



GROCERY STORE NEEDS ASSESSMENT

Tukwila International Boulevard Neighborhood

ABSTRACT

This report contains the research process of the City of Tukwila's Grocery Store Project. It presents findings, and offers recommendations for growth of both the City's main grocery store and the City's food system.

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Executive Summary

The City of Tukwila initiated the Grocery Store Project in June of 2014, aiming at bringing a wide variety of healthy food options to the community. Junpei Guo, Economic Development Intern with the City, served as the project manager from June to December 2014, and composed this final report to summarize the six-month process, as well as discuss next steps.

The City's purpose for completing a grocery store analysis was to ensure that a quality, full-service grocery store would be able to sustainably operate near the intersection of Tukwila International Boulevard and South 144th Street, the current location of Saar's Super Saver Foods.

This project had four main goals:

- Identify food demand of Tukwila residents;
- Evaluate the strengths, weaknesses, and opportunities of existing local grocery stores, especially Saar's Super Saver Foods, to better serve the neighborhood;
- Develop recommendations to improve the sustainability of Saar's Super Saver Foods; and
- Develop supplemental food business models to ensure food access of the community.

In order to achieve these goals, we conducted thorough primary and secondary research regarding the current food environment in Tukwila, the wants and needs of Tukwila residents, as well as their expectations towards local grocery stores. Our methodologies included literature review, a neighborhood survey, Saar's in-store survey, and focus groups. We have gathered a large amount of community input, and generated valuable findings and recommendations for both the City and Saar's Super Saver Foods.

Primary research findings include:

- The majority of Saar's customer base has lower household income.
- Saar's gained its reputation by offering wide ethnic food selections, attracting customers from local as well as surrounding cities.
- There is room for Saar's to improve its food quality, store layout, and grocery selections.
- Transportation is not a barrier to grocery shopping for Tukwila residents.

Based upon these findings, we developed set of recommendations for Saar's Super Saver Foods and the City of Tukwila. Priority recommendations are as follows.

For Saar's:

- Examining ways to improve people's perception of their food quality;
- Expanding organic options;
- Renovating store layout; and
- Upgrading parking lot security.

For the City:

- Continue its effort in revitalizing Tukwila International Boulevard;
- Continue building relationship with Saar's, and involve them in more community events; in the future; and
- Help connect Saar's with King County's Kitchen Cabinet Program.

This report also included feasibility analysis of supplemental food business models in Tukwila. Models being analyzed were a farmers market, fresh produce trucks, and corner stores. These models could serve as sources of food for residents who have limited access to large grocery stores or have specific requirements for food.

The Grocery Store Project supplied an assessment of Saar's, the main grocery store in Tukwila, and offered suggestions for improvements based upon comments and suggestions from the community. We hope that Tukwila residents will be able to see how their opinions might have changed the food environment in Tukwila in the near future.

Chapter 1. Introduction

Prior to Saar's Super Saver Foods, there were two other groceries stores operating at 3725 S 144th Street. One of the stores closed due to bankruptcy of the entire chain and another went out of business. Given the importance of maintaining a grocery store in the neighborhood, the City made the decision to do a study to assess methods to ensure a long-term successful grocery store in Tukwila.

This project had three priorities. The goals were to gather and present:

1. Information to help the existing grocery store better understand local customer demand in order to better serve the local neighborhoods.
2. Information supporting the long-term use of the property as a quality, full-service grocery store.
3. Information on supplemental business models that would strengthen the existing food environment and increase sources of healthy food options for Tukwila residents.

These priorities gave us direction for the research process, beginning with the background research of Tukwila.

Background on Tukwila

In this section, we will present findings on the characteristics of the City of Tukwila to provide context regarding the neighborhood.

Demographics

Tukwila is located in south King County, 12 miles south of downtown Seattle and just east of the Seattle-Tacoma International Airport.¹ The 2013 estimate of its population was 19,765, with a total of 7,300 households and an average household size of 2.6. Approximately 60% of the people rent their properties.

Since the first Bosnian refugees resettled in Tukwila in the 1990s, the city has transformed demographically over the past two decades. Somali and Sudanese refugees resettled in the 2000s, and Bhutanese and Nepalese refugees after that.² As of the 2010 census, the neighborhood has persisted in a strong ethnic diversity. The racial composition is shown below. The neighborhood is predominantly White, with the remainder mainly African American and Asian.

¹ "General Information About Tukwila." *General Information About Tukwila*. N.p., n.d. Web. 27 June 2014.

² "Tukwila." *Confronting Suburban Poverty*. N.p., n.d. Web. 16 July 2014.

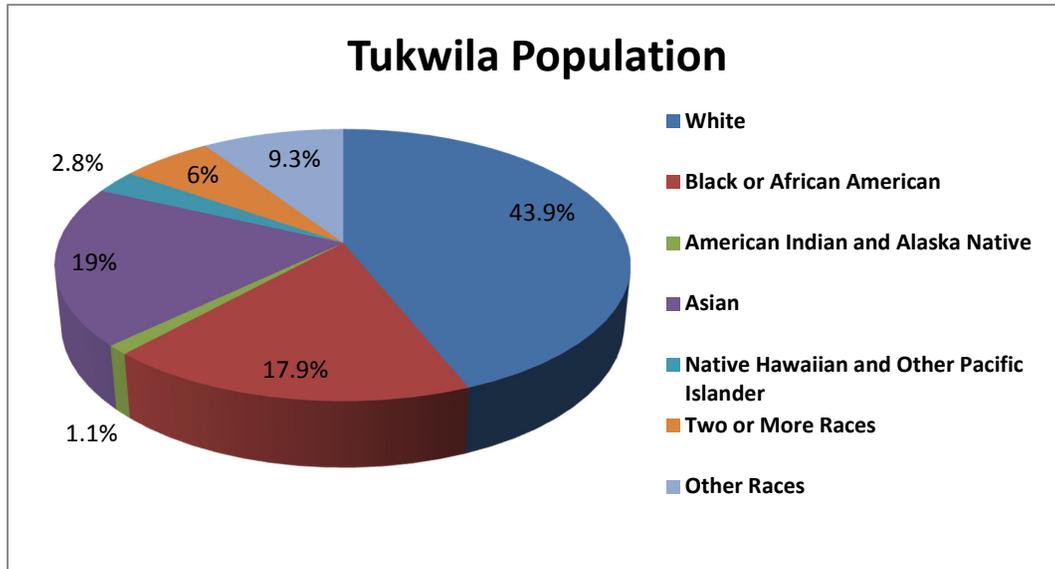


Figure 1. Tukwila population by ethnicity.

Table 1 below summarizes the income level of Tukwila residents; the column chart offers a more straightforward view of it. We can identify from the chart that the low-income population in Tukwila is higher than the Washington average--the city is extremely lacking in high-income groups. Median household income is \$43,333, approximately \$16,000 less than the Washington average \$59,374.

Table 1³. Washington State and Tukwila households income level.

Income and Benefits	Washington State		Tukwila	
	Estimate	Percent	Estimate	Percent
Total households	2,619,995	2,619,995	7,300	7,300
Less than \$10,000	159,121	6.1%	682	9.3%
\$10,000 to \$14,999	111,915	4.3%	348	4.8%
\$15,000 to \$24,999	235,311	9.0%	966	13.2%
\$25,000 to \$34,999	248,228	9.5%	841	11.5%
\$35,000 to \$49,999	352,214	13.4%	1,488	20.4%
\$50,000 to \$74,999	499,007	19.0%	1,544	21.2%
\$75,000 to \$99,999	356,484	13.6%	598	8.2%
\$100,000 to \$149,999	390,195	14.9%	543	7.4%
\$150,000 to \$199,999	143,095	5.5%	204	2.8%
\$200,000 or more	124,425	4.7%	86	1.2%
Median household income (dollars)	59,374	(X)	43,333	(X)
Mean household income (dollars)	77,232	(X)	53,043	(X)

³ "American FactFinder - Results." *American FactFinder - Results*. U.S. Census Bureau, n.d. Web. 30 June 2014

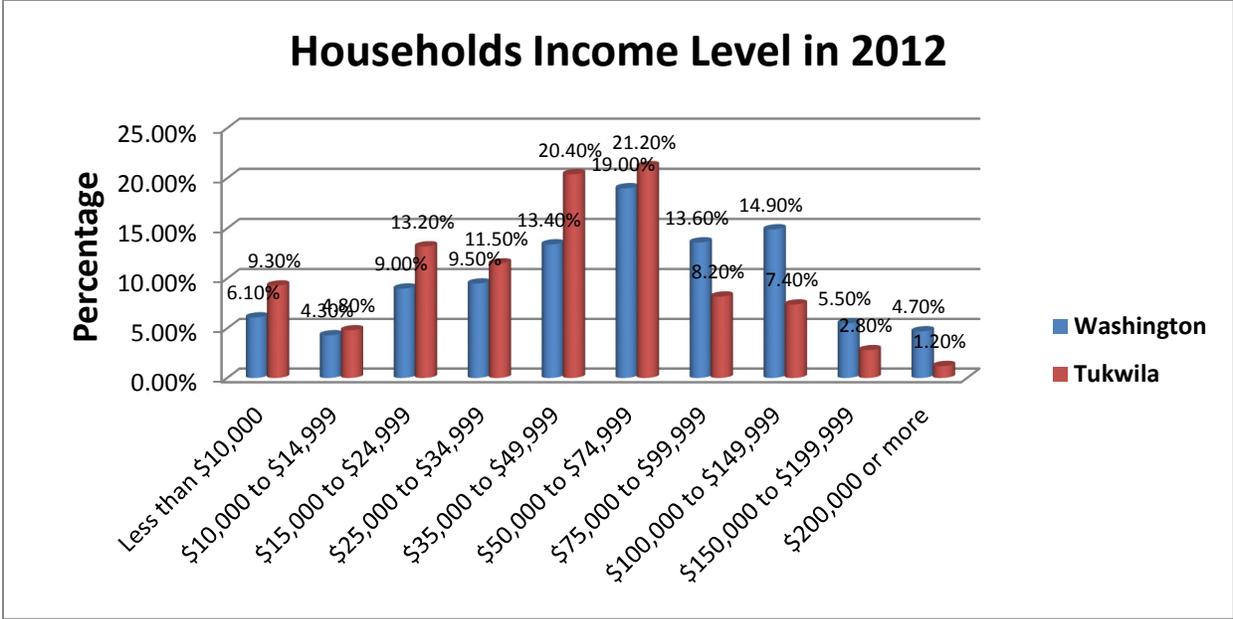
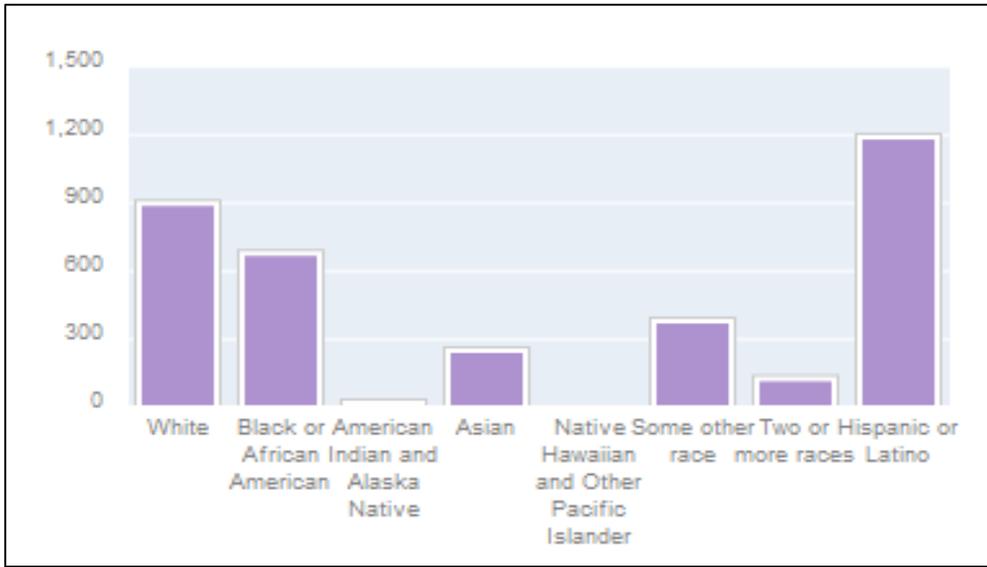


Figure 2. Washington State and Tukwila households income level.

Half of Tukwila’s workers are employed in retail, food service, warehousing, construction and other services. These industries usually include low-paying jobs and were hit hard in the aftermath of the financial crisis in 2008. As of 2009, 20.3% of Tukwila residents have income below the poverty level, greater than the 16.2% of that of the whole state.⁴ Below is a chart showing the breakdown by race/ethnicity of low income residents in Tukwila in absolute



numbers.

⁴ "Tukwila, Washington (WA) Poverty Rate Data - Information about Poor and Low Income Residents." *Tukwila, Washington (WA) Poverty Rate Data*. N.p., n.d. Web. 2 July 2014.

Figure 3. Breakdown by ethnicity of low income residents in Tukwila. (Source: <http://www.city-data.com/poverty/poverty-Tukwila-Washington.html>)

2007 demographic statistics show that the total retail sales in Tukwila are roughly \$1.55 billion, much higher than its surrounding cities including Burien, SeaTac, Des Moines, slightly higher than Kent, and \$80 million less than Renton. We must be mindful that the population of each of these cities is larger than Tukwila; Renton, especially, has a population five times of Tukwila's. However, most of the retail categories saw decreased spending over years since 2008, and food and beverage stores are among them.⁵

King County is relatively free of food deserts; however, Tukwila is one of the few exceptions. Food deserts, as defined by the USDA, are “urban neighborhoods and rural towns without ready access to fresh, healthy, and affordable food.”⁶ The map⁷ on the right may serve as a tool assisting grocery retailers and community developers in identifying areas for potential development. Within the borders of Tukwila, the green areas are where “a significant number or share of residents is more than 1 mile (urban) or 10 miles (rural) from the nearest supermarket,”⁸ this is the traditional definition of a food desert.

Areas of the City that would be considered a “food desert” by the USDA include the neighborhoods of Allentown⁹, Duwamish and Foster Point.

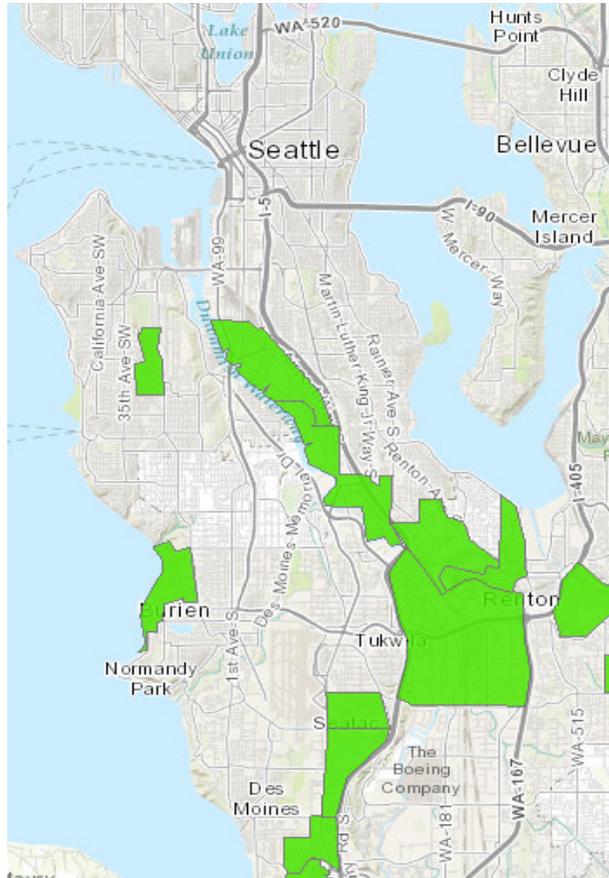


Figure 4. Food desert around Tukwila. (Source: USDA)

Tukwila International Boulevard (TIB)

⁵ “City of Tukwila Strategic Plan.” City of Tukwila. 2012.

⁶ “Agricultural Marketing Service.” *Agricultural Marketing Service - Creating Access to Healthy, Affordable Food*. N.p., n.d. Web. 27 June 2014.

⁷ “USDA ERS -FOOD DESERT.” USDA, n.d. Web. 29 June 2014.

⁸ “USDA ERS.” *USDA ERS - Go to the Atlas*. N.p., n.d. Web. 27 June 2014.

⁹ The City is currently conducting a door to door survey of Allentown residents and access to grocery stores has been a stated concern of many of the residents.

Puget Sound Regional Council found in their case statement that:¹⁰

“The Tukwila-International Boulevard (TIB) transit community...has a population of 4,155, with 73 percent minority, making it one of the most diverse transit communities in the region. The Community is a residential and commercial center for Somali immigrants to the region.”

The majority of the households in TIB community rent. Nearly one out of five households is living below the poverty level.

The Tukwila International Boulevard Corridor has been serving as a regional example of TOD (Transit Oriented Development) that has attracted businesses and tourists since 2000. The TIB light rail station opened in July 2009, connected to a 600-stall park and ride, and is served by bus rapid transit and other transit routes. The Corridor is gradually becoming a friendlier pedestrian area with new sidewalks.¹¹

Saar's Super Saver Foods in Tukwila

Opened in December 2013, Saar's Super Saver Foods is located at the intersection of Tukwila International Boulevard and South 144th street, location of the former Tukwila Trading Company and Larry's Market. Saar's grocery store chain has been operating as a Washington-based independent grocery chain since 1988; the first store was called Saar's Market Place.¹² Besides the Tukwila store, Saar's also operates in Seattle, Tacoma, Auburn, Renton, Lakewood and Oak Harbor.



Figure 5. Saar's Super Saver Foods. (Photo credit: Junpei Guo)

The location of Saar's is close to the bus stops of Route 124 and 128, and is only 4 blocks (0.7 miles) away from the Link Light Rail -Tukwila International Boulevard Station. This is a key location for the City of Tukwila where the neighborhood functions as one of Tukwila's main street and has direct driving access to every neighborhood in Tukwila.¹³ Pedestrian access from

¹⁰ "Tukwila International Blvd." *LIGHT RAIL/BUS RAPID TRANSIT/BUS*. Puget Sound Regional Council, Oct. 2013. Web. 30 June 2014.

¹¹ "Market Analysis for Tukwila International Boulevard Corridor Located in Tukwila, Washington State." (2007): n. pag. Gardner Johnson, 2007. Web. 1 Nov. 2014.

¹² Slack, Eric. "Saar's Market Place." *Retail Merchandiser*. N.p., 2008. Web. 31 July 2014.

¹³ Derek Speck (City of Tukwila). February 19, 2013.

other neighborhoods to TIB can be difficult due to the topography of the area. Although still new to the community, Saar’s is now serving as the main grocery store in Tukwila.

Previous Work on Food Access

In March 2014, the City of Tukwila’s Department of Community Development (DCD) conducted the Tukwila Comprehensive Plan Survey, and 262 responses were collected from online, community connectors, and Community Conservation open houses. Questions covered housing, business, food access and service needs along TIB. In food access section, people were asked about whether they were able to buy the kinds of food they wanted near their homes, as well as their primary sources of food.

71% of total respondents surveyed could find food they wanted near home. 87% respondents purchased their food from large grocery stores; most of whom shop at Saar’s. Among those who purchase their food from big box grocery stores (55%), Costco and Wal-Mart are the most popular destinations. Half of all respondents also shop at ethnic grocery stores, including Halal and Latino establishments.

Grocery Stores in the Local Food System

Food retailing is a for-profit business. Currently, however, a typical grocery store’s profit is estimated to be \$6,000 per week on average, differentiating them from other for-profit businesses with larger profit margins.¹⁴ Although grocery stores provide an essential service to their surrounding neighborhoods, they require enough profit to stay sustainable.

A food system includes all processes involving the production, processing, transport and consumption of food.¹⁵ In Tukwila, most residents live within six miles of a grocery store.

Grocery stores, in this report, are defined as stores ranging from 30,000 to 70,000 square feet and offering fresh produce, a meat and dairy department, and a grocery area. Below is a list of existing major grocery stores in Tukwila.

Table 2. Existing grocery stores in Tukwila.

Saar’s Super Saver Foods 3725 S 144th St Tukwila, WA 98168	Grocery Stores
Cash & Carry 230 Andover Park E Tukwila, WA 98188	Grocery Stores Wholesale Grocers
Target 301 Strander Boulebard Tukwila, WA 98188	Grocery Stores

¹⁴ "Access to Healthier Foods: Opportunities and Challenges for Food Retailers in Underserved Areas." *Food Marketing Institute*, July 2011. Web. 26 June 2014.

¹⁵ "What Is the Food System?" *Future of Food*. University of Oxford, n.d. Web. 30 Sept. 2014.

Seafood City 1368 Southcenter Mall Tukwila, WA 98188	Grocery Stores Fish & Seafood Markets
Costco 400 Costco Dr, Tukwila, WA 98188	Grocery Stores Wholesale Grocers

There are also many smaller retail stores that complement the food system, such as 7-Eleven, Nasrulaah Grocery, and Javi's Mexi-Market. Most of these groceries and delis cater to the ethnic communities in Tukwila, offering ethnic food like Halal meat.

The Impact of Grocery Stores in Underserved Areas

In most low-income areas, people's choices about what to eat are severely limited by what they can afford and by the options available to them. Therefore, a quality grocery store could be of vital importance to the food desert area it is serving.

Access to healthful food

Major food businesses in Tukwila are fast food, including Wendy's, McDonald's, as well as some other mainstream fast food chains. While unhealthy eating may be economically cheaper in the short-term, the consequences of long-term limited access to healthy foods is one of the main reasons that minority and low-income populations suffer from statistically higher rates of obesity. Regarding this, a grocery store where healthful foods are accessible and affordable to the neighborhood is necessary in offering healthy eating options.

New local job opportunities

According to the 2008-2012 American Community Survey,¹⁶ out of a total of 14,476 Tukwila residents aged 16 and older, 4,501 are not in the labor force, and 1,046 are currently unemployed among 9,975 who are in labor force.

Grocery stores usually offer new jobs for the neighborhood, since most grocery stores tend to hire directly from the areas where they operate.¹⁷ Saar's has benefited the area's diverse population by hiring a large number of area residents.

Poverty and crime reduction

Economic development is the most powerful instrument in reducing poverty and crime.¹⁸ Employment is the first step. Once a grocery store is set up in the densely populated area in

¹⁶ "American FactFinder - Results." *American FactFinder - Results*. U.S. Census Bureau, n.d. Web. 30 June 2014

¹⁷ "Access to Healthier Foods: Opportunities and Challenges for Food Retailers in Underserved Areas." *Food Marketing Institute*, July 2011. Web. 26 June 2014.

¹⁸ Shapiro, Robert J., and Kevin A. Hessett. "The Economic Benefits of Reducing Violent Crime." *Center for American Progress*, June 2012. Web. July 2014.

Tukwila, the various employment opportunities a local grocery store could generate will attract more people into workforce and alleviate poverty, thereby reducing crime rates.

Better access to grocery stores means that families spend less time and money on traveling when grocery shopping. We believe that everyone deserves access to healthy food. Grocery store access is an important piece of a comprehensive approach to fighting against food desert.

Opportunities for Saar's

By addressing the following issues that the City has been striving to improve over years, we believe there are great opportunities for Saar's to attract more customers from local and surrounding cities.

Convenient Transportation

Tukwila International Boulevard currently serves as one of the "Main Streets" in Tukwila. The convenient bus and light rail service ensure an accessible ride for those from surrounding neighborhoods. In addition, there are ample parking spaces both in the Saar's parking lot.

Strategic Location

The property is at the intersection of Tukwila International Boulevard and South 144th street, close to bus stops of Route 124 and 128, and is only 0.7 miles away from the Link Light Rail - Tukwila International Boulevard Station. This is a key location for the city where the neighborhood functions as Tukwila's downtown, combining residential and commercial areas.¹⁹

Meanwhile, annual average daily traffic counts (AADTs) are a major concern of grocers during site selection, as this is a good measure of consumer exposure. Most of them look for AADTs in the range of 30,000 to 40,000 average cars or more per day in suburban areas.²⁰ At Tukwila International Boulevard, according to Washington State Department of Transportation (WSDOT), the AADT in 2013 is 31,000.²¹ This means Saar's has the potential to attract more customers, especially if the store exterior were more visible and appealing.

The new Tukwila Village will be across the street from this location. Its groundbreaking was on August 1st. Tukwila Village will have 300 senior apartments, 80 family apartments, a new library, a new medical and dental clinic, 11,000 square feet of retail (Café, restaurants, etc.), a community meeting room, and a plaza. It will bring in hundreds of new residents to live across the street from the store location, and will become the central gathering place for residents

¹⁹ Derek Speck (City of Tukwila). February 19, 2013.

²⁰ Brubaker, Benjamin T. "Site Selection Criteria in Community Shopping Centers: Implications for Real Estate Developers." Massachusetts Institute of Technology, Sept. 2004. Web. 1 Oct. 2014.

²¹ "WSDOT - Annual Traffic Report." WSDOT, 2013. Web. 01 Oct. 2014.

from all Tukwila neighborhoods. Saar's could benefit greatly from this foreseeable economic catalyst.

Improved Safety

The City has taken many steps over the years to improve public safety in this neighborhood. Firstly, the City re-opened the Police Neighborhood Resource Center at 14862 Tukwila International Boulevard in 2012. This facility greatly improves the speed with which police can respond to calls for service in the neighborhood. The facility also houses monitors for the ten video cameras the City has placed on key streetlight poles in the neighborhood. Police monitor those cameras and can very quickly respond if they observe suspicious activity. Secondly, the City Council has approved a 2013-2014 budget that enabled the City to hire more police officers and staff. These investments are providing an increased police presence on Tukwila International Boulevard and already improving safety. Lately the City has been working through the US Attorney's office to purchase the Great Bear, Boulevard, and Traveler's Choice motels in the neighborhood.²² The seizure of these motels by the Federal Government drastically reduced crime in the area. These purchases were completed this summer.

Government Support

The City of Tukwila has a strong commitment in making TIB a great neighborhood. Millions of dollars have been invested rebuilding Tukwila International Boulevard, installing sidewalks, and undergrounding utilities. With a deep understanding of local residents' demand for a high-quality, full-service grocery store, the City has been actively building partnerships with different parties that can help promote the process. The City has also been providing financial support to various outreach activities in gathering community input, such as focus groups within Tukwila's diverse communities.

The City will continue to invest in infrastructure, social programs, and public safety in the long run.

²² "2014 City-Wide Work Plan-Mid-Year Update." City of Tukwila. 1 July 2014.

Chapter 2. Methodology

Literature Review

The literature review was performed to gather information about previous work on food access and local food system, and gain understanding of the role of Saar's Super Saver Foods, in preparation for the following surveys and focus groups.

Neighborhood Survey

Our neighborhood survey aimed at gathering more information on consumers' opinions about grocery stores in Tukwila. There were 419 responses in total, with 275 from online and 144 through mail and from community events.

Questions of this survey were geared towards the following groups of people:

- People that regularly shopped at Saar's Super Saver Foods
- People that didn't shop at Saar's Super Saver Foods
 - Who were familiar with it
 - Who were unfamiliar with it

Questions generally covered consumers' grocery shopping behavior, shopping experience at Saar's, expectation of extended grocery services, and demographic information.

We distributed the survey at several community events held by the City between July and September. For those who were unable to fill out the survey immediately, we offered self-addressed envelopes so that they can mail the surveys back to us later. These community events included the July 4th celebration at Fort Dent Park, Touch-A Truck on July 26th, National Night Out on August 5th, Tukwila Village Groundbreaking on August 8th, and A Taste of Tukwila on September 19th.

In-Store Survey

Based on the feedback we received from the neighborhood survey, we designed an in-store survey to focus specifically on Saar's customers. The questions included people's grocery shopping preferences and behavior, shopping experience at Saar's, expectations of Saar's and other local grocery services, as well as general demographic information. We expected to collect 100 responses within 10 days in September; a high volume of customers was expected during this period, offering the best opportunity to collect data. However, we had to put it off to October due to an unexpected delay in gift card authorization. The ultimate goal of the

project, which this survey contributed to, was to provide Saar's with information regarding the needs of its customer base so that it may identify customers' needs and cater to a greater proportion of the community.

The timeframe was from October 7th to November 10th. We conducted this survey at Saar's Super Saver Foods at 3725 S 144th Street Tukwila, WA. Junpei Guo, the Economic Development Intern for the City of Tukwila, coordinated the entire survey process. Our table was located near the main entrance; as customers enter the store, they would be able to identify our table and see a poster detailing our survey and giveaways. Each survey participant received a \$3 Saar's gift card in return for their participation. The cost of these gift cards was shared evenly by both Saar's Super Saver Foods and the City of Tukwila. Participants reflected Tukwila's diverse population.

Focus Group

The goal of the focus groups was to further assess how people get food in an effort to understand how our community could improve the accessibility and availability of healthy food resources.

Participants of the first two focus groups were identified from our online neighborhood survey; respondents that were willing to participate in our focus groups left their names and contact information at the end of the survey, which was totally voluntary. For the first focus group, we selected respondents from regular customers of Saar's; the second focus group accommodated people that knew Saar's but chose to not shop there. Therefore, questions for the two focus groups were slightly different.

Focus groups also gave us an opportunity to talk to communities that are not easily reached by online surveys. With the understanding that people from different communities may have different characteristics and needs, we conducted two focus groups with the Latino and Somali communities respectively.

Chapter 3. Data Analysis

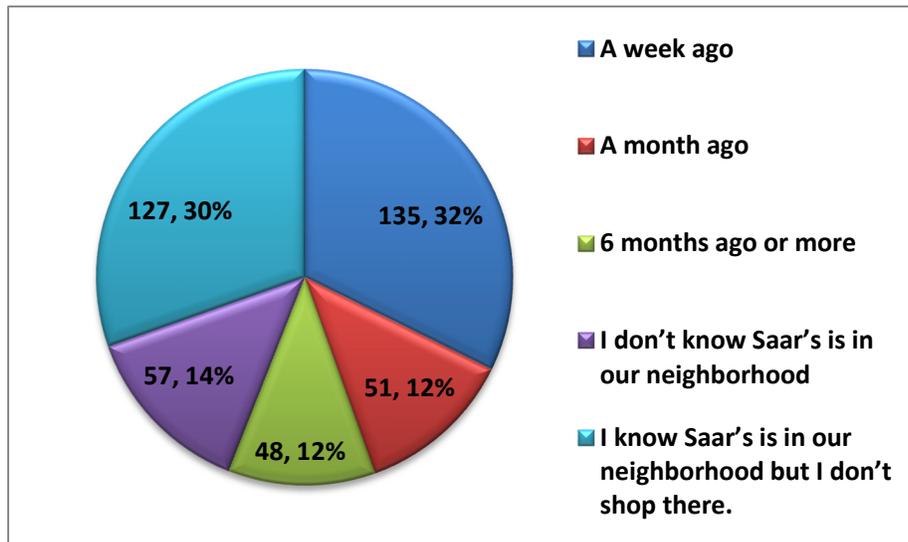
After completing the neighborhood survey, in-store survey, and focus groups, we will now discuss the summary of the data we collected. There are two major components in this section: survey results and focus group feedback. Survey results are further divided into neighborhood survey results and in-store survey results.

Survey Results

Neighborhood Survey

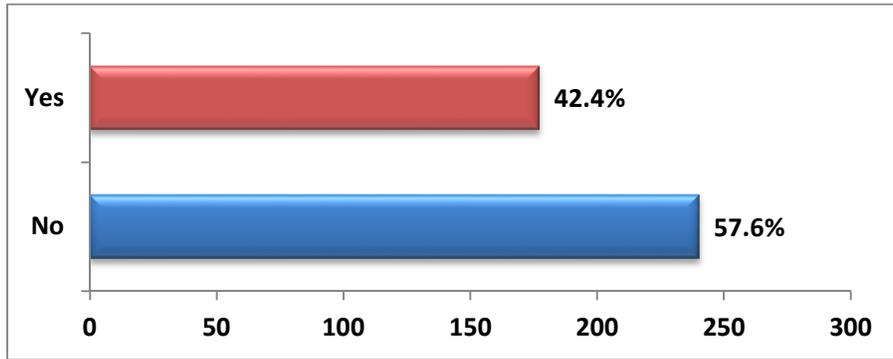
The Grocery Store Project neighborhood survey, with nine questions in total, was sent out to the general public through mail, Survey Monkey, and during community events from July 4 to September 22, 2014. We also posted the link to the survey on the City website and Tukwila Reporter (both online and paper copy). We ended up getting 419 responses. Below is the summary of this survey.

Question 1. When was the last time you shopped at Saar's Super Saver Foods in Tukwila?



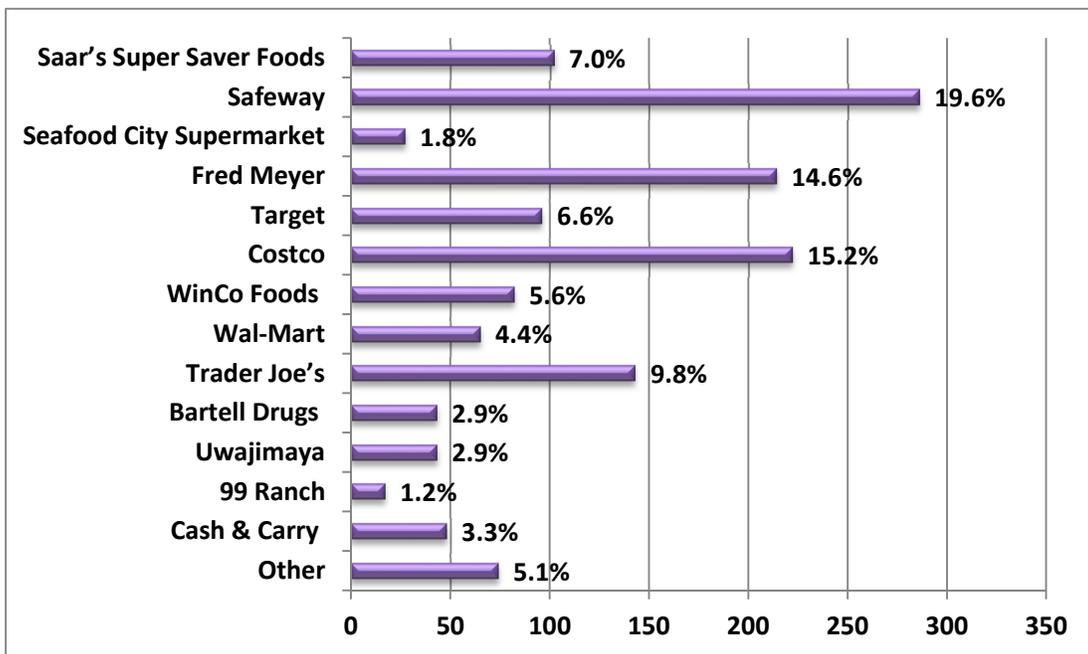
This is a classification question that sorts respondents based upon their shopping experience. Their answers place them into two categories: people who regularly shop at Saar's Super Saver Foods in Tukwila and people who don't shop there. The latter is further divided into people who know Saar's and those who don't. From the pie chart we can see that 32% of the respondents shopped there a week ago, while there is another 30% who know Saar's but don't shop there. About a quarter of them are not regular shoppers there.

Question 2a. Do you typically purchase your grocery needs at one store?



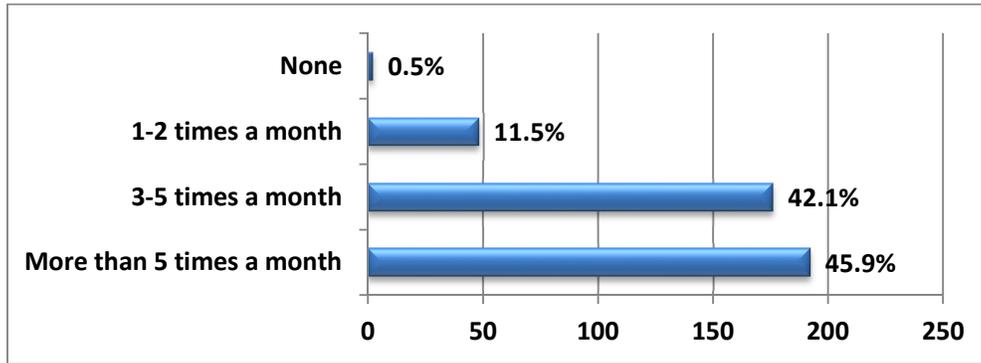
177 respondents answered *yes* and 240 answered *no* to this question. In surveys we distributed at community events, we also asked people what products they purchase from each stores, and there is a clear sign showing that people tend to buy different things from different stores.

Question 2b. Which of the following grocery stores do you shop at most often?



This question aims at gathering information on people's grocery shopping preferences. From the products they list under each specific store, nearly one in five people shop at Safeway most often, followed by Costco and Fred Meyer. Among all the stores listed here, only Saar's, Seafood City, Costco, Bartell Drugs and Cash & Carry are located in Tukwila, which add up to 30% in total. **This means people shop outside of Tukwila 70% of the time.**

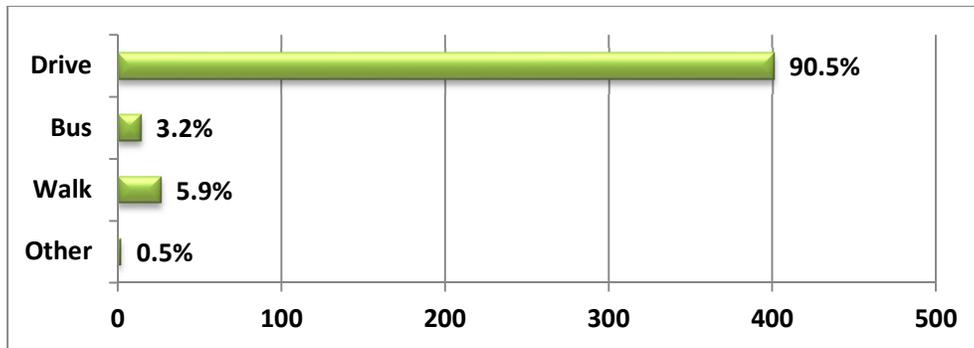
Question 3. How often do you shop at grocery stores?



Nearly half of the people surveyed shop for groceries more than five times a month, and a total of 88% of them shop at grocery stores at least three times a month.

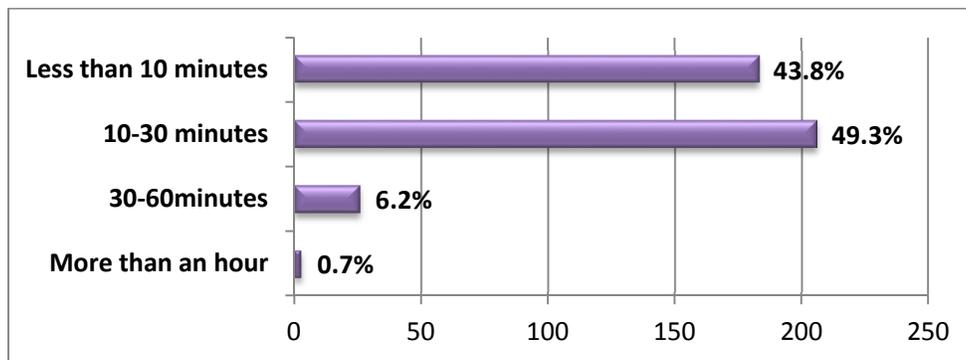
Question 4a-4c are designed to examine the role of transportation in making shopping decisions.

Question 4a. How do you travel to shop at grocery stores?



More than 90% of the respondents drive to grocery stores. 3.2% travel by bus and 5.9% on foot.

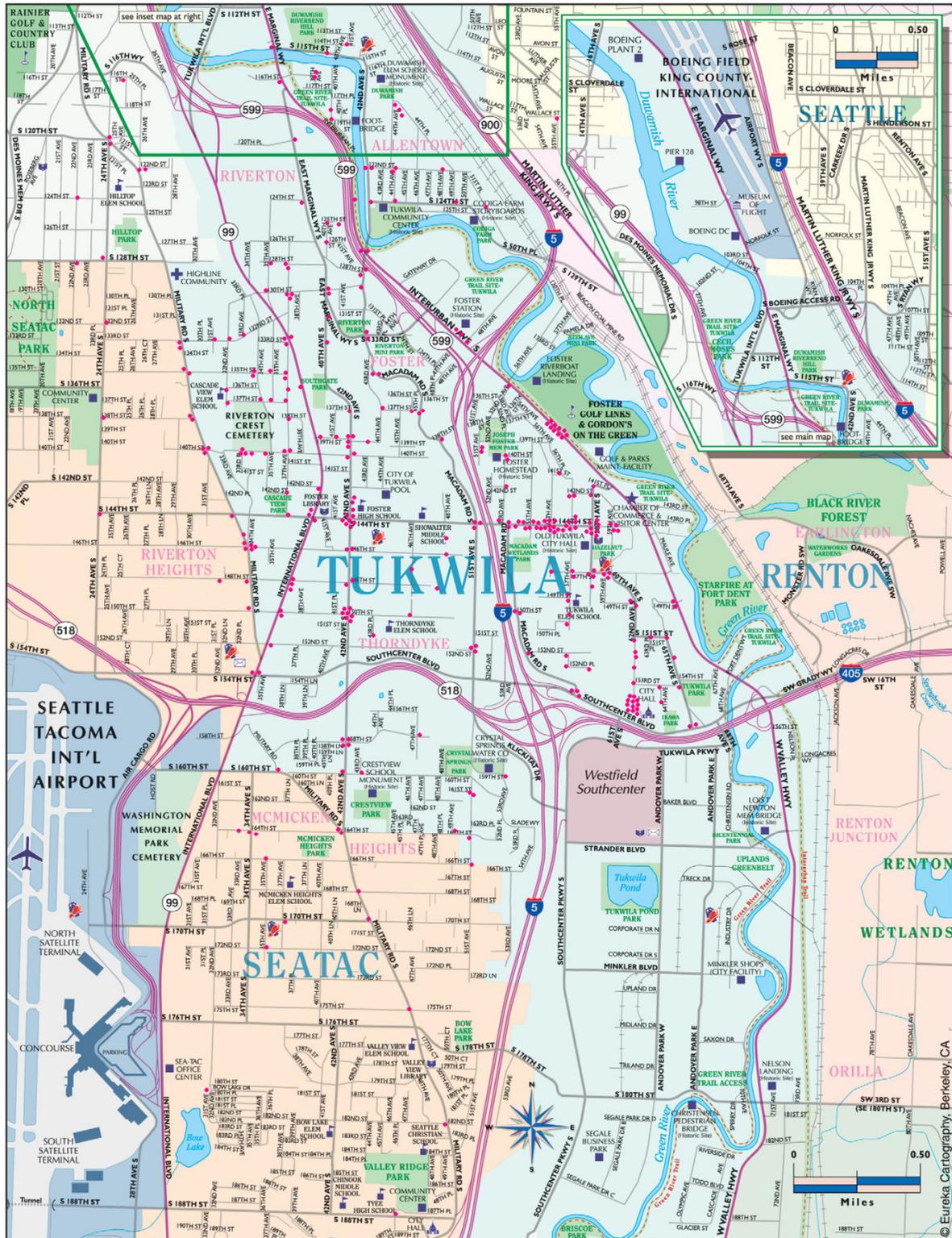
Question 4b. Please estimate the time you travel to purchase groceries.



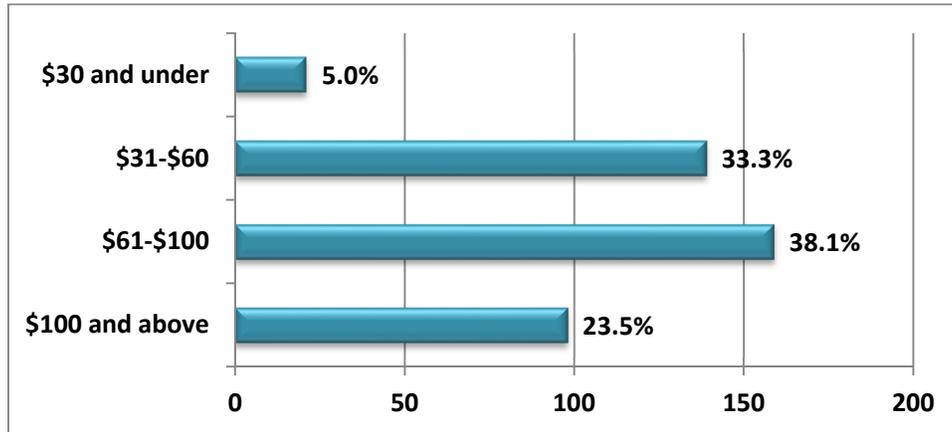
93% of all respondents spend less than 30 minutes commuting to grocery stores, among which nearly half spend less than 10 minutes.

Question 4c. Please provide the nearest cross street to where you live.

The map below shows the geographic locations of survey respondents' places of residence.

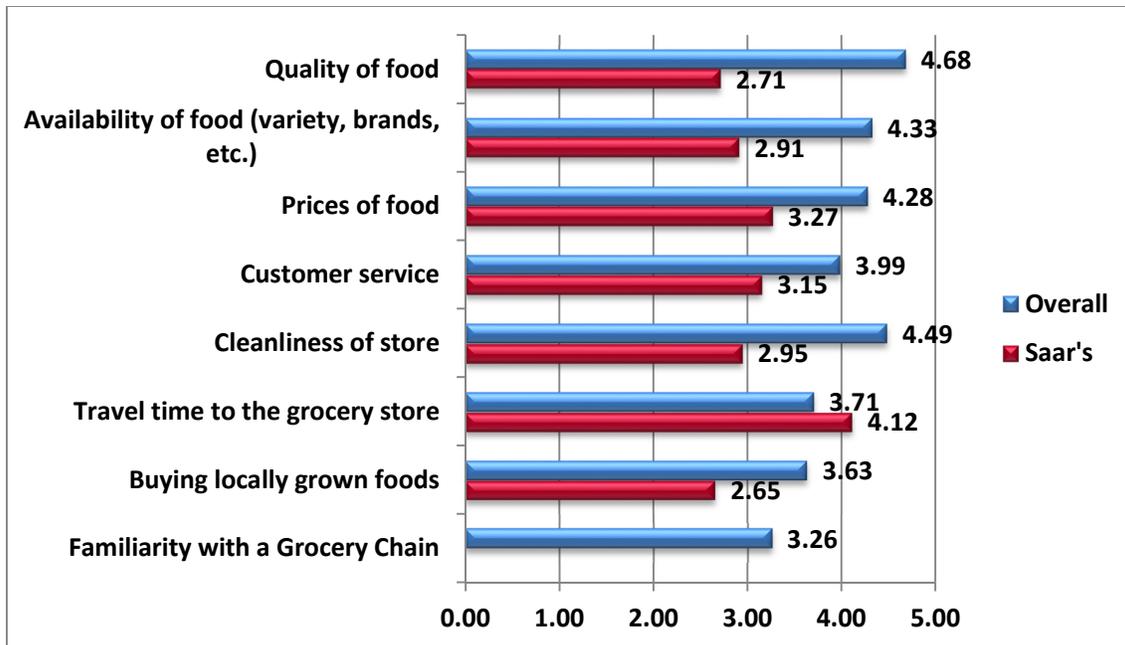


Question 5. How much do you typically spend every time you visit a grocery store?



Approximately 60% of respondents spend more than \$60 per visit; only 5% spend \$30 or less every time they go grocery shopping. Overall, people spend an average of \$81.3 per trip. Taking into account people’s average monthly grocery shopping cost that was previously calculated, Tukwila residents spend \$374 on groceries every month.

Question 6a. Please circle the number that best represents your decision to purchase groceries from a particular grocer.



Among all 411 people that answered this question, the two most important factors for people in choosing a primary grocery store are food quality and store cleanliness, followed by food availability and prices. Buying locally grown food and familiarity with a grocery chain are not major considerations when making grocery shopping decisions.

Question 6b. Please circle the number that best represents how well Saar's Super Saver Foods in Tukwila meets your shopping expectations.

Based on the reflection of 309 people filled out this question, Saar's is not doing a satisfying job in providing quality food and keeping a clean store, scoring only 2.71 and 2.95 respectively. However, travel time to it stands out among all criteria-it goes beyond the average by 0.41.

Question 7a. If you have shopped at Saar's, what recommendations would you give them/what do you expect to see in the future?

The excerpts below offer a flavor of the extensive responses provided to this question. Although not included in their entirety here, some of the responses were quite comprehensive and many respondents brought up multiple issues that they believe Saar's can improve on.

It needs a "face lift". It needs fresher vegetables/fruits/herbs. It needs a butcher in-store. Dairy products are dismally dated. Want to see more organic produce, on-shelf items, and meat/poultry/fish/dairy fresh items.

I think the ethnic diversity of the groceries is great! I enjoy Trader Joe's because of the unique food items at reasonable prices. I do not necessarily like Safeway but it has a brighter cleaner feel and some more reasonable prices. I feel I have to check expiration dates on items at Saars... Saars staff is friendly and helpful so I would hope that would not change. We have a lower income living in Tukwila...I would like to see food prices be affordable for folks. I also am understanding that to bring in more choices costs would go up for some items...I am okay with that.

The store needs to have quality produce available for a price. ORGANIC availability is a big big big plus!!!

General appearance of inside store is dark, which results in the impression of the store being dirty. Quality of food needs to go up - seems to be selling lots of pre-frozen items, such as meats and vegetables. Good selection of alcohol. Better and "cleaner appearance" of other household products, like beauty aids, baby foods and stuff, etc. Maybe have appearance model of Trader Joe's and Whole Foods with half price of the latter.

There are so many signs in the overhead that the relevant information is lost in the clutter. Would like to see some of the smaller shopping carts as an option to rolling around a monster cart or packing around the store a little basket. Love all of the ethnic choices available.

Their stores need to be cleaner, sharper! When in Saar's I always feel "old" and "tired" the lighting the shelving everything always seems so tired and out dated. I use to go to a Saar's on Pearl in Tacoma and it was always so depressing.

I'd tell them what I do/don't buy. I do buy pre-packaged items. I also appreciate that they serve a number of cultures well with a variety of international food and ingredients. I don't buy things that have short a shelf life - produce, meat, eggs, and milk. Also, everyone I talk with that shops there seems to feel the prices are too high.

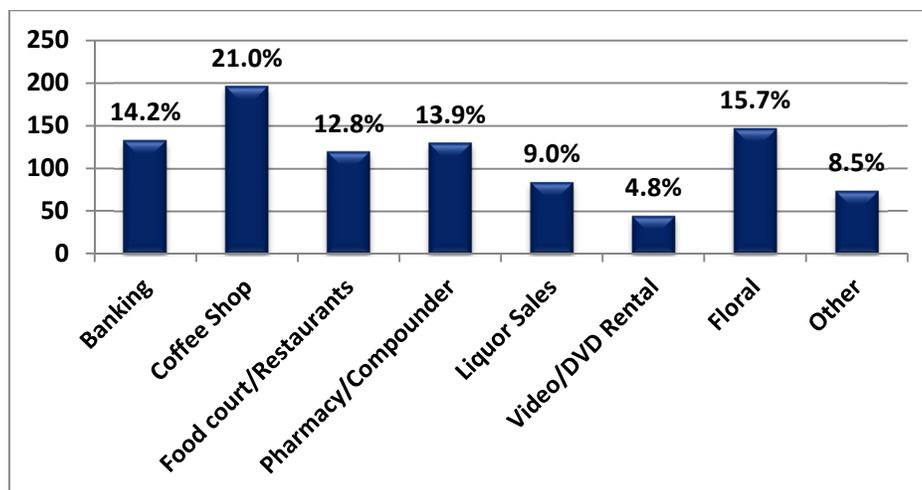
I will often go to Saar's for the produce, especially if I am looking for something a bit unique. But I am concerned about purchasing meat. I have in the past and the quality is lacking.

Continue wide variety of ethnic food. Market to the wider Tukwila community, particularly Caucasian. Many people have misconception that Saar's is low quality. I also sense some racism on the part of Caucasians; keeping them from visiting Saar's.

As evidenced by these quotes, people's major concerns are around food quality, customer service, and store layout. However, there is also a strong community consensus that Saar's can do better than the status quo. Other frequently mentioned concerns include: improve store security, serve fresh seafood, bring more varieties of food to store, etc.

Question 7b. What other services would you like at your neighborhood grocery store (check all that apply)?

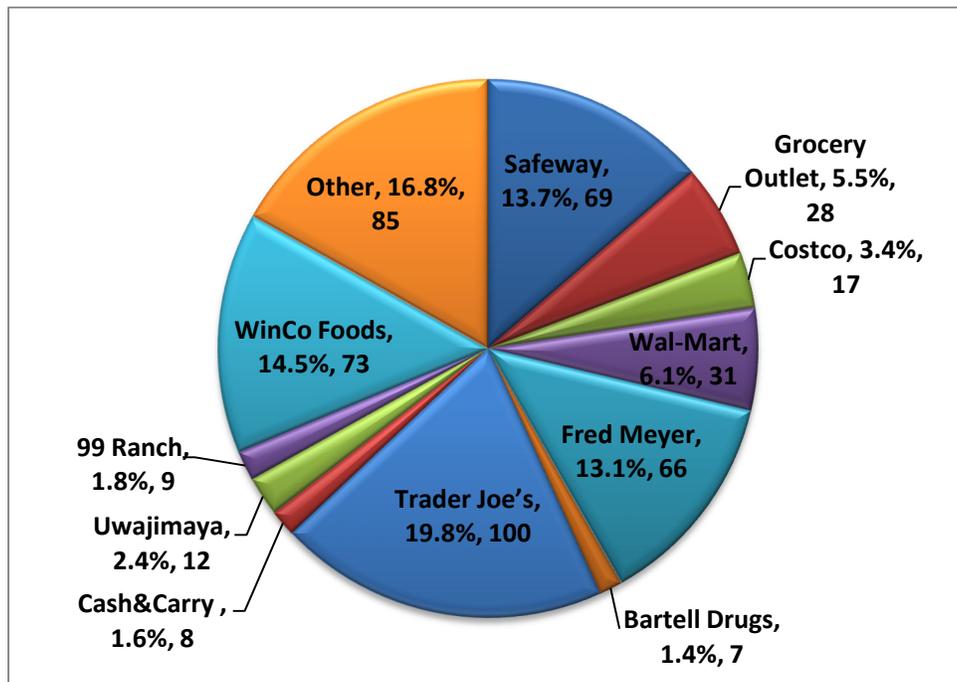
People's comments are summarized into the chart below.



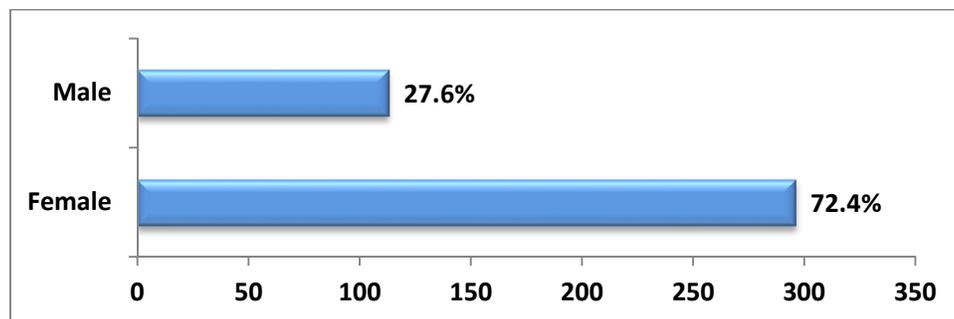
21.1% of the respondents want to see a coffee shop in their neighborhood grocery store. Floral is at the second place, at 15.8%.

Question 8. If there were a chance to have another grocery store in your neighborhood, what would you expect it to be?

As TIB continues to transform, it is important that a grocery store remains in the area. As was discussed above, Saar’s is the third store at the intersection of S. 144th and TIB in the last ten years. The City’s goal is to work with Saar’s to allow it to be more sustainable and cater to the needs of the community; however, having an understanding of the desires of the residents is helpful in the event that Saar’s ceases to operate or if it is determined that the neighborhood can sustain a second grocery store.



Question 9a. Gender.

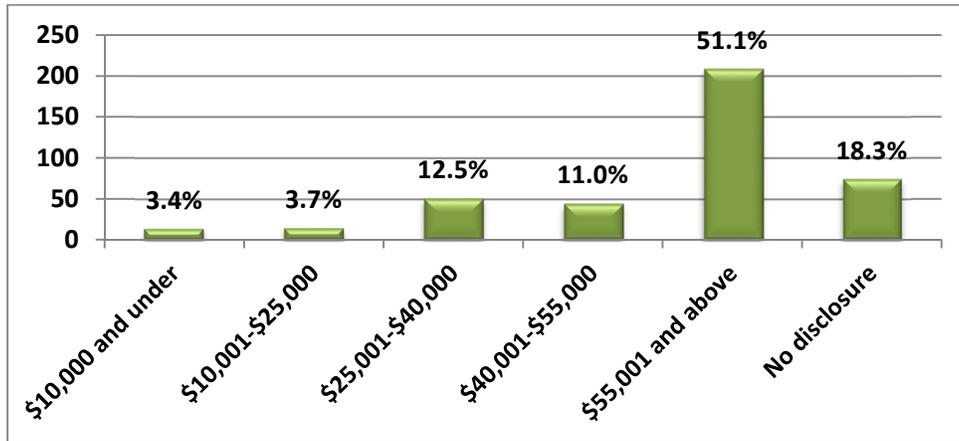


72.4% of respondents were female and 27.6% of them were male. Based upon the grocery store survey women make more grocery shopping trips than men.

Question 9b. Household size.

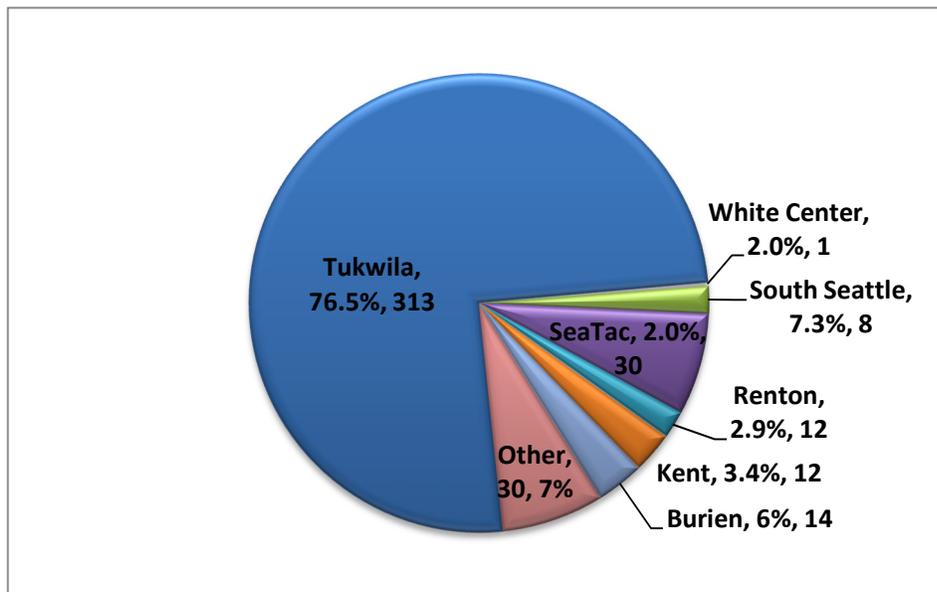
The average household size is 3.4. Assuming that each survey respondent is the only person who does grocery shopping for his or her family, that is, the \$374 monthly grocery cost applies to the whole family, Tukwila residents' grocery budget is \$110/month per person.

Question 9c. What is your estimated annual household income?



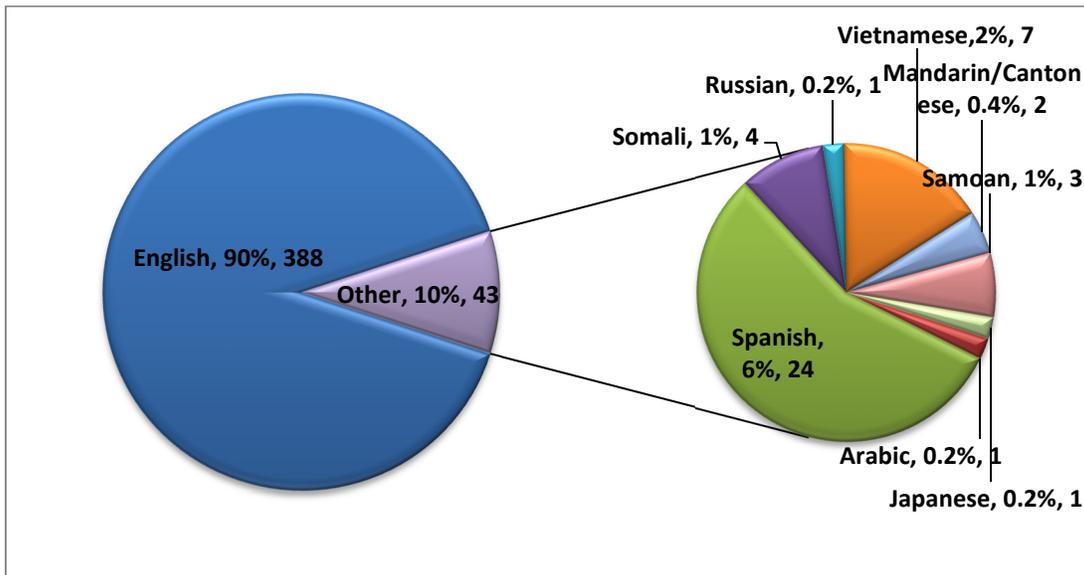
More than half of the respondents have a household income of more than \$55,000 annually. The threshold we set for each option in this question was used to identify grocery needs of medium to low-income population in the community.

Question 9d. Which community are you currently living in?



A total of 313, or 76.5% of people surveyed, live in Tukwila. The rest 23.5% are from surrounding cities including SeaTac, Burien, Kent, Renton, Federal Way, South Seattle, etc.

Question 9e. What language do you use most commonly?

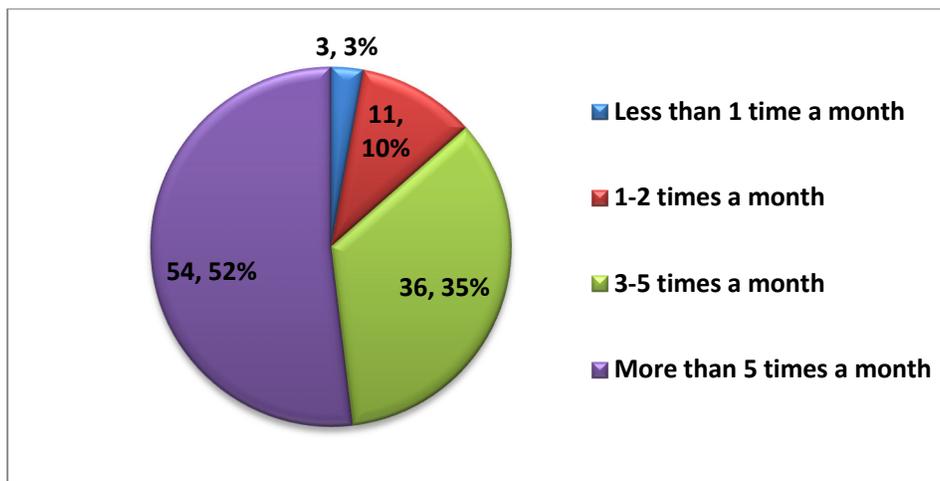


English is the most commonly used language among people surveyed. Other languages include Spanish, Somali, Vietnamese, Samoan, etc.

In-Store Survey

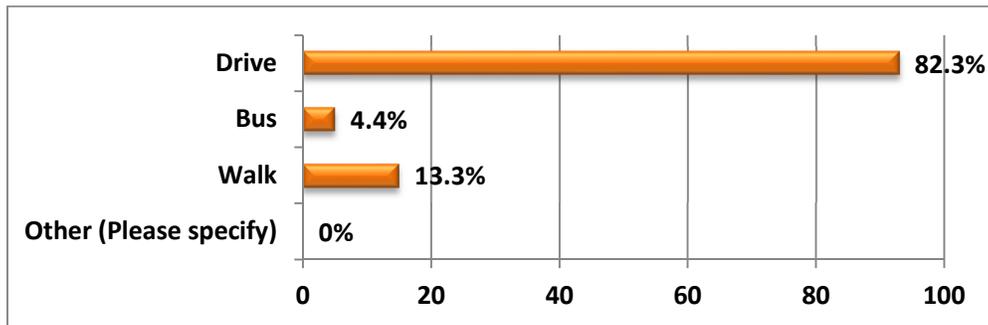
The Grocery Store Project in-store survey consisted of ten questions, more targeted towards Saar’s customers comparing to the neighborhood survey. 105 responses were received within a total of 25 hours spent in store. Interestingly, we got significantly different data on some questions than we got with the neighborhood survey.

Question 1. How often do you shop at Saar’s Super Saver Foods in Tukwila?



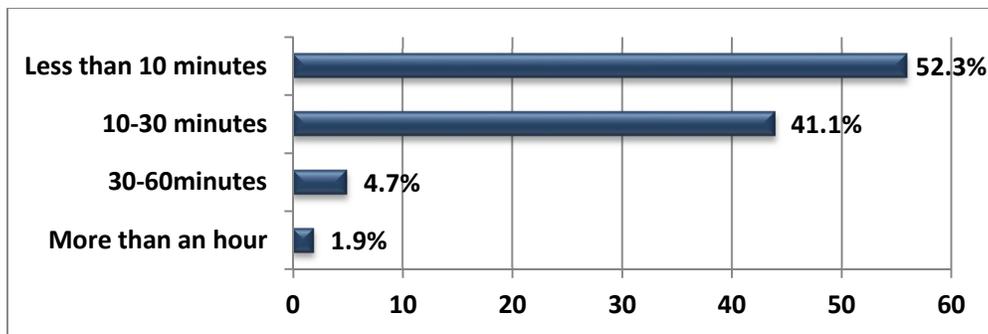
More than half of all respondents shop at Saar’s more than 5 times a month, and some indicate that they buy food here on a daily basis. Nearly 90% visit Saar’s at least 3 times every month.

Question 2a. How do you usually travel to shop here?



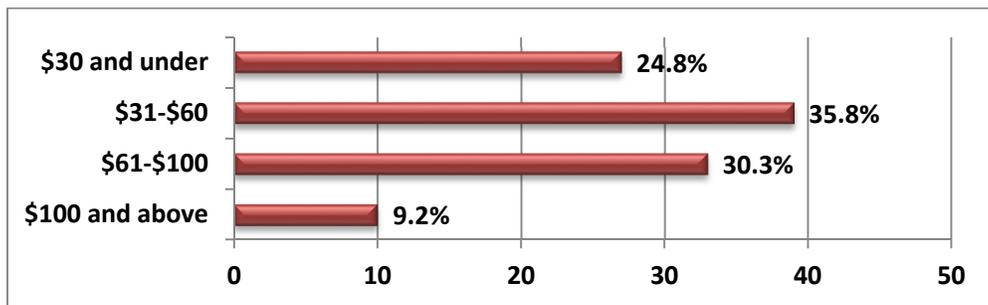
Approximately 82% of people drive to Saar’s, an 8 percent drop comparing to respondents of the neighborhood survey. However, the percentage of people walking exceeds the result in the neighborhood survey by 8%; this reveals the store’s customer demographics in terms of geographic locations-many of them are from nearby neighborhoods and they can easily pick up what they need from Saar’s.

Question 2b. Please estimate the time you travel to shop here.



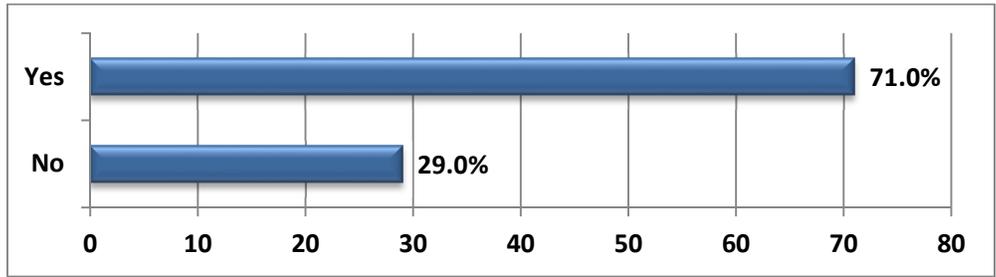
More than 93% of all respondents can access the store within 30 minutes, including those who take public transit. During survey collection, a few people mention that they would like to spend an hour on commute because they prefer Saar’s to stores in their own neighborhoods.

Question 3. How much do you typically spend every time you visit us?



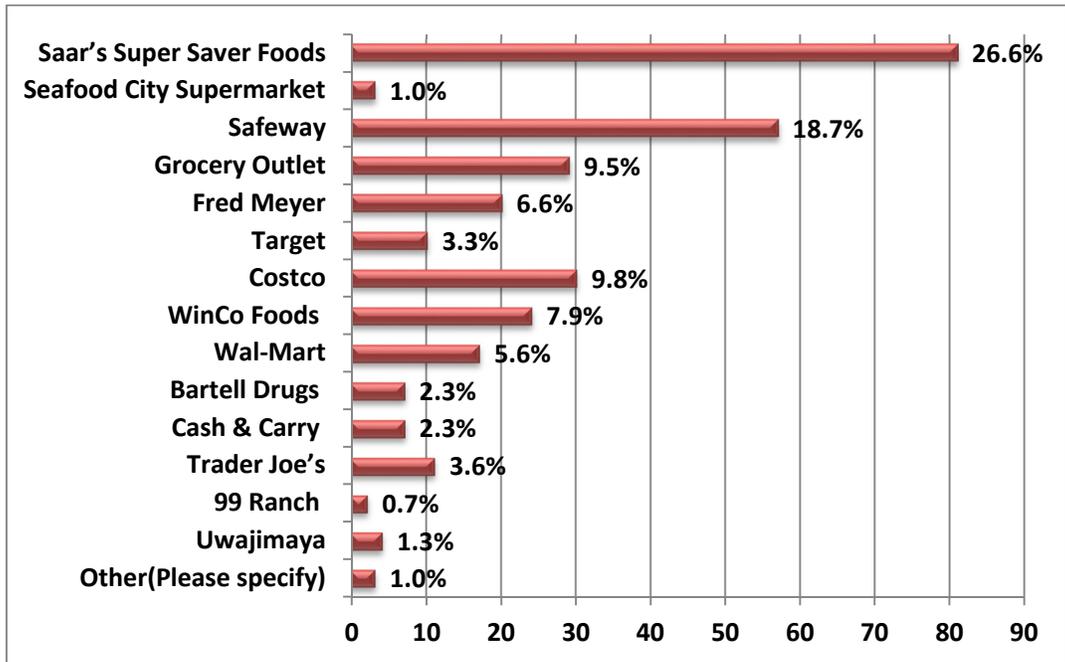
Roughly 40% of people spend over \$60 per visit and 25% of them spend \$30 or less, a contrast to 60% and 5% respectively in the neighborhood survey.

Question 4a. Is Saar's your primary grocery store?



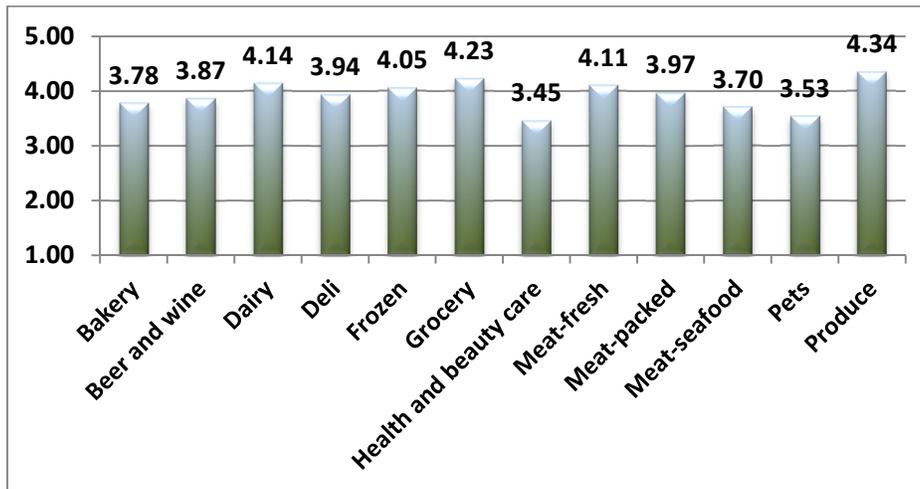
71% of all respondents, who also shop at Saar's during survey period, consider Saar's as their primary grocery store. The other 30% shop at other grocery stores more often. Question 4b will demonstrate people's primary destinations for groceries.

Question 4b. Which of the following grocery stores do you shop at most often?



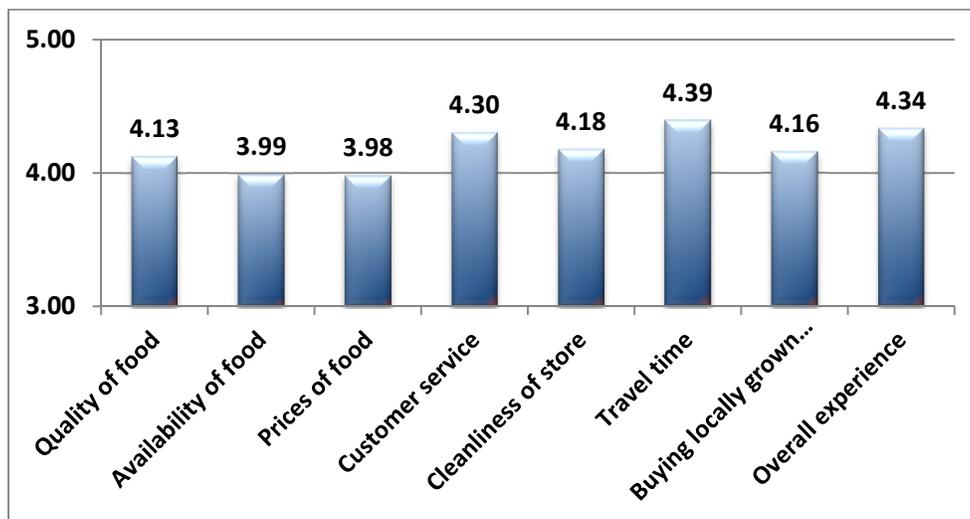
Besides Saar's itself, a preference towards Safeway (18.7%) and Costco (9.8%) can be observed from the chart. Among all other stores, there is an 8% drop in Fred Meyer, 6.2% drop in Trader Joe's, and an emerging interest in Grocery Outlet (9.5%), in comparison to the neighborhood survey.

Question 5a. How satisfied are you with the following departments at Saar's?



In this question we asked people to rate each department listed on Saar's website. They were only permitted to rate departments that they were most familiar with or have shopped at in-store to avoid bias. It can be seen from the chart that produce and grocery were two most highly rated categories at Saar's, while beauty care and pets were at the bottom.

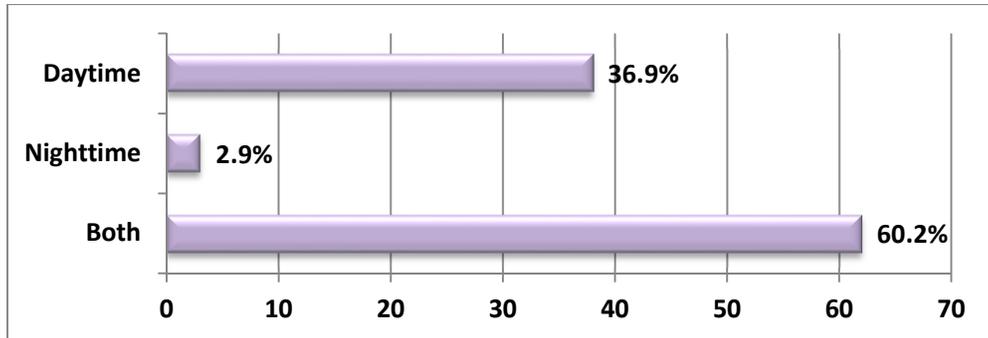
Question 5b. Please circle the number that best represents how well Saar's meets your shopping expectations.



In general, Saar's gets higher ratings from its regular customers than from the entire community. For example, food quality gets 4.13 in the in-store survey comparing to 2.71 from the neighborhood survey; customer service gets 4.3 from Saar's customers as 3.15 from the general public; store cleanliness is 4.18 while it only got 2.95 in the neighborhood survey. This could also explain why most survey participants choose Saar's as their primary grocery store.

Question 6a, 6b, and 6c are designed in regard to safety concerns of Saar's customers.

Question 6a. What time during a day do you usually shop at Saar's?



More than 60% of people shop at Saar's both during daytime and nighttime; very few shop there only during nighttime.

Question 6b. Do you feel safe while shopping inside the store?



Question 6c. Do you feel safe in the parking lot?

Almost everyone feels safe while shopping inside the store. Nevertheless, safety in the parking lot is a concern to nearly 20% of respondents.

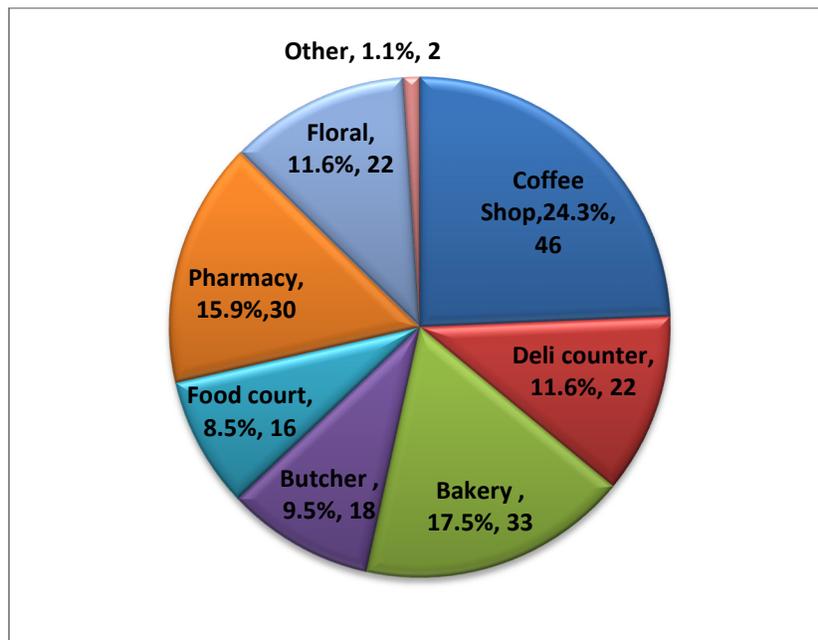
Question 7. Please check the statements that you agree with.

a.	I shop at Saar's because it is the nearest grocery store to where I live.	66
	I shop at Saar's because I prefer it over other grocery stores.	42
b.	I prefer well-known name brands over generic or store brands.	14
	I don't pay attention to the brand, but only care about the quality of the product and price.	59
c.	I prefer to have a broad selection in brands when I am looking to buy a particular item.	37
	I don't care for having a broad selection of an individual product.	24
d.	I can always find what I am looking for very quickly at this store.	47
	I need to spend some time finding what I am looking for at this store.	21

There are four categories in this question-store preference, brands, selection, and shopping time. For each category, people can choose one out of two statements that is most applicable to them. The right column show the number of respondents that checked each statement.

More people shop at Saar's because of its convenient location rather than their preference towards it. Most of them pay more attention to food quality and price than to the brands, but when they are looking to buy a particular item, they tend to prefer a broad selection in brands. Out of every three customers, two can always find what they are looking for very quickly and one need to spend some time to locate the item they want.

Question 8. What other services would you like to see at our store?



Coffee shop stands out among all optional add-on services. Bakery is at the second place while pharmacy follows closely after.

Question 9. What, if anything, can we do to improve your shopping experience at this store?

People have divergent opinions about Saar's. Out of 28 comments we gathered, some positive ones are:

Everything is very good. Price is reasonable as is the quality.

All employees do good job. Keep it up!

However, most people left comments on aspects that they would like the store to improve on:

Better layout and more lightning outside.

Better pricing. Many items are cheaper at Safeway. Not very competitive.

Get the smaller shopping carts.

Has dirty appearance, found outdated moldy food on shelves, afraid to buy any meats, so rarely buy anything but produce, previous Tukwila Trading Company was also horrible with rotten food on shelves, would shop more often if trusted quality.

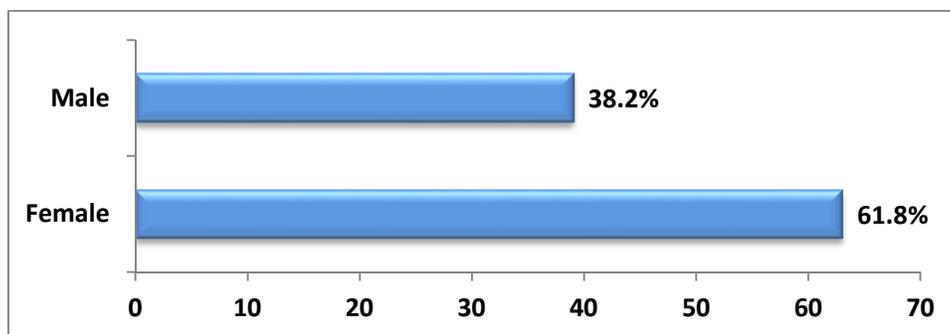
More local, more organic produce, more natural product, more variety-everything seems to be Western Family, not my favorite.

Bakery-Why did your online ad state that something was baked in store when you do not have an in-store bakery? Seafood-Have live seafood department.

The layout is difficult to navigate-can take too long to find in multiple areas.

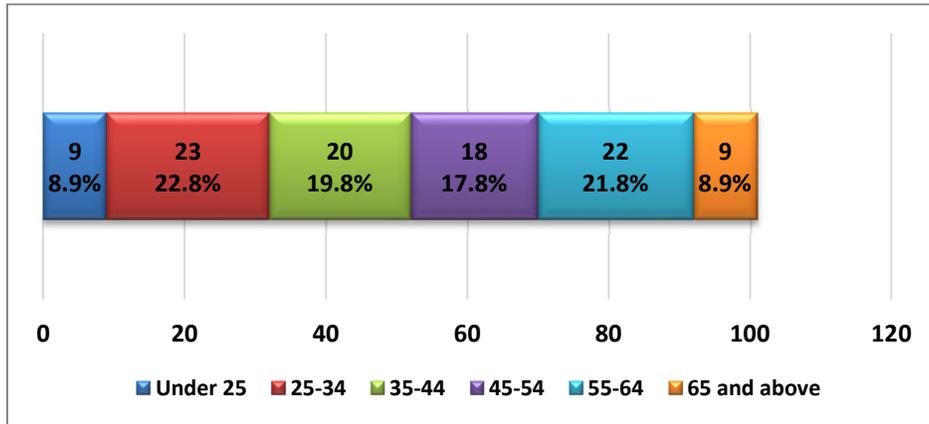
More visible security, more lights throughout parking lot.

Question 10a. What is your gender?



The ratio of male and female is close to 4:6, more balanced than the neighborhood survey which has a gender ratio of 3:7.

Question 10b. What is your age group?



Most people surveyed fall into 25-34 and 55-64 age groups. A couple of teenagers filled out the survey under the assistance of their parents.

Question 10c. What is your household size?

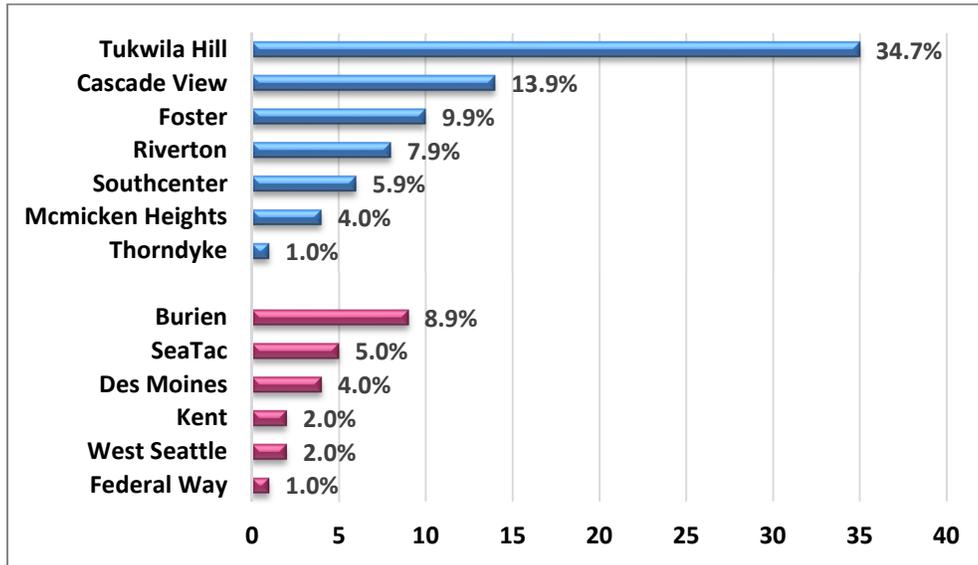
The average household size of people surveyed is 4.0.

Question 10d. What is your estimated annual household income?



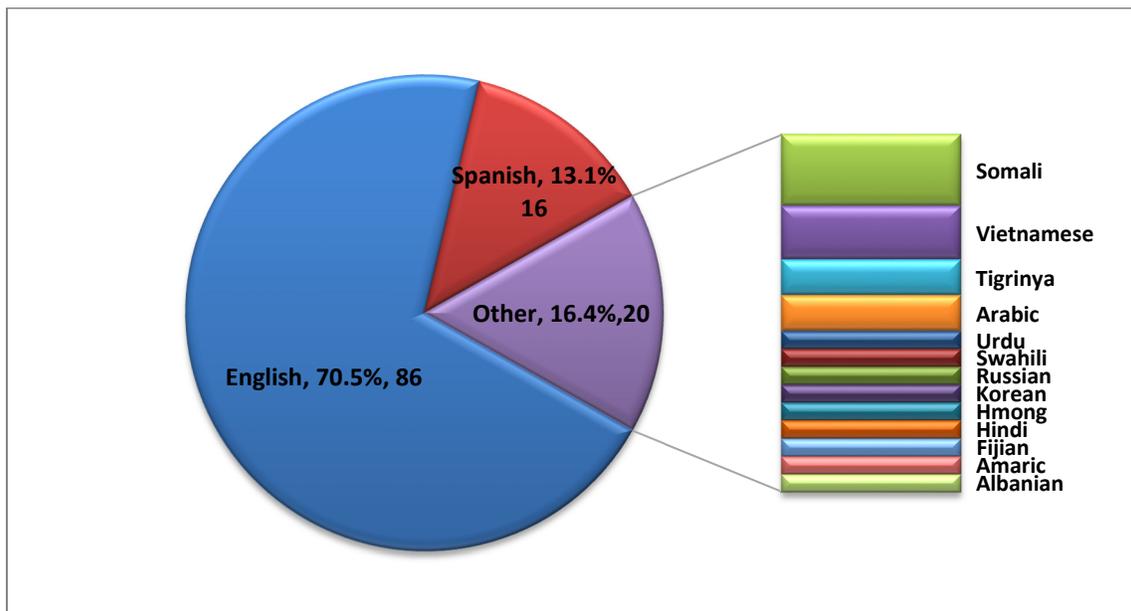
In contrast to the neighborhood survey, respondents of the in-store survey are more on the lower income level-26.5% of them have an annual household income of \$10,000 and under; a total of 49% of people’s families earn less than \$25,000 year. More than half of the neighborhood survey respondents have an annual household income of more than \$55,000, while the percentage here is only 12.7%.

Question 10e. Which neighborhood are you currently living in?



More than one third of all survey respondents live on Tukwila Hill, also known as the Old Tukwila Neighborhood; Cascade View is also a major place of residence of Saar's customers. There are 8.9% of customers coming from Burien, 5.0% from SeaTac, and 4.0% from Des Moines.

Question 10f. What language do you use most commonly?



Similar to the neighborhood survey, English and Spanish are still two biggest languages spoken by respondents. Other languages are listed in the chart, ordering by the number of people who speak them.

Focus Group Feedback

We conducted four focus groups between September 3rd and November 12th in order to further identify the need of the community.

1st Focus Group

The first focus group was held on September 3, 2014 at Foster Public Library meeting room. We sent out invitations to 21 randomly selected respondents from the online neighborhood survey who had shopping experience at Saar's and demonstrated an interest in participating in the focus group; some of them are frequent shoppers and some only shopped there once or twice. Ten of them confirmed to come, one tentative, and nine people showed up eventually. However, one left before the focus group started due to some emergencies. There were 7 female and 1 male.

There were six questions in total, and for each of the questions we had 10-15 minutes for people to discuss. All participants were generous and willing to share their thoughts and the conversation was hence self-generated. Below is a brief summary of people's answers to all questions.

1. What influences your choice of a grocery store?

Quality of produce was most frequently mentioned by people. Besides that, store cleanliness, proximity, travel time, and brands were also their major concerns.

As a follow-up to this question, we asked people about where they shopped for groceries most often. It turned out that Fred Meyer and Costco are on top of the list, followed by PCC and Trader Joe's. People spoke highly of Saar's ethnic food options, but in the meantime claimed that sometimes they couldn't find all their grocery needs at the store. Most of them "would like to drive further to get a better selection."

2. What is your primary source of food?

All participants said that grocery stores were their major source of food. Two persons in the focus group owned home gardens. People went to farmers market once in a while, and Burien and Georgetown ones were most often visited.

3. How often do you eat at home/out?

Three of them stated that they "eat at home at least 90% of the time." Two student participants only commented on restaurants in Tukwila. They also addressed that if there were more restaurants in Tukwila, not just fast food chains, they would be happy to eat out more. All agreed that Tukwila had many good Somali restaurants and they deserved more attention.

4. What do you think Saar's can improve on?

People brought up various issues in this question. One thing that was constantly mentioned was the quality of produce at Saar's. "Things purchased at Saar's don't last," "Always long wait at check-out," "Not thrilled with customer services at Saar's," and "Signs block where products are located" were typical remarks. However, one person in the group had never had any of the above issues at Saar's.

5. What other services do you expect at Saar's?

Two of them would like to see better beer and wine selection. Other services that people discussed include bakery, deli, better seafood, and more organic produce.

We asked people if they have communicated their concerns to Saar's, and only one said yes. One person answered no because he "doesn't think they would care," while others already had low expectations of Saar's and feel that "complaining at any store isn't worth it."

6. Would you like a farmers market in Tukwila?

Everyone supported establishing a new Tukwila Farmers Market. They also mentioned the Tukwila International Farmers Market that was put into operation in 2005. They agreed that the main obstacle for Tukwila to have its own farmers market was a lack of market demand.

2nd Focus Group

Our second focus group took place on October 9th, 2014 at Foster Public Library meeting room.

There were five questions in total, and for each of the questions we had 10-15 minutes for people to discuss. Same as the first focus group, participants were also randomly selected from neighborhood participants; but what's different from the first one was, most of the participants indicated in the survey that they knew Saar's is in our neighborhood but they chose to not shop there. Meanwhile, there was a better gender balance, with five females and three males, representing different age groups. A summary of the conversation is as follows.

1. What influences your choice of a grocery store?

People made grocery shopping decisions based on:

- Freshness and quality of the produce
- Surroundings of the store
- Familiarity with the store
- Organic food
- Proximity

Price was not a major concern in making shopping decisions. In terms of people's current go-to stores, they shopped at Trader Joe's in SeaTac, QFC and Safeway in Renton, Costco in Tukwila, Fred Meyer in Burien, and PCC in Seattle.

2. What is your primary source of food?

Three people got food from both farmers markets and grocery stores, the rest shopped for food only at grocery stores. However, people indicated that they would like to go to farmers market more if there was one closer.

3. What keeps you from shopping at Saar's?

The one resounding complaint across the group was store cleanliness, more specifically, "smell in the back of the store near the meat department," "giant hanging tags," and "a cluttered store." Food quality and store safety were also frequently mentioned by people. Last but not least, the location of the store was inconvenient for some people to visit, since they "have to drive up the hill to get there."

As a follow-up, we asked people to brainstorm on how Saar's could improve on the above issues and some created ideas were provided. Here are some answers:

- Offer food samples
- Change of the flyers that are mailed
- Incorporate art into the store
- Use Facebook and other social media
- Have a grand reopening-out with the old and in with the new

The also indicated that they would like to shop at Saar's again should the changes be seen.

4. What do you think about the overall food access in Tukwila?

It was clear from the responses that people were committed to getting a better food environment in Tukwila. They wanted a more customer-friendly, quality-oriented grocery store; they wanted more restaurants rather than fast food chains. One participant from Allentown wanted some grocery options within walking distance and near transit locations since there is nothing currently.

5. Would you like a farmers market in Tukwila?

Besides demonstrating a positive attitude to a new farmers market in Tukwila, people also offered suggestions in making it more attractive to the public. Examples are as follows:

- Well designed to make it nice to walk and relax within
- Set up tables for people to eat
- Highlight Tukwila’s diversity through food
- Have enough food options to choose from
- Invite local artists to perform

3rd Focus Group

The third focus group was conducted at the Tukwila Community Center on Wednesday, November 5th. A group of six Somali women joined this focus group after their weekly exercise session. Alma Villegas, Director of community programs at Global to Local, helped bring the group together. Aisha Dahir, Somali Community Health Promoter at Global to Local, served as the interpreter.

We had four questions for this group. Time for discussion was 10 minutes for each question. Below is a brief summary of the answers to all four questions.

1. What influences your choice of a grocery store?

- Price needs to be competitive
- Distance-since transportation is limited
- Prefer a one-stop store
- Meat quality, especially halal meat

2. What do you like/dislike about Saar’s?

All participants indicated that they shop at Saar’s regularly, as it was the closest store to where they live. Their major concern about Saar’s was that they have to shop there even if it’s pricier than other stores, since they didn’t drive or have vehicles.

Pros:

- Easy to find things they need
- Good customer service
- Feel safe while shopping inside

Cons:

- Fruit goes bad quickly, and the taste is not very good
- Bananas are not fresh (it’s the no.1 fruit in Somalia)
- Don’t have enough organic options

3. What do you think about the overall food access in Tukwila?

Basically everyone was satisfied with the current food access in Tukwila, because “everything we need can be found within walking distance.” According to them, there was no need to take the bus to buy food and when necessary, they can always carpool to Costco and Safeway.

4. Would you like a farmers market in Tukwila?

Many of the participants had lived in Tukwila over ten years and still remembered the old Tukwila International Farmers Market. They liked the fresh produce there and would really like to have a new farmers market in Tukwila.

4th Focus Group

This was the last focus group we held for the project. With the help of Monica Davalos, the Latino Community Liaison from Global to Local, we talked with five Latina women after their weekly exercise at Tukwila Pantry on November 12th, 2014. Questions were the same as the Somali women focus group, and below is the summary of the 40-minute conversation.

1. What influences your choice of a grocery store?

- Price, quality and cleanliness
- If the store is close to home
- If the store staff speaks Spanish
- If the store has organic produce

2. What do you like/dislike about Saar’s?

Pros:

- Convenient store hours
- Good ethnic options
- Have coupons in store

Cons:

- Don’t have bulk sale
- Fruit and vegetables go bad very fast, although they look good from outside
- Meat and dairy are low quality
- Bought expired items-milk and yogurt
- Staff doesn’t check expiration date regularly
- One staff member is extremely unpleasant

As an alternative, people in this group also shop at Safeway, Trader Joe’s, WinCo Food and Costco.

3. What do you think about the overall food access in Tukwila?

Participants agreed that Saar's is at a good location for Tukwila residents and most of the time they can find things they need there. One participant and the interpreter herself drove to grocery stores and the rest walk; they didn't consider transportation as a problem. Since Saar's was the closest store to where they live, they would like to see better quality food there and to achieve that, a slight increase in price is acceptable.

4. Would you like a farmers market in Tukwila?

People strongly supported the idea for a new farmers market in Tukwila. Currently, they shopped at Columbia City Farmers Market and Burien Farmers Market since their prices and quality were very competitive.

Chapter 4. Findings and Recommendations

In this section we will first summarize major findings from data analysis; then present recommendations for both Saar's Super Saver Foods and the City, and finish with an evaluation of supplemental food business models.

Findings from the Data

The following key findings were identified from primary research and surveys and focus groups.

Consumer Behavior

- Transportation is not a barrier to grocery shopping.
- Food quality & availability, store cleanliness, and prices are Tukwila residents' most primary concerns in making grocery shopping decisions.
- Tukwila residents shop for groceries outside Tukwila 70% of the time.
- Tukwila families have a \$93.5 weekly budget for groceries, with an average household size of 3.4. According to the 2013 data from the USDA, the cost of feeding a family of four a healthy diet can run \$146 to \$289 a week, based on preparing all the meals and snacks at home for a couple with two school-aged children.²³
- The community is supportive of a new farmers market in Tukwila. According to them, organic produce should play a key role in the new market, and the market should feature Tukwila's diverse populations.

About Saar's

- The majority of Saar's customer base has lower household income.
- Saar's gained its reputation by offering wide ethnic food choices, attracting customers from local as well as surrounding cities.
- People's travel time to store, either by driving or walking, is an advantage of Saar's.
- There is large room for Saar's to improve its food quality, selections, and store layout.
- A Coffee shop, bakery, and pharmacy are three most wanted add-on services at Saar's. If these services were to be added, people would like to shop there more often.
- People would like to see more organic options at Saar's, as the current selections are limited. Their destinations for organic food include Trader Joe's, PCC, Whole Foods, etc.
- Given a significant amount of negative reviews of Saar's, people still would like to give it a try if improvements are made.

²³ Hellmich, Nanci. "Cost of Feeding a Family of Four: \$146 to \$289 a Week." *USA Today*. Gannett, 01 May 2013. Web. 08 Oct. 2014.

Recommendations

We will first list viable options for Saar's based on the community feedback, and then address policy options for the City of Tukwila, in the form of a policy matrix for further evaluation.

For Saar's Super Saver Foods

- Make it a one-stop grocery store. This option could be accomplished by coordinating with other local businesses on e.g. advertising, to increase the opportunity for people to accomplish more than one task on their way to and from the grocery store;
- Expand services offered at the grocery store, e.g. coffee shop, pharmacy, floral, and food court/dine-in area;
- Examine ways to improve people's perception of the quality of fresh produce and meat;
- Expand organic food options;
- Offer more variety of products and brands;
- Reduce prices of certain products and have more sales and specials to keep its competitiveness among local grocery stores;
- Check product expiration dates more often; make sure there is no expired food on the shelf;
- Renovate store layout, make it cleaner and brighter. The store should consider taking off some signs and labels which might block the view, and organizing items better;
- Make the store exterior more visible and appealing;
- Improve security in the parking lot-could use a repavement and add lighting.

For City of Tukwila

The City of Tukwila has built a relationship with Saar's Super Saver Foods. To deepen this relationship and make it last, and therefore benefit more residents, the following recommendations should be considered:

- Continue the City's effort in revitalizing Tukwila International Boulevard. The City could continue its effort in making TIB a more secure and welcoming neighborhood in the future.
- Involve Saar's Super Saver Foods in more community events in the future. This could offer a great chance for Tukwila residents to know more about Saar's and help the store build its reputation.
- Connect Saar's with King County's Kitchen Cabinet Program. Under this program, the store could possibly purchase produce directly from local farmers and save costs.

Besides these recommendations, we will look into some other food business models that could also increase the overall food access.

Supplemental Food Business Models

Tukwila needs more than a quality grocery store to eliminate the “food desert” title. As a complement to that, other kinds of community food initiatives such as farmers markets and food courts, can also take their parts in improving local food environment.

Farmers Market

Farmers markets are becoming increasingly popular and provide abundant sources of fresh produce and other goods. Washington State has had over 160 operating farmers markets today.²⁴ King County is home to an impressive selection of farmers markets and several of them have been nationally recognized, such as Pike Place Market in Downtown Seattle. Some farmers markets in King County are non-profits, some are proprietorships, and some are programs of an organization, which can be local government or associations.²⁵

There are some significant benefits of farmers markets. First, they give growers and producers of agricultural commodities and other related products marketing opportunities; second, they provide an opportunity for farmers and local residents to know and learn from each other directly; last but not least, they improve the variety, freshness, and nutritional value of available produce.



Figure 6. 2005 Tukwila International Farmers Market.
(Source: City of Tukwila)

Previous study shows that low-income households, especially seniors, are more likely to buy food at farmers market.²⁶ We believe that Tukwila can benefit significantly from a farmers market that serves accessible and affordable home-grown and homemade food to its residents. It can address the ethnic diversity in the neighborhood, which not only brings opportunity for local immigrant and refugee residents to be self-sufficient, but at the same time has the potential to become a food hub that attract people from surrounding cities and even further.

²⁴ "Washington State Farmers Market Manual." WSDA, 2012. Web. 19 July 2014.

²⁵ "Farmers Market Report." *Farmers Market Report, King County, Washington*. King County Agriculture Program, Feb. 2010. Web. 07 Aug. 2014.

²⁶ *Waukhara County Food System and Access Study*. Thesis. UW-Extension, 2012. N.p.: n.p., n.d. Web. 16 July 2014.

In 2005, Tukwila started its first farmers market-Tukwila International Farmers Market, with the goal to continue revitalizing the neighborhood along Tukwila International Boulevard by attracting customers to the area and fostering community pride. Located at the intersection of Tukwila International Boulevard and South 144th Street, the projected location of Tukwila Village today, the market opened every Wednesday 3pm-7pm, from July 25th through September 28th. Vendors on-site included farmers, processors, produce resellers, crafters, and prepared food vendors. The City viewed this market as a pilot project and it was only operated in 2005. During the 2005 market season, the average number of vendors throughout the whole market season was 22.6 and annual sales was \$26,948.

Nevertheless, this market was a successful pilot project for it enabled the City to better understand the market capacity, customer demand, as well as the potential for improvement. Comparing to this first farmers market 9 years ago, we have the following improvements/advantages today in the neighborhood to bring a brand new farmers market:

- Improved safety around Tukwila International Boulevard
- Tukwila Village will become a major community gathering space
- The City's input and community support

Significant challenges to overcome were perceived competition from other markets and grocery stores, regulatory barriers, issues with location, generating sufficient revenues, and attracting the right vendors and customer. After a thorough case study we found the following characteristics for a farmers market to operate successfully in an underserved area:

- A safe, accessible, and inviting public space
- Bring together people from different ethnic groups and incomes
- Give registration priority to local low-income residents
- Have flexible market hours

Farmers markets are playing an important role in providing healthy foods to underserved communities. It is also a great community gathering place where people from different cultural background can interact with each other and share their love towards food.

Fresh Produce Truck

Many residents of lower-income areas also lack reliable transportation to supermarkets in adjacent city neighborhoods or suburbs, further constraining their shopping options. This is where the idea of fresh produce trucks came from.

One successful business model that is worth learning from is called Fresh Truck, a retrofitted school bus that operates as a mobile healthy food market to support food access and community health across Boston neighborhoods.²⁷ Fresh Truck carries more than 30 different kinds of fruits and vegetables, nuts, whole grains, healthy snacks, as well as other healthy food items. It has sold nearly 18,000 pounds of fresh produce since July 2012, when the bus first got on the road. They work on a fixed weekly schedule and across multiple Boston locations every day, targeting communities with the least access to grocery stores and other affordable healthy food options.



Figure 7. Boston fresh produce truck. (Source: thefreshtruck.org)

Corner Store

Different from people's typical perception of a corner store, we will use Stockbox as a corner store example which stresses healthy food for people living in food deserts.

Stockbox Grocers is a start-up corner grocery store, aiming at improving access to healthy food and easing the burden for families living in food deserts. In



Figure 8. Stockbox Grocers. (Source: tech.co)

2011, the first Stockbox was opened in an apartment's parking lot in Delridge, by Carrie Ferrence and Jacqueline Gjurjevich. The store itself is a transformed shipping container, but its

²⁷ "About Fresh Truck." *Fresh Truck*. N.p., n.d. Web. 11 Sept. 2014.

products cover fresh produce, dairy, frozen food, grab-and-go, as well as household items, almost all categories you can find in a regular grocery store. Currently there is one Stockbox operating in First Hill, Seattle; South Park Store was closed on August 17th, 2014.

Since their solution was to turn an old shipping container into a mini-grocery store that provides grocery staples and fresh foods, they are able to get whole foods to food deserts and charge far lower prices because their overhead does not include high start-up costs, utilities, or worker wages. With its mobility, minimal input costs, and low prices, Stockbox Grocers may be an answer to the challenges posed by food desert. It has the potential to become a more permanent structure in the future.

According to one of our neighborhood survey respondents, Tukwila is a crucial part of Stockbox's development plan. The City's Economic Development staff are expected to meet with Stockbox's co-founders' at their earliest convenience and discuss possible business opportunities.

Not every neighborhood that could benefit from increased access to healthy food has the spending power to support the development of new, large-scale, full-service grocery stores. With an understanding of the particular market conditions in the neighborhood, including both the demographics and spending power of residents and the location and sales of existing food retailers, Tukwila may consider pursuing these alternatives for increasing healthy food access.

Chapter 5. Concluding Summary

The Grocery Store Project has served as a catalyst in gathering community input in order to strengthen the local food system. Through the neighborhood survey, in-store survey and focus groups, we have successfully raised the public awareness of the Grocery Store Project and its ultimate goal — to bring more affordable healthy food options to the community.

A primary community benefit of grocery store development is in granting access to high quality, healthy foods at competitive prices. Considering the demographics of Tukwila, a large percentage of Tukwila's population would benefit from a quality and affordable grocery store. The City has been partnered with Saar's Super Saver Foods, opened in December 2013 at a key location near Tukwila International Boulevard, and has identified Saar's potential of fulfilling this role.

Community advocates and city government have been investing in efforts to improve the perception of the neighborhood both by changing the physical conditions and by increasing awareness of changes that have already occurred.

Tukwila has numerous minimarts and convenience stores; however, they traditionally haven't carried fresh produce and dairy products. Mobile produce trucks and corner stores have less inventory and selection than full-scale stores, but do offer all of the essentials households want in terms of fresh and perishable items. In addition, smaller formats have lower operating costs because they require less staff, inventory and have lower utility costs.

The Grocery Store Project supplied an assessment of the main grocery store in Tukwila-Saar's Super Saver Foods, and offered suggestions for improvements based upon thorough research. We hope that Tukwila residents will be able to see how their opinions might have changed the food environment in Tukwila in the near future.

Appendix A-Neighborhood Survey

Grocery Store Survey

Tukwila, WA



1. When was the last time you shopped at Saar's Super Saver Foods in Tukwila?

- A week ago
- A month ago
- 6 months ago or more
- I don't know Saar's is in our neighborhood
- I know Saar's is in our neighborhood but I don't shop there. Why? _____

2. a. Do you typically purchase your grocery needs at one store?

- Yes
- No

b. Which of the following grocery stores do you shop at most often? Please check all that apply, and list products that you usually purchase at checked stores.

- Saar's Super Saver Foods _____
- Safeway _____
- Seafood City Supermarket _____
- Fred Meyer _____
- Target _____
- Costco _____
- WinCo Foods _____
- Wal-Mart _____
- Trader Joe's _____
- Bartell Drugs _____
- Uwajimaya _____
- 99 Ranch _____
- Cash & Carry _____
- Other(Please specify) _____

3. How often do you shop at grocery stores?

- None
- 1-2 times a month
- 3-5 times a month
- More than 5 times a month

4. a. How do you travel to shop at grocery stores?

- Drive
- Bus
- Walk
- Other (Please specify) _____

b. Please estimate the time you travel to purchase groceries.

- Less than 10 minutes
- 10-30 minutes
- 30-60minutes
- More than an hour

c. Please provide the nearest cross street to where you live (i.e. Macadam and S. 133rd Street)

5. How much do you typically spend every time you visit a grocery store?

- \$30 and under
- \$31-\$60
- \$61-\$100
- \$100 and above

6. a. Please circle the number that best represents your decision to purchase groceries from a particular grocer.

	Not important			Very important	
Quality of food	1	2	3	4	5
Availability of food (variety, brands, etc.)	1	2	3	4	5
Prices of food	1	2	3	4	5
Customer service	1	2	3	4	5
Cleanliness of store	1	2	3	4	5
Travel time to the grocery store	1	2	3	4	5
Buying locally grown foods	1	2	3	4	5
Familiarity with a Grocery Chain	1	2	3	4	5

b. Please circle the number that best represents how well Saar's Super Saver Foods in Tukwila meets your shopping expectations.

	Not well			Very well	
Quality of food	1	2	3	4	5
Availability of food (variety, brands, etc.)	1	2	3	4	5
Prices of food	1	2	3	4	5
Customer service	1	2	3	4	5
Cleanliness of store	1	2	3	4	5
Travel time to the grocery store	1	2	3	4	5
Buying locally grown foods	1	2	3	4	5

7. a. If you have shopped at Saar's, what recommendations would you give them/what do you expect to see in the future?

b. What other services would you like at your neighborhood grocery store (check all that apply)?

- Banking
- Coffee Shop
- Food court/Restaurants
- Pharmacy/Compounder
- Liquor Sales
- Video/DVD Rental
- Floral
- Other (Please List) _____

8. If there were a chance to have another grocery store in your neighborhood, what would you expect it to be?

- Safeway
- Grocery Outlet
- Costco
- Wal-Mart
- Fred Meyer
- Bartell Drugs
- Trader Joe's
- Cash & Carry
- Uwajimaya
- 99 Ranch
- WinCo Foods
- Other (Please specify) _____

9. a. Your gender:

- Male
- Female

b. Your household size: _____

c. What is your estimated annual household income?

- \$10,000 and under
- \$10,001-\$25,000
- \$25,001-\$40,000
- \$40,000-\$55,000
- \$55,001 and above
- I prefer not to disclose

d. Which community are you currently living in?

- Tukwila
- White Center
- Bryn Mawr-Skyway
- South Seattle
- SeaTac
- Renton
- Kent
- Burien
- Other (Please specify) _____

e. What language do you use most commonly?

- English
- Arabic العربية
- Spanish español
- Somali Soomaali
- Serbian/Bosnian/Croatian српски/bosanski/hrvatski
- Russian русский
- Vietnamese Việt
- Mandarin/Cantonese 中文
- Other (Please specify) _____

Thank you very much for your participation! We are excited to bring you more healthy food options in the near future, and glad that you are interested in lending your knowledge to helping Tukwila grow.

Appendix B-In-Store Survey

Saar's Customer Satisfaction Survey

September 2014

Thank you for taking a few minutes to answer the following questions. Your preferences and opinions provide information that can improve your shopping experience with us.

1. How often do you shop at Saar's Super Saver Foods in Tukwila?

- Less than 1 time a month
- 1-2 times a month
- 3-5 times a month
- More than 5 times a month

2. a. How do you usually travel to shop here?

- Drive
- Bus
- Walk
- Other (Please specify) _____

b. Please estimate the time you travel to shop here.

- Less than 10 minutes
- 10-30 minutes
- 30-60minutes
- More than an hour

3. How much do you typically spend every time you visit us?

- \$30 and under
- \$31-\$60
- \$61-\$100
- \$100 and above

4. a. Is Saar's your primary grocery store? Yes No

b. Which of the following grocery stores do you shop at most often (Check all that apply)?

- Saar's Super Saver Foods
- Seafood City Supermarket
- Safeway
- Grocery Outlet
- Fred Meyer
- Target
- Costco
- WinCo Foods
- Wal-Mart
- Bartell Drugs
- Cash & Carry
- Trader Joe's
- 99 Ranch
- Uwajimaya
- Other(Please specify) _____

5. a. How satisfied are you with the following departments at Saar's?					
	Very Dissatisfied			Very Satisfied	
Bakery	1	2	3	4	5
Beer and wine	1	2	3	4	5
Dairy	1	2	3	4	5
Deli	1	2	3	4	5
Frozen	1	2	3	4	5
Grocery	1	2	3	4	5
Health and beauty care	1	2	3	4	5
Meat-fresh	1	2	3	4	5
Meat-packed	1	2	3	4	5
Meat-Seafood	1	2	3	4	5
Pets	1	2	3	4	5
Produce	1	2	3	4	5
b. Please circle the number that best represents how well Saar's Super Saver Foods in Tukwila meets your shopping expectations.					
	Not well			Very well	
Quality of food	1	2	3	4	5
Availability of food (variety, brands, etc.)	1	2	3	4	5
Prices of food	1	2	3	4	5
Customer service	1	2	3	4	5
Store layout	1	2	3	4	5
Travel time to store	1	2	3	4	5
Buying locally grown foods	1	2	3	4	5
Your overall shopping experience with us	1	2	3	4	5

6. a. What time during a day do you usually shop at Saar's?

- Daytime Nighttime Both

b. Do you feel safe while shopping inside the store?

- Yes No

c. Do you feel safe in our parking lot?

- Yes No

7. Please check the statements that you agree with.

a. I shop at Saar's because it is the nearest grocery store to where I live.

I shop at Saar's because I prefer it over other grocery stores.

b. I prefer well-known name brands over generic or store brands.

I don't pay attention to the brand, but only care about the quality of the product and price.

c. I prefer to have a broad selection in brands when I am looking to buy a particular item.

I prefer to spend less time shopping and don't care for having a broad selection of an individual product.

d. I can always find what I am looking for very quickly at this store.

I need to spend some time finding what I am looking for at this store.

8. What other services would you like to see at our store (check all that apply)?

- Coffee Shop
 Deli counter
 Bakery
 Butcher
 Food court/Dine-in area
 Pharmacy/Compounder
 Floral
 Other (Please list, and you can also list food options you want here)

9. What, if anything, can we do to improve your shopping experience at this store?

10. a. What is your gender?

- Male
- Female

b. What is your age group?

- Under 25
- 25-34
- 35-44
- 45-54
- 55-64
- 65 and above

c. What is your household size? _____

d. What is your estimated annual household income?

- \$10,000 and under
- \$10,001-\$25,000
- \$25,001-\$40,000
- \$40,000-\$55,000
- \$55,001 and above
- I prefer not to disclose

e. Which neighborhood are you currently living in?

- Cascade View McMicken Heights Riverton Foster Tukwila Hill
- Ryan Hill Allentown Duwamish Thorndyke Southcenter
- Outside Tukwila (Please specify) _____
- Not sure? Please provide the nearest cross street to where you live. _____

f. What language do you use most commonly?

- English
- Arabic العربية
- Spanish español
- Somali Soomaali
- Serbian/Bosnian/Croatian српски/bosanski/hrvatski
- Russian русский
- Vietnamese Việt
- Mandarin/Cantonese 中文
- Other (Please specify) _____

Thank you very much for your participation! We are excited to bring you more healthy food options in the near future, and glad that you are interested in lending your knowledge to helping Tukwila grow.

Appendix D-Budget

Grocery Store Project Budget

Survey	Price/Unit	Amount	Expenses
Neighborhood survey			
Shopping bag	\$3	30	\$90
Survey translation			\$500
Donation to Rainbow Trailer Haven			\$50
In-store survey			
Gift card*	\$1.5	105	\$157.5
Focus group			
Mug	\$2	27	\$54
Shopping bag	\$3	27	\$81
Saar's gift card	\$15	13	\$195
Dinner-1st focus group			\$100
Dinner-2nd focus group			\$40
Total			\$1,267.5

*Gift cards for in-store survey valued \$3/each. The City of Tukwila and Saar's Super Saver Foods shared the cost evenly.

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