	75	80
Open in the evenings on weekdays		
Not important	16	15
Somewhat important	24	17
Very important	60	68
Open in the evenings on weekends		
Not important	21	16
Somewhat important	19	19
Very important	60	66
Number	**286**	**216**

3. Ethnic foods prepared at home by reported downtown work location, 2006 Birmingham telephone survey

Ethnic foods prepared at home	Birmingham sample	
	Do not work downtown	Work downtown
	percent	*percent*
Ethnic foods prepared at home:		
American	66	61
Italian	44	50
Mexican (X^2 =14.4, p<.01)	33	50
Soul Food	42	47
Chinese	22	25
Asian (in general)	12	8
Japanese	8	7
Indian	4	6
Thai	4	5
Middle-Eastern	7	5
African (e.g. Ethiopian)	8	5
Other	7	3
Kosher or Halal	3	3
Vietnamese	2	2
Don't know/No answer	9	4
Number	**286**	**216**

4. Factors shaping food shopping choices by reported downtown work location, 2006 Birmingham telephone survey

Factors shaping food shopping choices	Birmingham sample: Do not work downtown	Birmingham sample: Work downtown
	percent	*percent*
Which would you say is more important to you when deciding where to shop for food -- price or quality?		
Price	20	21
Quality	80	80
Importance of the following when buying meat, fish and poultry:		
Raised in Alabama (X^2 =6.9, p<.05)		
Not important	34	39
Somewhat important	29	35
Very important	38	26
Raised in the United States		
Not important	7	8
Somewhat important	19	24
Very important	74	67
Raised without hormones		
Not important	16	14
Somewhat important	20	24
Very important	63	62
Importance of the following when buying cheese and other dairy products:		
From Alabama		
Not important	39	43
Somewhat important	26	27
Very important	35	30
From the United States		
Not important	11	16
Somewhat important	23	20
Very important	66	64
Produced without hormones		
Not important	15	20
Somewhat important	19	19
Very important	65	62

	Do not work downtown	Work downtown
Importance of the following when buying other types of food and groceries:	percent	percent
Produced in Alabama		
Not important	26	31
Somewhat important	32	32
Very important	42	37
Produced in the United States		
Not important	10	13
Somewhat important	21	20
Very important	68	67
Produced without pesticides		
Not important	13	13
Somewhat important	15	14
Very important	72	72
Number	**286**	**216**

5. Public Market location concerns by reported downtown work location, 2006 Birmingham telephone survey

Public Market location concerns	Birmingham sample	
	Do not work downtown	Work downtown
	percent	*percent*
Would this location (Finley Avenue) influence your interest in visiting the Public Market, and if so, would it be a positive or negative influence?		
Positively influence	57	54
Negatively influence	27	31
Neutral/No opinion	15	15
Reason for positive influence of location (multiple responses possible)		
Because they have fresh, good produce/fresh products	32	84
Close to home/Convenient to home	15	15
Convenient and/or close (did not specify to home or work)	14	15
It is a nice location; a friendly area; a good environment	23	12
It would be good for the area -- bring people in, revitalize	16	12
It is right off of the Interstate; accessible	2	11
Products are from Alabama farmers; to support local farmers	2	11
Close to work and/or on the way to and from work	2	10
Good prices; deals	47	10
It is centrally located; close to other stores or restaurants; close to the original farmer's market	4	10
Familiar with the area; accustomed to shopping there	8	7
Location (reason unspecified)	6	6
Because it offers something different	1	2
The farmers/employees are nice, kind	12	1
Like/love going to the farmer's market	3	
Don't know/No answer	14	21
Reason for negative influence of location (multiple responses possible)		
Too far from work or home; not centrally located	83	81
The area that it is in - not safe, high crime	90	71
Too much traffic	3	25
Not a good location (no other reason specified)	10	10
Other	10	3
Do not like the farmer's market	1	
Don't know, No Answer	3	7
Number	**286**	**216**

6. Knowledge and experience with the Birmingham Farmers Market by reported downtown work location, 2006 Birmingham telephone survey

Knowledge and experience with the Birmingham Farmers Market	Birmingham sample	
	Do not work downtown	Work downtown
	percent	*percent*
Have you heard of the Birmingham Farmers Market?		
No	7	4
Yes	93	96
Have you ever visited the Birmingham Farmer's Market? If so, have you been there in the past two years?		
No, never been there	12	18
Yes, visited, but not in the last two years	32	29
Yes, I have been there during the past two years	56	54
If there were a Public Market in Birmingham, how likely would you be to shop there?		
Not likely that I would shop there	10	7
Somewhat likely	23	22
Likely	24	32
Very likely	42	39
If a permanent, year-round Public Market were open every day until at least 7:00pm on Finley Avenue West, about how often do you think you would shop there?		
Never	12	9
Less than once per month	14	18
Once per month	25	28
Several times per month	42	34
Several times per week	8	10
Number	**286**	**216**

7. Shopping preferences and experiences by reported downtown work location, 2006 Birmingham telephone survey

Shopping preferences and experiences	Birmingham sample	
	Do not work downtown	Work downtown
	percent	*percent*
Which of the following statements best describes your typical visit to your preferred store?		
I usually go straight from work to this store	11	28
I usually go from home to this store	81	57
Other	9	14
What are the main reasons you prefer to shop at this store? (multiple responses possible)		
Convenient location to home	55	62
Selection of produce	36	51
Prices	45	43
Cleanliness	15	40
Friendly atmosphere; friendly employees	33	37
Selection of meats	30	31
Quality of merchandise	27	29
Variety; they offer everything	9	29
Customer service	22	22
Hours open	19	19
Convenient location to work	13	18
Selection of specialty products	19	16
Selection of organics	10	11
Convenience (from work or home not specified)	12	7
Selection of beer and wine	5	7
See my friends and neighbors	3	5
Don't know/No opinion	2	1
On average, how often do you shop at your preferred store?		
Everyday	7	7
2 or 3 times per week	46	45
Once per week	30	37
Once every 2 weeks	11	7
Less than once every 2 weeks	6	4
How many minutes does it usually take you to get from your (home or workplace) to your preferred store?		
Less than 5 minutes	27	31
5 to 9 minutes	27	26
10 to 14 minutes	27	25

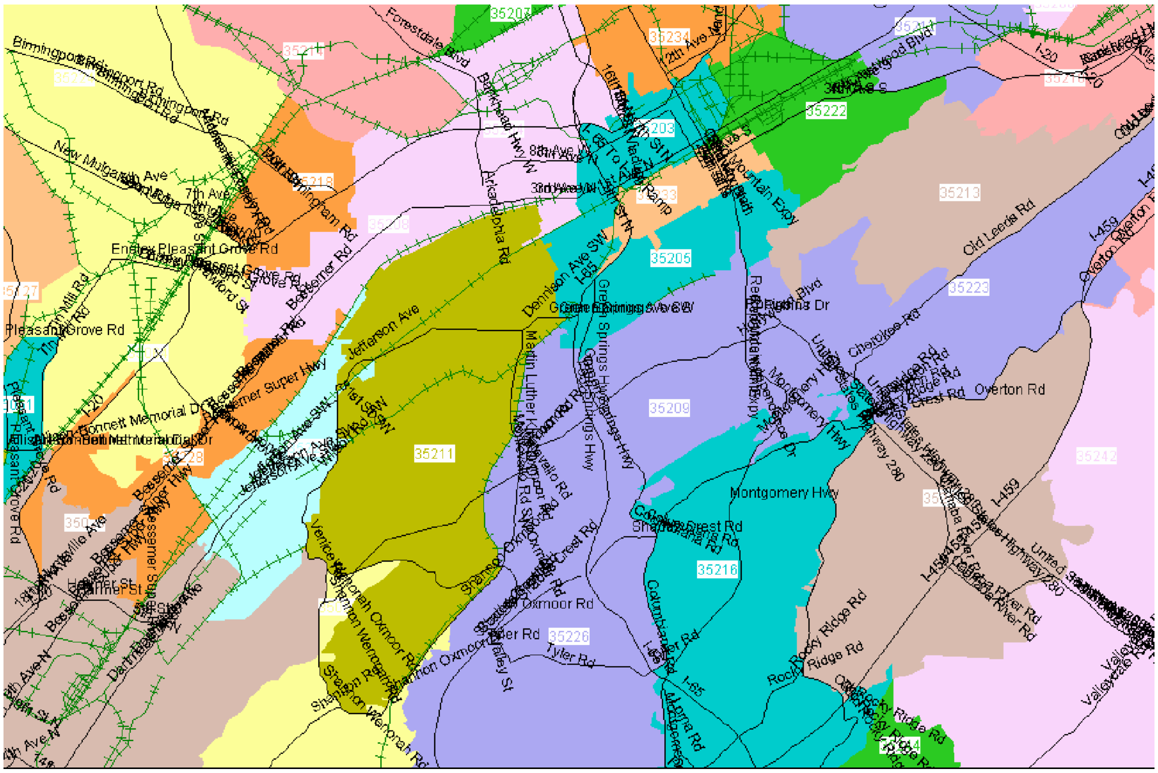
	Do not Work downtown	Work downtown
	percent	percent
15 to 19 minutes	10	9
20 to 30 minutes	9	8
More than 30 minutes	1	0
How do you get to your shopping place?		
Car	98	99
Bicycle		0
Other public transportation (bus or street car)	0	0
Walk	1	0
Other	1	
Do you do most of your food shopping on... (X^2 =8.5, $p<.05$)		
Weekdays (Monday to Friday)	27	18
Weekends (Saturday and Sunday)	16	25
Both/about the same	57	57
What time of day do you do most of your shopping? (X^2 =25.6, $p<.05$)		
Morning (before 11:30am)	36	21
Lunch time (11:30am to 1:30pm)	7	4
Afternoon (1:30pm to 5:00pm)	26	32
Evening (5:00pm to 8:00pm)	20	36
Night (after 8:00pm)	2	3
Other	10	4
Which of the following statements best describes your typical visit to your preferred store? (X^2 =33.4, $p<.001$)		
I usually go straight from work to this store	11	28
I usually go from home to this store	81	57
Other	9	14
Number	**286**	**216**

8. Respondent characteristics by reported downtown work location, 2006 Birmingham telephone survey

Respondent characteristics	Birmingham sample	
	Do not work downtown	Work downtown
	percent	*percent*
What was the combined annual income for your household last year? (X^2 =19.3, p<.01)		
Less than $15,000	12	4
$15,000 to $24,999	13	10
$25,000 to $34,999	11	8
$35,000 to $49,999	21	14
$50,000 to $99,999	25	38
$100,000 to $150,000	9	18
More than $150,000	9	8
What is the highest level of education you have completed? (X^2 =33.1, p<.01)		
High school graduate or less	35	14
Vocational or technical training	4	4
Some college	23	26
College graduate	23	38
Post-graduate/professional work or degree	14	19
Age of the respondent (X^2 =53.5, p<.01)		
29 or younger	6	12
30 to 49 years	27	46
50 to 65 years	42	39
Over 65 years	25	3
What race do you identify with?		
Caucasian/White	57	51
African-American/Black	40	46
Other	3	3
Do you consider yourself to be of Hispanic origin?	4	3
Have children under 18 living in your household?	34	41
Which of the following best describes your marital status?		
Single, divorced or widowed	42	43
Living together	3	3
Married	55	54

	Do not work downtown	Work downtown
	Percent	percent
How many people live in your household including yourself?		
One	19	16
Two	34	29
Three	22	26
Four or more people	24	29
Number	**286**	**216**

APPENDIX E: DOWNTOWN ZIP CODES



APPENDIX F: GROCERY STORES

Food Fair
1157 Bankhead Hwy W, Birmingham, AL (0.78 miles away) 205-251-0376

Food Fair Market
1500 18th Pl N, Birmingham, AL (1.38 miles away) 205-251-2894

Fresh Land Super Market
1 8th Ave N, Birmingham, AL (1.48 miles away) 205-322-9911

Mike's Corner
101 8th Ave N, Birmingham, AL (1.51 miles away) 205-254-9014

19th Street Curb Market
1324 19th St N, Birmingham, AL (1.54 miles away) 205-322-2650

Salamone Grocery Stores Inc
2219 24th St N, Birmingham, AL (1.59 miles away) 205-251-7054

Food Fair
2400 29th Ave N, Birmingham, AL (1.67 miles) 205-323-3931

E & P Supermarket
130 Graymont Ave N, Birmingham, AL (1.69 miles away) 205-715-0072

Sam's Super Mart
401 Graymont Ave N, Birmingham, AL (1.79 miles away) 205-254-8649

Circle G
734 Graymont Ave W, Birmingham, AL (1.79 miles away) 205-787-3153

Piggly Wiggly
2612 30th Ave N, Birmingham, AL (1.88 miles away) 205-323-5453

Sam Finocchio Grocery
448 6th St N, Birmingham, AL (1.92 miles away) 205-254-8846

City Wholesale Slush
2700 13th St W, Birmingham, AL (2.23 miles away) 205-781-5300

Jack's Food Store
2831 29th St N, Birmingham, AL (2.24 miles away) 205-323-6812

West End Food
402 Tuscaloosa Ave SW, Birmingham, AL (2.31 miles away)
205-322-4411

Family Supermarket
513 23rd St N, Birmingham, AL (2.45 miles away) 205-252-4726

Alfano's Super Saver
3009 Fl Shuttlesworth Dr, Birmingham, AL (2.54 miles away)
205-849-7714

Hawk's Food & Beverage Ctr
118 1st St S, Birmingham, AL (2.59 miles away) 205-324-1413

Williams Food
12 1st Ave SW, Birmingham, AL (2.64 miles away) 205-322-3385

A & M Grocery
2716 33rd St N, Birmingham, AL (2.68 miles) 205-326-0733

Torme Foods
2422 2nd Ave N, Birmingham, AL (2.70 miles away) 205-251-0461

Montgomery Grocery
3148 33rd Ter N, Birmingham, AL (2.72 miles away) 205-849-7911

Sheba Foods
1116 Tuscaloosa Ave SW, Birmingham, AL (2.79 miles away) 205-786-7826

Nana's Supermarket
400 1st St S, Birmingham, AL (2.79 miles away) 205-323-8004

Green Front Grocery
400 6th Ave S, Birmingham, AL (2.89 miles away) 205-324-8444

Food Fair
1218 6th Ave S, Birmingham, AL (2.91 miles away) 205-323-4391

Circle N Grocery
301 6th Ave S, Birmingham, AL (2.91 miles away) 205-252-3852

Shaw's Grocery
1231 Avenue H, Birmingham, AL (2.94 miles away) 205-788-3500

Lusco Food
3800 Fl Shuttlesworth Dr, Birmingham, AL (3.02 miles away) 205-841-2543

La Estrellida
1100 10th St S, Birmingham, AL (3.31 miles away) 205-322-0515

Ensley Foods
1432 20th Street Ensley, Birmingham, AL (3.32 miles away) 205-785-5333

Graffeo Brothers Grocery
1700 Avenue I Ensley, Birmingham, AL (3.38 miles away) 205-788-7871

Save-A-Lot
1292 Forestdale Blvd, Birmingham, AL (3.42 miles away) 205-798-9066

Ensley's Supermarket
1128 22nd St, Birmingham, AL (3.46 miles away) 205-787-5430

South Town Market
2321 9th Ct S, Birmingham, AL (3.52 miles away) 205-323-3224

Piggly Wiggly
1697 Tuscaloosa Ave SW, Birmingham, AL (3.54 miles away) 205-925-6744

Five Points Market
1904 11th Ave S, Birmingham, AL (3.55 miles) 205-254-9132

Southside Market Inc
1600 11th Pl S, Birmingham, AL (3.65 miles away) 205-322-1128

Ivy's Market Inc
1401 15th St S, Birmingham, AL (3.66 miles away) 205-212-1031

Food Fair
2200 Avenue D, Birmingham, AL (3.70 miles) 205-788-1991

Marino's Associated Foods
1965 Bessemer Rd, Birmingham, AL (3.71 miles away) 205-780-0688

Lorino's Food Ctr
1531 13th Pl S, Birmingham, AL (3.72 miles away) 205-930-0235

Food Fair
315 36th St S, Birmingham, AL (3.73 miles away) 205-788-7232

Food World
885 Dennison Ave SW, Birmingham, AL (3.75 miles away) 205-323-3096

Marino's Associated Foods
2415 Avenue E, Birmingham, AL (3.79 miles away) 205-780-0685

Western Supermarkets
2230 Highland Ave S, Birmingham, AL (3.82 miles away) 205-933-6220

Discount Foods
3945 Vanderbilt Rd, Birmingham, AL (3.92 miles away) 205-849-7777

Piggly Wiggly
3314 Clairmont Ave S, Birmingham, AL (3.93 miles away) 205-252-0684

Kings Foods
4301 Richard Arrington Jr Blvd, Birmingham, AL (4.05 miles away) 205-591-6828

Piggly Wiggly

1619 Forestdale Blvd, Birmingham, AL (4.12 miles away) 205-791-1833

Munchie's Food Store
4100 5th Ave S, Birmingham, AL (4.16 miles away) 205-592-9340

Kingston Grocery
892 44th Pl N, Birmingham, AL (4.16 miles away) 205-591-7888

V Richards Market
3908 Clairmont Ave S, Birmingham, AL (4.30 miles away) 205-591-7000

Circle C Food
4300 E Lake Blvd, Birmingham, AL (4.31 miles away) 205-849-3088

Asian Food Market
22 Green Springs Hwy, Homewood, AL (4.32 miles away) 205-941-1009

Eastern Associated Foods
4649 10th Ave N, Birmingham, AL (4.43 miles away) 205-592-4764

Gordo's Market
433 Valley Ave, Birmingham, AL (4.50 miles away) 205-916-0707

Food World
1940 Veterans Memorial Dr, Birmingham, AL (4.59 miles away) 205-798-2414

Food Shop
1409 Bessemer Rd, Birmingham, AL (4.64 miles away) 205-923-0204

Oriental Market
2721 Green Springs Hwy, Birmingham, AL (4.68 miles away) 205-290-0303

Western Supermarkets
2614 19th St S, Birmingham, AL (4.68 miles away) 205-879-3471

Super Oriental Market
243 W Valley Ave, Homewood, AL (4.73 miles) 205-945-9558
Las Americas
235 W Valley Ave, Homewood, AL (4.75 miles) 205-945-1639

Matt's Market
1416 Spaulding Ishkooda Rd, Birmingham, AL (4.77 miles away) 205-942-3944

Food World
216 Green Springs Hwy, Birmingham, AL (4.80 miles away) 205-942-0595

Lapasadita
195 W Valley Ave # E, Homewood, AL (4.84 miles away) 205-942-8533

Central Park Food Ctr
5728 Avenue O, Birmingham, AL (4.84 miles away) 205-923-6212

Piggly Wiggly
3000 Montgomery Hwy, Birmingham, AL (5.04 miles away) 205-879-5238

Edgemont Town Ctr
411 Green Springs Hwy, Homewood, AL (5.04 miles away) 205-944-1101

Mediterranean Food Market
430 Green Springs Hwy # 6, Birmingham, AL (5.07 miles away) 205-942-1777

Piggly Wiggly
5401 1st Ave N, Birmingham, AL (5.17 miles away) 205-592-8303
Vulcan Mini Mart
2017 18th St SW, Birmingham, AL (5.26 miles away) 205-918-0750

Food Giant
1528 Jackson Blvd, Birmingham, AL (5.28 miles away) 205-841-0207

C C Food Mart-Tarrant
1601 Pinson Valley Pkwy, Birmingham, AL (5.29 miles away) 205-841-5090

Piggly Wiggly
93 Euclid Ave, Birmingham, AL (5.40 miles away) 205-870-5640

Western Supermarkets

2717 Culver Rd, Mountain Brook, AL (5.47 miles away) 205-879-1746
Four Way Food Store
2800 Cherry Ave, Birmingham, AL (5.49 miles) 205-674-0947

Vineyard Food Market
5522 Crestwood Blvd, Birmingham, AL (5.50 miles away) 205-595-1119

Tarrant Foodmart
1103 Bethel Ave, Birmingham, AL (5.58 miles) 205-841-6956

Food Fair
2096 Springdale Ln, Birmingham, AL (5.77 miles away) 205-849-8110

Food Fair
6501 1st Ave N, Birmingham, AL (5.97 miles away) 205-595-1240

Bruno's Food & Pharmacy
126 Wildwood Pkwy, Birmingham, AL (5.99 miles away) 205-941-1532

Patton Grocery
2901 John Bryan Rd, Birmingham, AL (6.05 miles away) 205-925-0690

Bruno's Swiss Pastry
531 Brookwood Vlg, Birmingham, AL (6.06 miles away) 205-871-2800

Wal-Mart Supercenter
209 Lakeshore Pkwy, Homewood, AL (6.14 miles away) 205-945-8692

Piggly Wiggly
32 Phillips Dr, Midfield, AL (6.19 miles away) 205-923-1787

Food World
7100 Aaron Aronov Dr, Fairfield, AL (6.34 miles away) 205-785-2188

Malone Grocery
272 Springdale Rd, Birmingham, AL (6.35 miles) 205-841-5811

Wylam Food's
390 By Williams Sr Dr # D, Birmingham, AL (6.40 miles away) 205-925-9292
Thomas Grocery
4000 Park Ave SW, Birmingham, AL (6.58 miles away) 205-925-3894

Western Supermarkets
7309 Crestwood Blvd, Birmingham, AL (6.66 miles away) 205-592-0400

Eastlake Superette
421 Oporto Madrid Blvd N, Birmingham, AL (6.68 miles away) 205-836-3377

Bruno's Supermarkets Inc
800 Lakeshore Pkwy, Birmingham, AL (6.77 miles away) 205-940-9400

Piggly Wiggly
2121 Southwood Rd, Vestavia Hills, AL (6.77 miles away) 205-824-3551

Bruno's Food & Pharmacy
1533 Montclair Rd, Birmingham, AL (6.87 miles away) 205-951-2234

Vacca's Super
7559 Georgia Rd, Birmingham, AL (6.87 miles away) 205-956-4224

Vestavia Hills City Ctr
784 Montgomery Hwy, Birmingham, AL (6.96 miles away) 205-824-6005

Village Market
7737 2nd Ave S, Birmingham, AL (7.04 miles away) 205-833-1525

APPENDIX G: CENSUS BLOCK GROUPS

Table G-1: Block Groups Included in the Primary Market Area (5 Mile Radius)

10730120017	10730036006	10730038033	10730012004	10730042001
10730055002	10730038021	10730051024	10730030014	10730042002
10730055001	10730057016	10730051023	10730030013	10730051011
10730004005	10730143021	10730107062	10730030012	10730050002
10730124022	10730129011	10730107061	10730030023	10730008006
10730124011	10730144041	10730038032	10730040005	10730008007
10730008002	10730144042	10730057021	10730040004	10730016005
10730124021	10730035002	10730130022	10730040001	10730015001
10730008003	10730034003	10730057022	10730030021	10730015003
10730008001	10730012001	10730131001	10730030022	10730015002
10730008004	10730014001	10730057024	10730107022	10730015004
10730011006	10730014003	10730057015	10730107021	10730008005
10730007004	10730014002	10730036002	10730107015	10730016008
10730007003	10730029001	10730057023	10730107023	10730007005
10730007001	10730029003	10730052003	10730107043	10730047011
10730005003	10730029002	10730130021	10730107052	10730047012
10730005004	10730029004	10730052002	10730107048	10730047013
10730005006	10730042003	10730052004	10730107051	10730045002
10730005007	10730049001	10730011001	10730107031	10730048001
10730024001	10730039001	10730011003	10730007002	10730048002
10730024003	10730049008	10730012002	10730016004	10730024006
10730024004	10730051012	10730012005	10730024002	10730005001
10730047021	10730052001	10730012003	10730016002	10730016001
10730047022	10730050003	10730030011	10730016006	10730023068
10730047023	10730038035	10730031001	10730027003	10730005005
10730108013	10730040002	10730031002	10730027004	10730109007
10730107032	10730038031	10730031003	10730015005	10730124013
10730125001	10730038024	10730033001	10730027002	10730120024
10730011005	10730051021	10730032001	10730024005	10730120023
10730033002	10730036003	10730031005	10730027005	10730120016
10730034001	10730036001	10730031004	10730045001	10730055003
10730034002	10730040003	10730032002	10730045003	10730004004
10730034004	10730051022	10730037001	10730045004	10730004002
10730037004	10730058009	10730037002	10730049004	
10730036004	10730038023	10730037003	10730027001	
10730038022	10730050005	10730011002	10730027006	
10730036005	10730038034	10730011004	10730027007	

Table G-2: Block Groups Included in the Secondary Market Area (10 Mile Radius)

10730123021	10730033002	10730136017	10730036001	10730030023
10730120017	10730034001	10730136015	10730040003	10730040005
10730055002	10730034002	10730136016	10730051022	10730040004
10730126023	10730034004	10730136013	10730058009	10730040001
10730124023	10730037004	10730133001	10730038023	10730030021
10730055001	10730036004	10730105001	10730050005	10730030022
10730004005	10730038022	10730106024	10730038034	10730107022
10730125006	10730036005	10730106025	10730038033	10730107021
10730124022	10730036006	10730106027	10730051024	10730107015
10730124011	10730038021	10730106026	10730051023	10730107023
10730008002	10730132001	10730106037	10730107062	10730107043
10730124032	10730057016	10730125003	10730107061	10730107052
10730124021	10730132002	10730125002	10730038032	10730107048
10730008003	10730143021	10730035001	10730057021	10730107051
10730020003	10730129011	10730035003	10730130022	10730107031
10730127011	10730132003	10730035002	10730057022	10730007002
10730125005	10730138011	10730034003	10730131001	10730016004
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Alabama BUY FRESH BUY LOCAL Farmers Market Authority

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