

The Flea Market at Eastern Market Visitors Survey

Prepared for:



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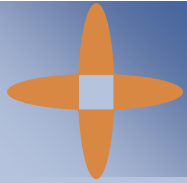
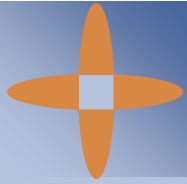


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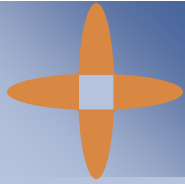
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Background & Objectives

The Flea Market at Eastern Market has been in operation for 29 years. It hosts up to 200 vendors from five different continents and thousands of visitors from Washington, DC, the greater metropolitan area and beyond. For visitors, the Flea Market serves as both a primary and secondary destination for visits to Washington, DC. For vendors, the Flea Market can be a source of revenue and has also served as an incubator for a variety of entrepreneurs that now have full-time “brick and mortar” businesses in the city.

The Flea Market operates inside the Hine School yard, much of which is now being considered for development. This development may result in greatly reducing the size of the Flea Market, if not closing it completely. In order to determine what economic impact a reduction in size or elimination of the Flea Market would have, the Flea Market at Eastern Market and their consultant, Owens Economics, commissioned a third-party market research firm – WB&A Market Research – to conduct a study among visitors to the Market. The overall purpose of this study was to determine how much money visitors spend in Washington on days they visit the market, both at the market itself and within the city as a result of their visit. Other objectives included determining the importance of the Market in visitors’ trips to the City and learning more about who visits the Market.



Methodology

A total of 435 surveys were conducted by WB&A's professional interviewers among visitors to the Flea Market on Sunday, May 27th and Sunday, June 3rd. Visitors were intercepted at the entrances of the Flea Market. Interviewers read the questions to them and marked their responses. The number of surveys completed by residents of Washington, D.C. was limited to ensure that visitors from other areas were adequately represented. The data were then weighted to represent the number of visitors present from each region each Sunday. The number of completed surveys by area of residency is as follows:

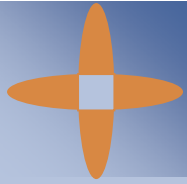
Area of Residency	
Washington, D.C.	170
Metro Area	188
Outside Metro Area	77
Total	435

Results were coded and tabulated by WB&A. Where distinctions are drawn by region, residency is based on a strict definition of the area. Washington, D.C. includes only residents of the District. The Metro area includes residents of the Washington, D.C. MSA, but excludes those living in the District. All locations outside of the DC MSA have been defined as "Outside Metro Area." The results of the research are as follows.

Standard Error of the Data

	40%	30%	20%	10%	1%	
	or	or	or	or	or	
If the percentage found is around:	50%	60%	70%	80%	90%	99%
Then, the standard error in percentage points for a total sample of n = 435 is:	±4.7	±4.6	±4.3	±3.8	±2.8	±0.9

For example, if a question yielded a percentage of 20%, then we can be sure 95 out of 100 times that the true percentage would lie between 16.2% and 23.8% (20% ±3.8 percentage points).



Key Findings

Today's Trip

Of visitors who were not Washington, D.C. residents, the majority (89%) were drawn to visit Washington, D.C. in part by the Flea Market. In fact, more than one-half (57%) said that it was either a primary reason or the only reason for their visit.

The majority of visitors mentioned purchasing art, antiques, or jewelry as a primary purpose for visiting the Flea Market (69%).

Spending

A typical visitor spent an average of \$72 at the Flea Market on the day they were surveyed. A typical visitor from outside the Metro area (15% of all visitors) spent the most money on average, about \$81.

In addition to what they spent at the Flea Market, visitors spent on average an *additional* \$73 in Washington, D.C., including about \$41 on food and \$17 on merchandise.

- The typical visitor from outside the Metro Area spent \$141 in Washington, D.C. on that day, significantly more than the average D.C. resident.

Of what they spent in Washington, D.C. on the day of their visit, visitors spent on average \$35 in the Eastern Market area (includes Barracks Row, 7th Street, and Capitol Hill), which includes \$21 on food and \$10 on merchandise.

The average spending in both the Flea Market and Washington, D.C. as a whole was about \$145 for the typical visitor, with the majority being spent on merchandise (\$67) and food (\$60).

- The typical visitor from outside the Metro area spent about twice the average (\$220), while the average visitor from the Metro area spent \$117.

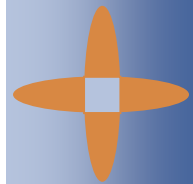
Past Visits

The average visitor has visited the Flea Market about 16 times in the past year. On average, visitors typically spend about \$155 in Washington, D.C. and at the Flea Market each day per trip.

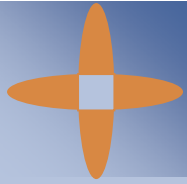
Future Visits

Almost two-third of visitors (65%) said they would visit the Flea Market much less frequently or not at all if goods like art, antiques, or jewelry were no longer available.

- The majority of visitors said they would not purchase these products in Washington, D.C. if they were no longer available at the Flea Market, either because they would purchase them outside Washington, D.C. (27%) or because they would not purchase the products at all (55%).



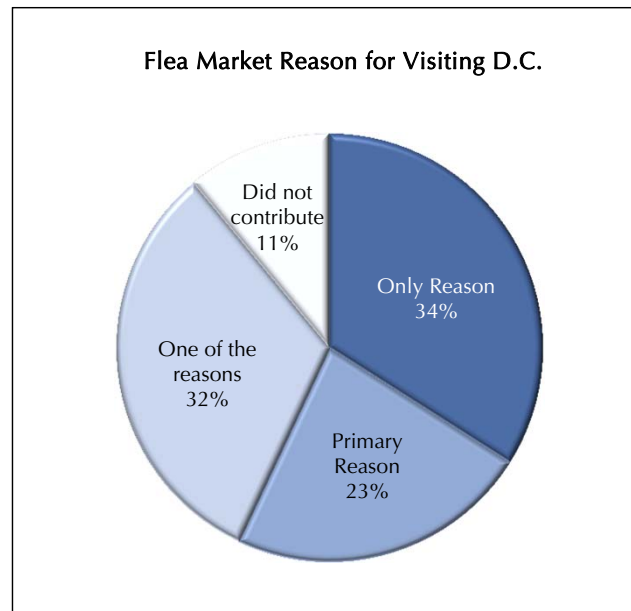
Detailed Findings



Today's Visit

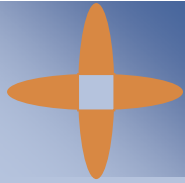
Of visitors who were not Washington, D.C. residents, the majority (89%) were drawn to visit Washington, D.C. in part by the Flea Market. In fact, more than one-half (57%) said that it was either a primary reason or the only reason for their visit.

- The Flea Market was a greater draw for those from the Metro area, with 73% saying it was a main reason for their visit.



Q3. How important was the Flea Market in your decision to visit Washington, D.C. today?

Base = Non-D.C. residents and answering (n=256)



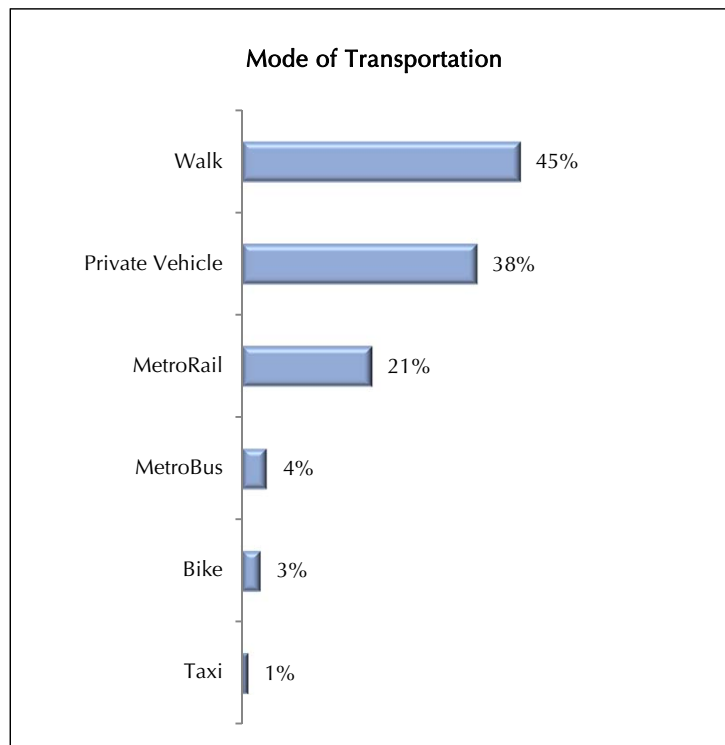
Today's Visit (continued)

Visitors to the Flea Market most often walked or rode in a private vehicle. Almost one in four used some form of public transportation to get to the Flea Market (24%).

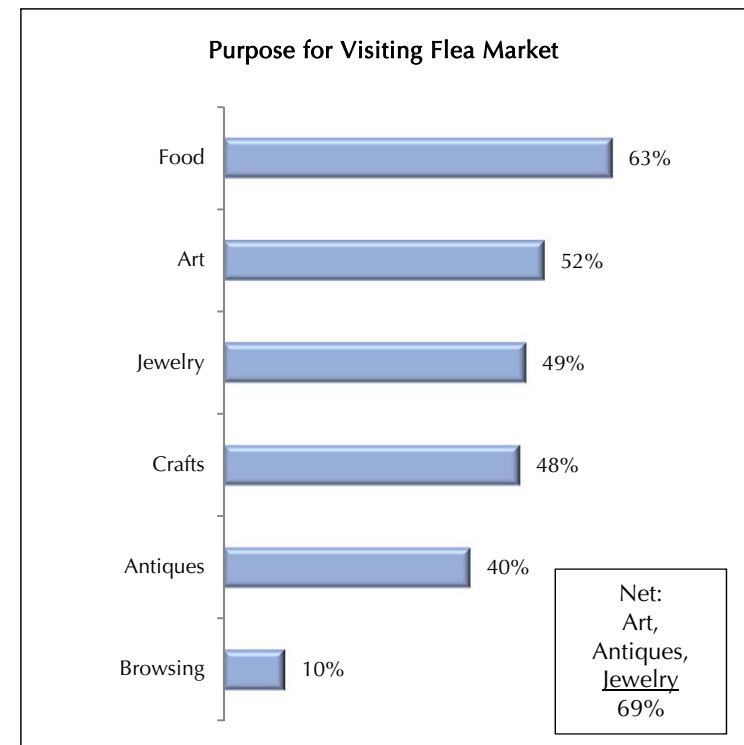
- Visitors from outside the Metro area were more likely than any other group to pay for transportation (42% vs. 20% for D.C. residents and 27% for Metro area residents), with 38% using MetroRail or MetroBus.

The majority of visitors mentioned purchasing art, antiques, or jewelry as a primary purpose for visiting the Flea Market (69%). Slightly fewer mentioned purchasing food (63%) as the purpose of their visit.

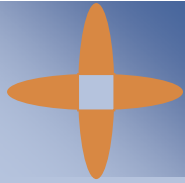
- Notably, the vast majority of visitors (89%) mentioned making a purchase of some kind as their reason for visiting the Flea Market, with only one in ten (10%) saying they were just browsing or enjoying the atmosphere.



Q5. How did you get to the Flea Market today?
Base = Those answering (n=433)
Multiple responses accepted



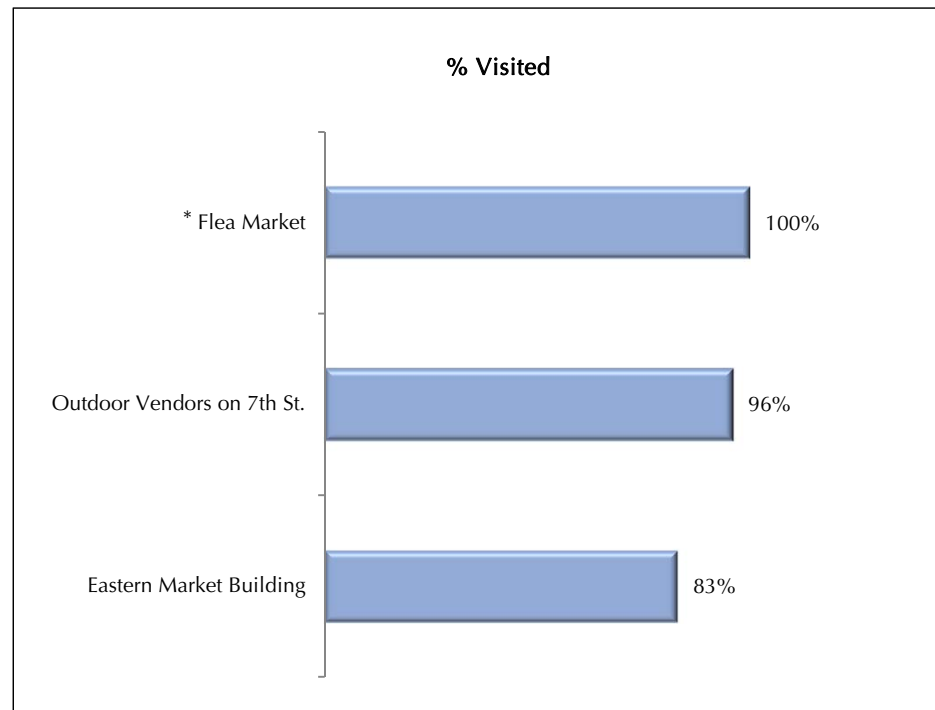
Q6. What was your primary purpose for coming to the Flea Market today?
Base = Those answering (n=427)
Multiple responses accepted, Top mentions



Today's Visit (continued)

The vast majority of visitors surveyed had visited the outdoor vendors along 7th Street (96%), in addition to visiting the Flea Market where they were interviewed.

- Slightly less (83%) had visited the vendors in the Eastern Market building.

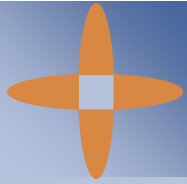


Q7. While at Eastern Market today, did you visit ... ?

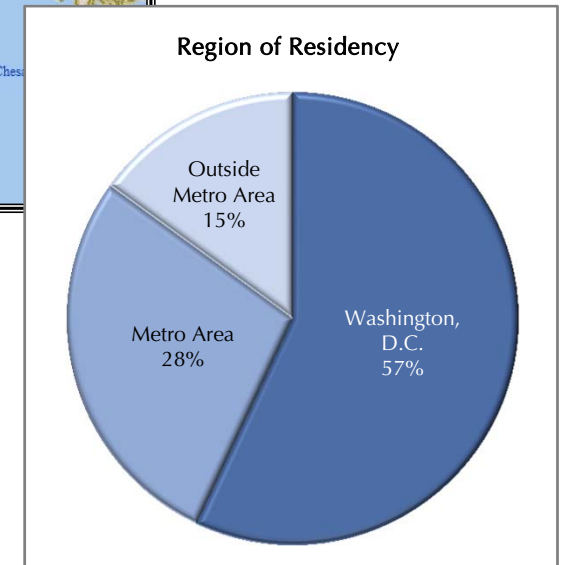
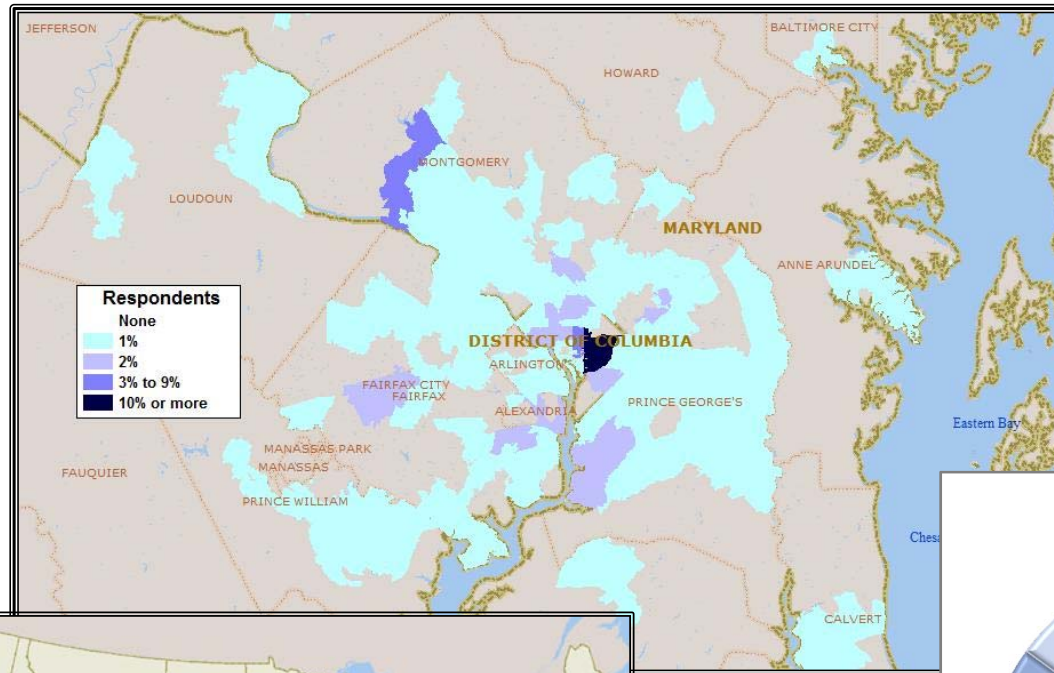
Base = Those answering (n=434)

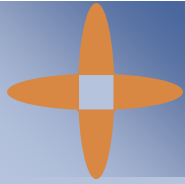
Multiple responses accepted

*Note: Only respondents who visited the Flea Market were interviewed



Today's Visit (continued)

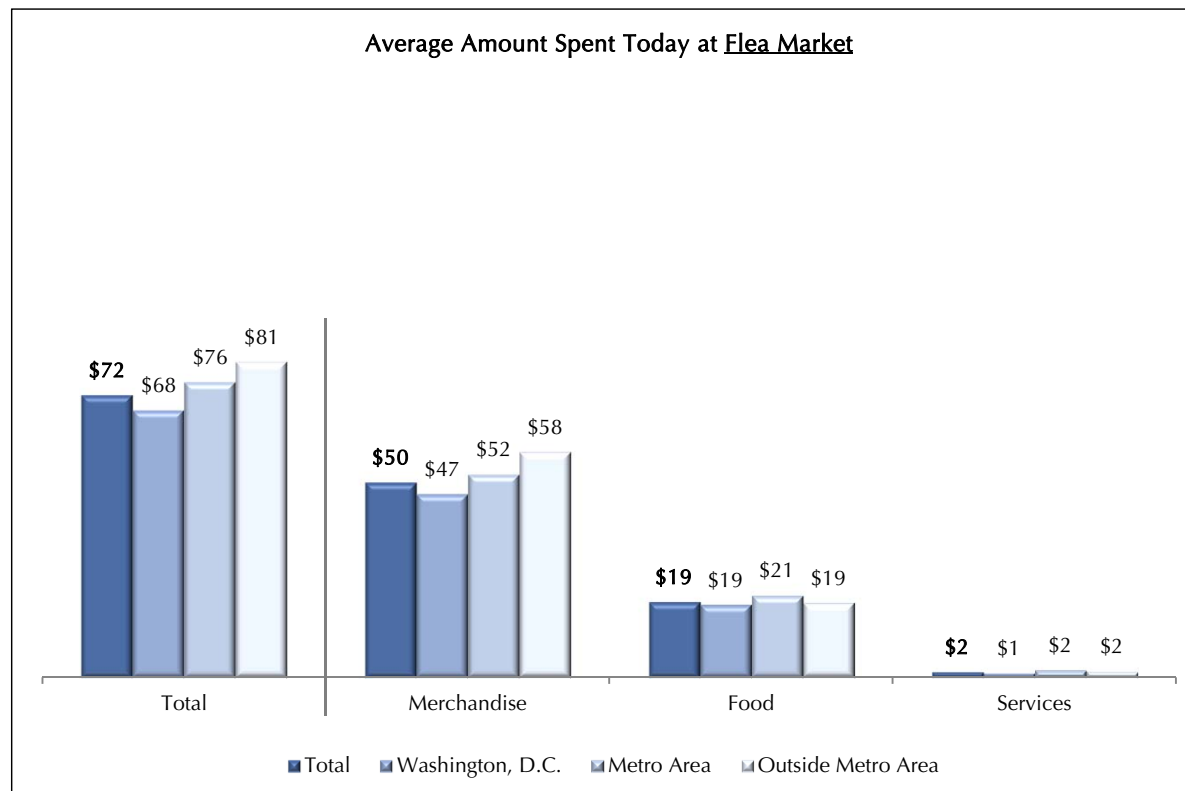




Spending

A typical visitor from outside the Metro area (15% of all visitors) spent the most on average at the Flea Market on the day they were surveyed, spending on average \$81. The average visitor from Washington, D.C. (57% of all visitors) spent the least (\$68).

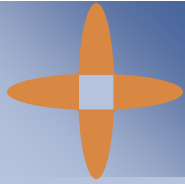
- The difference in spending was driven largely by merchandise, which visitors from outside the Metro area spent an average of \$11 more on than D.C. residents, with Metro area residents falling in between.
- Visitors spent the most on merchandise, with the average visitor spending \$50 that day. Visitors also spent an average of \$19 on food.



Q8. Please tell me how much you expect (you/your party) will spend today at the Flea Market on ... ?

Base = Those answering (n=430-431)

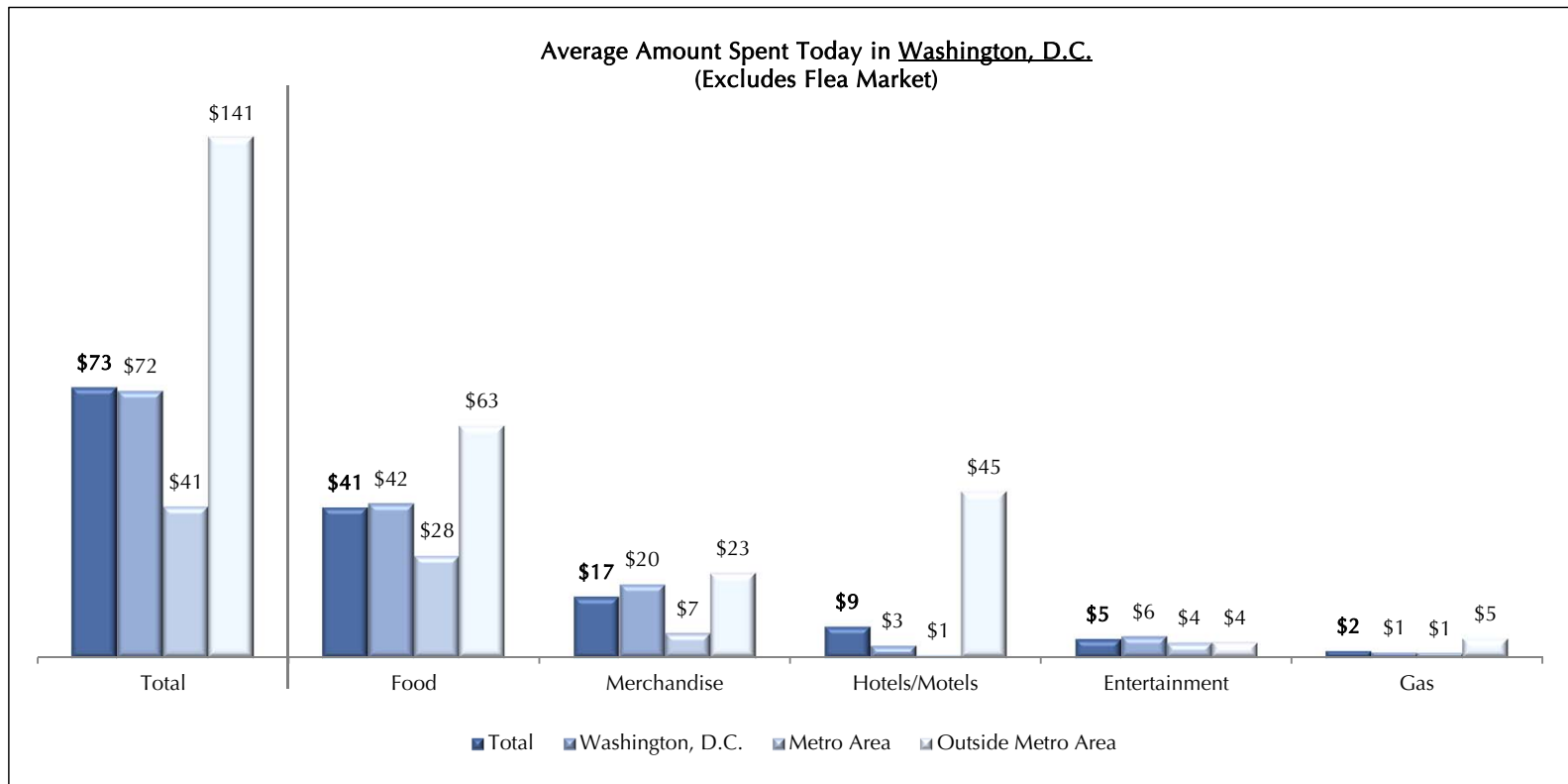
Top Mentions



Spending (continued)

In addition to what they spent at the Flea Market, visitors spent on average an additional \$73 in Washington, D.C., including about \$41 on food and \$17 on merchandise.

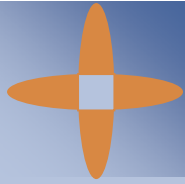
- The typical visitor from outside the Metro Area spent \$141 in Washington, D.C. on that day, significantly more than D.C. residents. Though some of their spending went towards hotels or motels, they also spent more on food (\$63) and merchandise (\$23) than the average D.C. resident.
- The average visitor from the Metro area spent somewhat less than the typical Flea Market visitor (\$41), with less spending on both food (\$28) and merchandise (\$7) than the average.



Q9. Not including what you will spend today at the Flea Market, please tell me how much you expect (you/your party) will spend today in Washington, D.C. on... ?

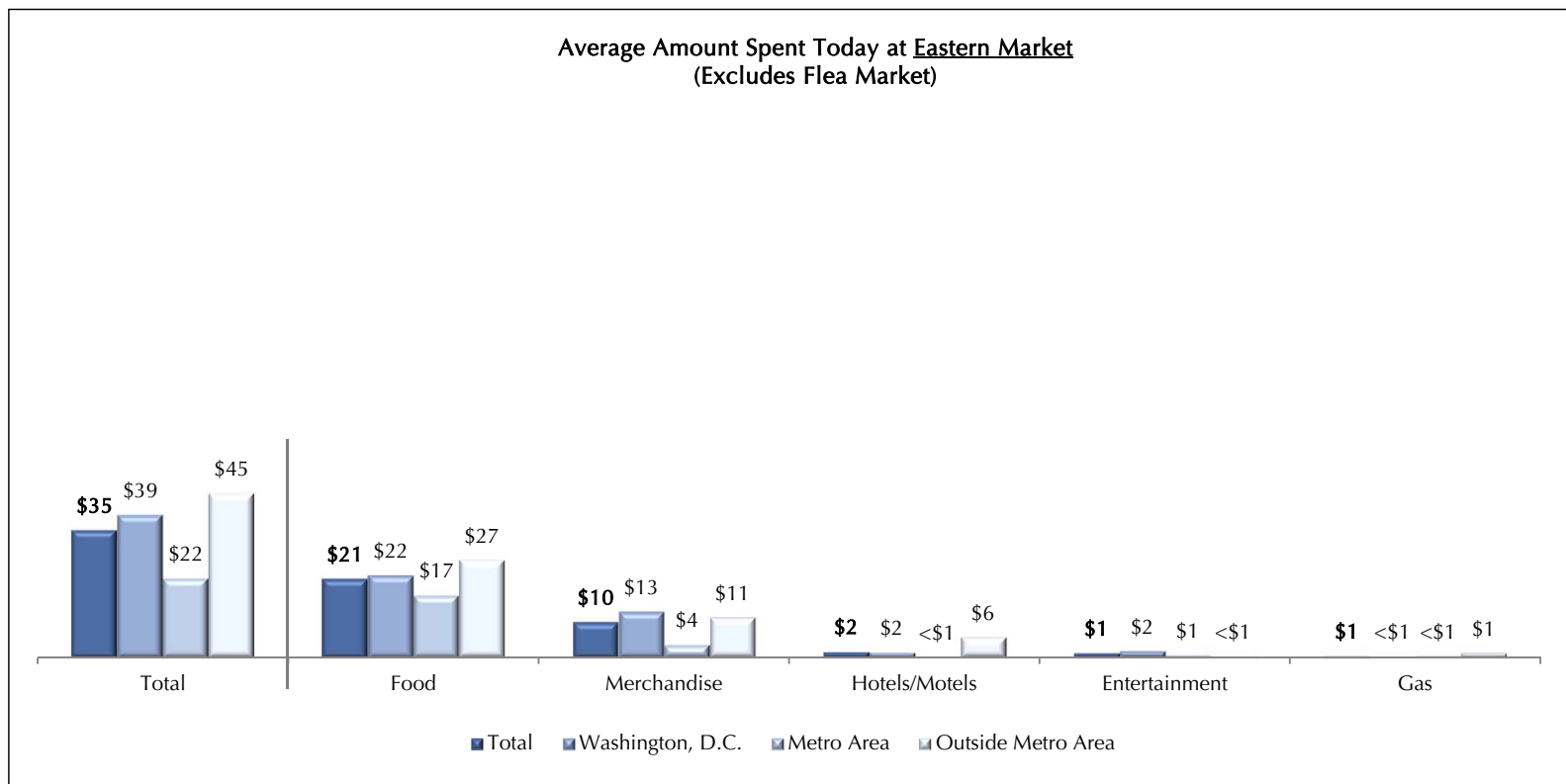
Base = Those answering (n=432)

Top Mentions



Spending (continued)

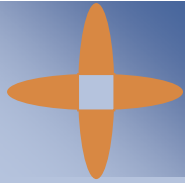
Of what they spent in Washington, D.C. on the day of their visit, visitors spent on average \$35 in the Eastern Market area (includes Barracks Row, 7th Street, and Capitol Hill), which includes \$21 on food and \$10 on merchandise.



Q9. Not including what you will spend today at the Flea Market, please tell me how much you expect (you/your party) will spend today in Washington, D.C. on ... ?
Q10. What percent of your spending today in Washington, D.C. do you expect (you/your party) will spend specifically in the Eastern Market area on each of the following?

Base = Those answering (n=427-432)

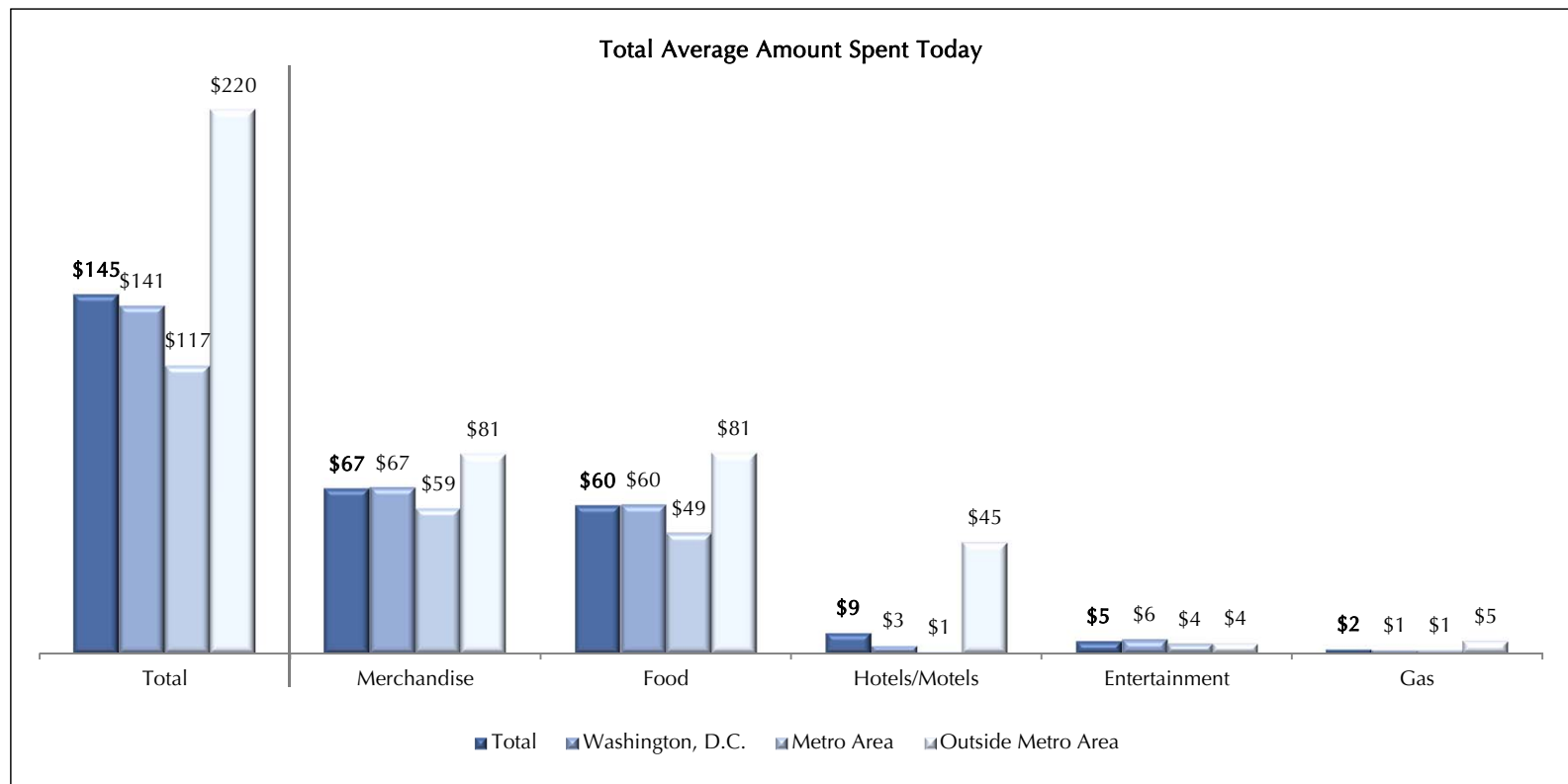
Top Mentions



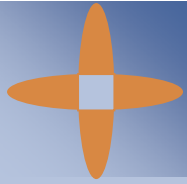
Spending (continued)

The average spending in both the Flea Market and Washington, D.C. as a whole was about \$145 for the typical visitor, with the majority being spent on merchandise (\$67) and food (\$60).

- The typical visitor from outside the Metro area spent about twice the average (\$220), while the typical visitor from the Metro area spent \$117.



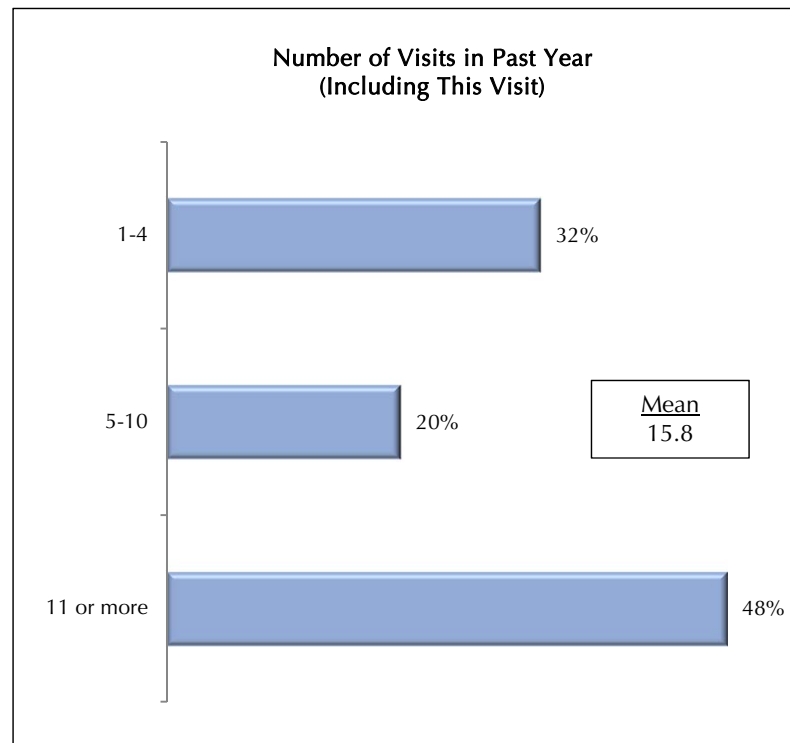
Q8. Please tell me how much you expect (you/your party) will spend today at the Flea market on ... ?/Q9. Not including what you will spend today at the Flea Market, please tell me how much you expect (you/your party) will spend today in Washington, D.C. ... ?
Base = Those answering (n=430-433)
Top Mentions



Past Visits

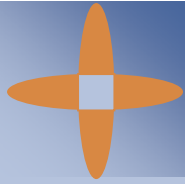
Almost one-half of the visitors have visited the Flea Market 11 or more times in the past year, with the average number of visits being about 16.

- Not surprisingly, D.C. residents reported the highest average number of visits (21), followed by Metro area residents (12). Those from outside the Metro area reported an average of 4 visits per year.



Q11. In the past year, how many times have you visited the Flea Market, or is this your first visit?

Base = Those answering (n=418)

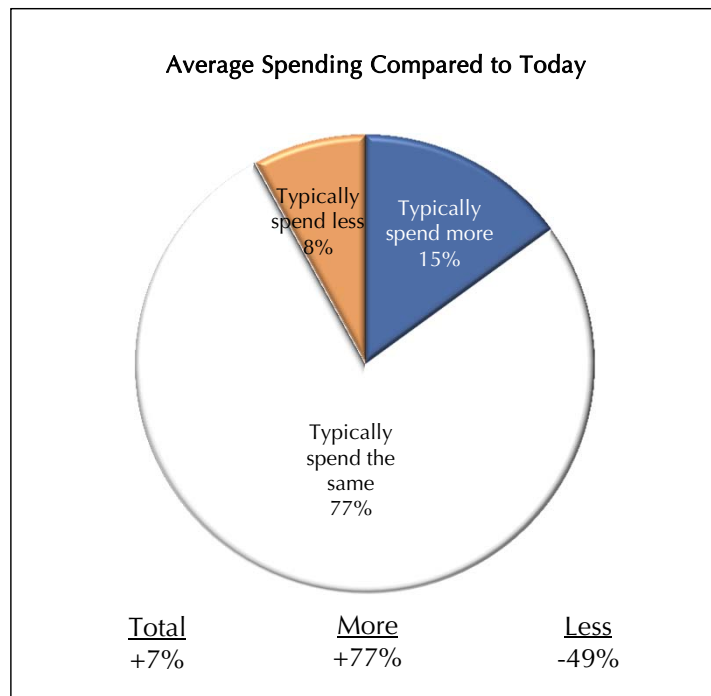


Past Visits (continued)

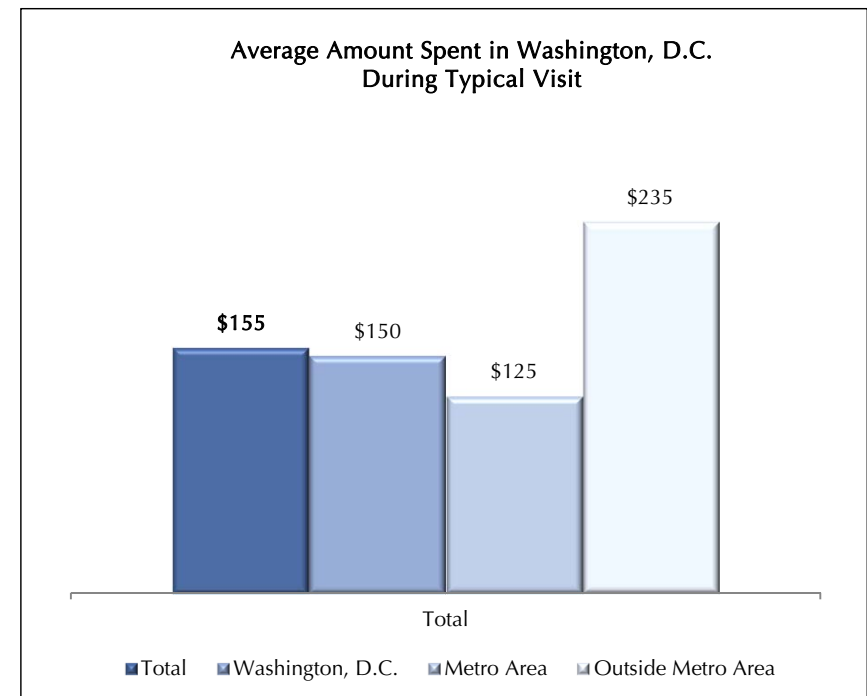
The majority of visitors who had previously visited the Flea Market reported that their spending at the Flea Market and in Washington, D.C. on the day they were surveyed was reflective of what they typically spend.

- However, about one in seven reported that they typically spend an average of 77% more on their visits. Only 8% of visitors said that they typically spend less than they would on this visit.

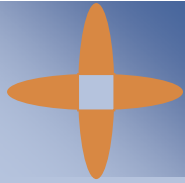
On average, visitors typically spend about \$155 in Washington, D.C. and at the Flea Market per trip.



Q12. On those visits, did you typically spend more, about the same, or less in Washington, D.C. and at the Flea Market as you will spend during this visit?/Q13. About what percent more/less did you typically spend?
Base = Those who have previously visited and answering (n=335)



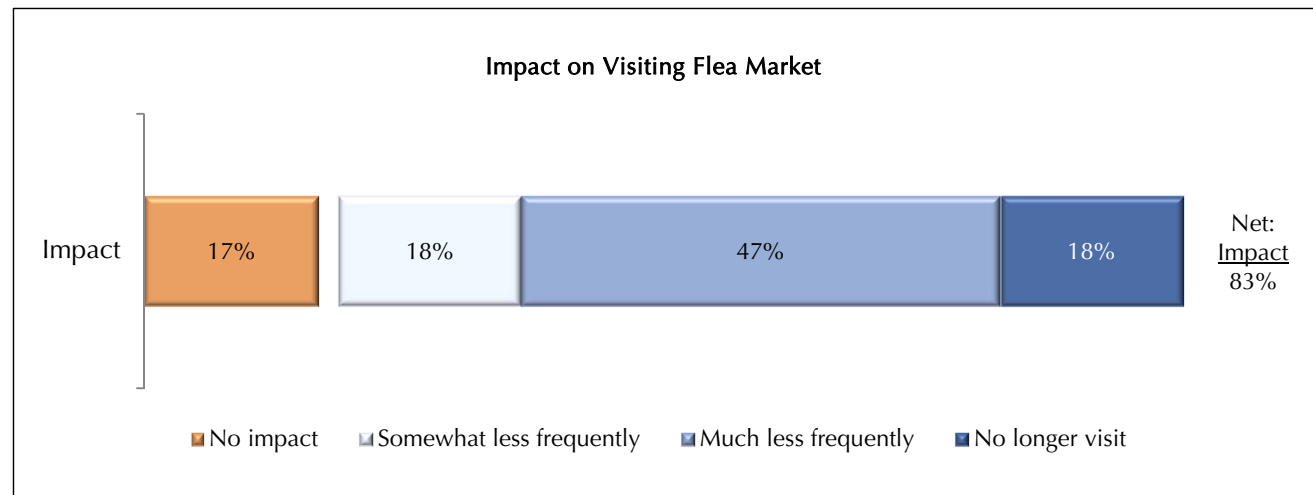
Q8. Please tell me how much you expect (you/your party) will spend today at the Flea market on ... ?/Q9. Not including what you will spend today at the Flea Market, please tell me how much you expect (you/your party) will spend today in Washington, D.C. ... ?/Q13. About what percent more/less did you typically spend?
Base = Those answering (n=430-433)



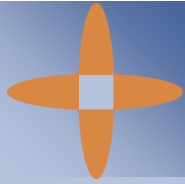
Future Visits

Notably, the majority of visitors reported that if the merchandise sold on the Flea Market school grounds were no longer available, they would visit the Flea Market less frequently. In fact, almost two-third of visitors (65%) said they would visit much less frequently or not at all.

- Almost one in five (18%) said they would no longer visit the Flea Market if these goods were no longer available there.

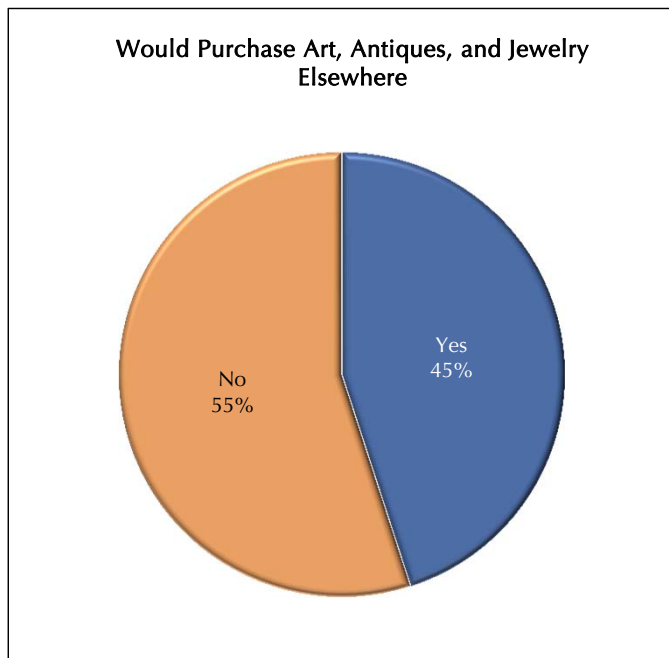


Q14. If the merchandise currently sold on the school grounds, such as art, antiques, and jewelry, were not available, how would that impact your decision to visit the Flea Market?
Base = Those answering (n=427)

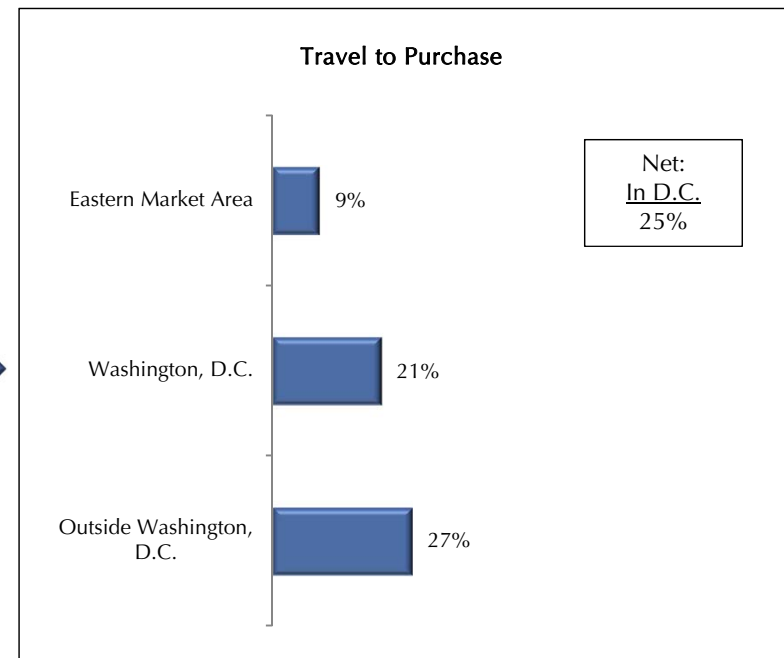


Future Visits (continued)

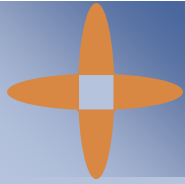
The majority of visitors said they would not purchase arts, antiques, and jewelry in Washington, D.C. if they were no longer available at the Flea Market, either because they would purchase them outside Washington, D.C. (27%) or because they would not purchase the products at all (55%).



Q15. If art, antiques, and jewelry were not available at the Flea Market, would you travel somewhere else to purchase these types of items?
Base = Those answering (n=390)



Q16. Where would you travel to purchase these types of items?
Base = Those answering (n=385)
Multiple responses accepted



Visitor Profile

Demographics	
Gender	<i>n=</i> (431)
Female	69%
Male	31
Age¹	<i>n=</i> (435)
18-24	13%
25-34	34
35-44	19
45-54	16
55-64	15
65 or older	4
<i>Mean</i>	39.7
<i>Median</i>	36.6
Region of Residency¹	<i>n=</i> (435)
Washington, D.C.	57%
Metro Area	28
Outside Metro Area	15
Party Size (mean)	2.2
Parties with Children	12%
# of Children in Party (mean) ²	1.5

Base = Those answering

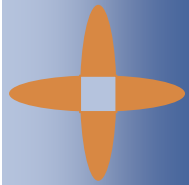
¹Base = Total sample

²Base = Those with children and answering

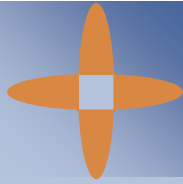
Demographics	
Race/Ethnicity³	<i>n=</i> (424)
White	70%
Black or African-American	25
Hispanic/Latino	6
Asian	5
American Indian or Alaskan Native	1
Native Hawaiian or other Pacific Islander	1
Middle-Eastern	<1
Other	1
Income	<i>n=</i> (406)
Less than \$15,000	7%
\$15,000 to less than \$25,000	2
\$25,000 to less than \$35,000	5
\$35,000 to less than \$50,000	18
\$50,000 to less than \$75,000	16
\$75,000 to less than \$100,000	15
\$100,000 to less than \$125,000	12
\$125,000 to less than \$150,000	10
\$150,000 or more	16
<i>Mean</i>	\$98,850
<i>Median</i>	\$78,900

Base = Those answering

³Multiple responses accepted



Appendix



Questionnaire (continued)

Q9. Not including what you will spend today at the Flea Market, please tell me how much you expect (you/your party) will spend today in Washington, D.C. [READ LIST] (USE 9998 FOR DON'T KNOW/REFUSED.)

	Amount
a. At restaurants and on food	\$
b. On merchandise	\$
c. On attractions or entertainment	\$
d. At hotels or motels	\$
e. On gas	\$
f. Anything else (Specify):	\$
	\$
	\$

ASK a-f ONLY IF THEIR RESPONSE WAS GREATER THAN 0 IN Q9.

Q10. What percent of your spending today in Washington, D.C. do you expect (you/your party) will spend specifically in the Eastern Market area (includes Capitol Hill, Barracks Row, and 7th Street) on each of the following? (READ LIST) (RANDOMIZE. ACCEPT 0 – 100, USE 9998 FOR DON'T KNOW/REFUSED. DO NOT ACCEPT RANGES.)

	Percent
a. At restaurants and on food	%
b. On merchandise	%
c. On attractions or entertainment	%
d. At hotels or motels	%
e. On gas	%
f. Anything else (Specify):	%
	%
	%

ASK EVERYONE

Q11. In the past year, how many times have you visited the Flea Market, or is this your first visit? _____

- ₉₇ First visit ₉₈ Don't know/Refused

ASK Q12 ONLY IF NOT A FIRST-TIME VISITOR [Q11 NOT (97)]. Q11(97) SKIP TO Q14.

Q12. On those visits, did you typically spend more, about the same, or less in Washington, D.C. and at the Flea Market as you will spend during this visit?

- ₀₁ More ₀₂ Same ₀₃ Less ₉₈ DO NOT READ: Don't know/Refused

ASK Q13 ONLY OF THOSE THAT SPEND MORE/LESS [Q12 (01,03)]. Q12(02,98) SKIP TO Q14.

Q13. About what percent (more/less) did you typically spend? _____% ₉₈ DO NOT READ: Don't know/Refused

ASK EVERYONE

Q14. If the merchandise currently sold on the school grounds, such as art, antiques, and jewelry, were not available, how would that impact your decision to visit the Flea Market? Would you say you would...

- ₀₁ No longer visit, ₀₄ It would have no impact?
 ₀₂ Visit much less frequently, ₉₈ DO NOT READ: Don't know/Refused
 ₀₃ Visit somewhat less frequently, or

Q15. If art, antiques, and jewelry were not available at the Flea Market, would you travel somewhere else to purchase these types of items?

- ₀₁ Yes ₀₂ No ₉₈ Don't know/Refused

ASK Q16 ONLY IF WOULD TRAVEL SOMEWHERE ELSE [Q15(01)]. Q15(02,98) SKIP TO Q17.

Q16. Where would you travel to purchase these types of items? Would you go to... (ACCEPT MULTIPLE RESPONSES)

- ₀₁ Another location in the Eastern Market area,
 ₀₂ Elsewhere in Washington, D.C., or
 ₀₃ Elsewhere outside of Washington, D.C.?
 ₉₈ DO NOT READ: Don't know/Refused

TELL EVERYONE: "The final few questions are for classification purposes only."

Q17. What is your home zip code? _____

- ₉₇ Outside the U.S. ₉₈ Refused

Q18. [RECORD, DO NOT ASK] Gender:

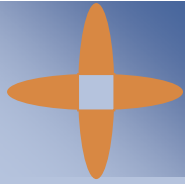
- ₀₁ Male ₀₂ Female

Q19. Are you Hispanic or Latino?

- ₀₁ Yes ₀₂ No ₉₈ DO NOT READ: Refused

Q20. What is your race? Are you... (READ LIST)

- ₀₁ American Indian or Alaskan Native,
 ₀₂ Asian,
 ₀₃ Black or African-American,
 ₀₄ Native Hawaiian or Other Pacific Islander,
 ₀₅ White,



Questionnaire (continued)

Q21. What was your annual household income for 2011? Was it...

<input type="checkbox"/> ₀₁ Less than \$15,000,	<input type="checkbox"/> ₀₆ \$75,000 to less than \$100,000,
<input type="checkbox"/> ₀₂ \$15,000 to less than \$25,000,	<input type="checkbox"/> ₀₇ \$100,000 to less than \$125,000,
<input type="checkbox"/> ₀₃ \$25,000 to less than \$35,000,	<input type="checkbox"/> ₀₈ \$125,000 to less than \$150,000, or
<input type="checkbox"/> ₀₄ \$35,000 to less than \$50,000,	<input type="checkbox"/> ₀₉ \$150,000 or more?
<input type="checkbox"/> ₀₅ \$50,000 to less than \$75,000,	<input type="checkbox"/> ₉₈ DO NOT READ: Refused

Q22. Do you have anything else about the Flea Market at Eastern Market you would like to add? _____

Thank you for your time.